

Pre-installation Checklist (PiC)

Practical matters of the installation process

Use this checklist to prompt discussion and prepare the client, the worksite, and the installer for a smooth, worry-free installation process. Review it with the client sometime after the sale, but before the start of work. Adapt it to what's relevant to each client and workplace.

Explain the overall process	Prepare the homeowner for
The Work Day ☐ Start date, time, and work hours	the unforeseen And possible extra expense
☐ Estimated duration of job☐ Suggested starting point and progression (e.g., upstairs rear)	Identify and Discuss ☐ Possible security system rework (notify security company)
The Installation Team ☐ Names and experience, etc.	☐ Possible refitting/replacement of window treatments
Care for the Home ☐ Protection of floors/interior (floor mats, etc.) ☐ Containment of dust (drop cloths, shop vac, etc.) ☐ Ongoing cleanup as job progresses ☐ Secure each night (no exposed openings)	☐ Possible finished wall repair/touch up Structural Issues Beyond the window, due to water damage, termites, or improper initial construction of: ☐ Framing, sheathing, and exterior veneer
 Interior Access □ Removal of window treatments (we remove and reinstall) □ Relocation of furniture (we reposition as needed) 	(siding, brick, stucco, etc.) ☐ Weather barrier (if damaged, improperly installed originally, or altogether absent) Unrelated Water Penetration Due to roof leaks or permeable exterior veneer
Window Replacement Procedure (Overview as needed) ☐ New unit prep ☐ Removal of old unit (identifying what trim/wall coverings will be disturbed [if any]) ☐ Rough opening prep ☐ Installation of new unit aligned, secured, insulated, and caulked	that can appear as window leaks Other
Wrap up ☐ Remove labels and clean glass ☐ Walk-thru with homeowner and operation review ☐ Warranty registration ☐ Code enforcement final inspection	
Other	

Coordinate the logistics with the homeowner **Possible Homeowner Responsibilities** (Clearance and access) ☐ Trimming overgrown bushes ☐ Relocate cars ☐ Remove breakables, pictures, and knickknacks ☐ Clear personal items (e.g., clutter from an interfering office desk) ☐ Arrange follow-up trades (e.g., painter, security company) House Rules – What are they? ☐ Remove shoes (e.g., on white carpet)? ☐ What bathroom to use? ☐ Anywhere off limits at any time (e.g., baby nap time)? ☐ Pets (containment or even just awareness)? ☐ How is the house locked up when leaving? ☐ Can yard sign be placed? Work Areas – Where Do We: ☐ Park installer vehicles? ☐ Stage window delivery (if applicable)? ☐ Locate dumpster (if applicable)? ☐ Set up for equipment and window prep? Other

4 Special concerns