

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.

## 1 Explain the overall process

### The Work Day

- Start date, time, and work hours
- Estimated duration of job
- Suggested starting point and progression (e.g., upstairs rear)

### The Installation Team

- Names and experience, etc.

### 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)

### Interior Access

- Removal of window treatments (we remove and reinstall)
- Relocation of furniture (we reposition as needed)

### 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

### Wrap up

- Remove labels and clean glass
- Walk-thru with homeowner and operation review
- Warranty registration
- Code enforcement final inspection

### Other

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## 2 Prepare the homeowner for the unforeseen

### And possible extra expense

### Identify and Discuss

- Possible security system rework (notify security company)
- Possible refitting/replacement of window treatments
- 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 (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 that can appear as window leaks*

### Other

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