SITE VISIT CHECKLIST

When you do work through this program, you're not just representing your business; you're also representing Xcel Energy. How you show up on-site reflects on the whole team. Use this checklist as a guide to help you deliver consistent, high-quality service on every visit. The customers in this program may be dealing with more social, financial, or environmental stress than others, which means it's even more important that the process goes smoothly. This quick guide breaks the steps into three key areas: project scope, client considerations, and health and safety.

Before the Visit

The first step to a smooth site visit is making sure both your team and the client are prepared.

Project Scope

- Confirm the appointment date, time, and who will be coming.
- Review the job scope and note any areas that need access (attic, basement, etc.).
- Confirm rebate amount and any outstanding costs previously shared by the Energy Advisors.

Client Considerations

- Identify who will be home and who has decision-making authority
  - Ask what language(s) are spoken in the home.
  - Ask if there any special communication needs or preferences that could make the process more comfortable
- Share any known communication needs or sensitivities with the team in advance.

Health & Safety

- Confirm if the home has known issues like asbestos, mold, lead paint, or pest infestations. Ask about cluttered or hoarded spaces that might limit access or create hazards.
- Ask if there is anything you should know (health-related, sensory, or otherwise) to make sure your crew can work respectfully in the home.
- Note if extra PPE, ventilation, dust containment, or scheduling adjustments are needed.

Upon Arrival

Once you arrive at the job site, the way you start the visit sets the tone. This checklist helps make sure everything is clear, respectful, and safe right from the start.

Project Scope

- Introduce yourself and clearly explain what you're there to do.
- Confirm the work area(s), how long the visit should take, and anything you need access to.
- Go over the estimated costs and how/when payment will be handled.
- Check for any code compliance concerns that may be triggered as a result of the work.

Client Considerations

- Confirm with crew members any accommodations or expectations (quiet tone, no loud knocking, using written notes, etc.)
- Speak clearly, avoid jargon, and allow extra time for questions.
- Be patient and use communication tools such as visuals and diagrams, or written explanations.

Health & Safety

- Inspect the work area for asbestos-like materials, visible mold, tripping hazards (e.g., clutter, cords), blocked exits, and poor ventilation.
- Politely verify any previously shared concerns and explain the safety steps you're taking (e.g., masks, plastic sheeting).
- Confirm the customer is comfortable with precautions before starting work. Never pressure a customer into continuing if they are uncomfortable.

During the Visit

While the work is happening, communication and awareness are key. These guidelines help make sure the job stays on track and the customer stays comfortable, safe, and informed.

Project Scope

- Keep the customer in the loop—let them know when key steps are starting or finishing.
- If something unexpected comes up, explain what it means for the job scope, timing, and cost.
- When possible, give options and explain the pros, cons, and price differences.
- If you're unsure how to proceed or the customer is upset, talk to your supervisor.

Client Considerations

- Keep the customer informed about key steps, delays, or noise.
- Ask "Is this okay so far?" or "What questions do you have?" without pressure.
- If something changes, explain clearly why and what to expect next.
- Avoid abrupt actions or raised voices.
- Be mindful of loud equipment or unexpected smells (which can trigger PTSD or sensory overload).

Health & Safety

- If uncovered mold, asbestos, or a structural issue is found, stop work immediately and assess.
- Explain clearly and without judgment what the issue is, how it might affect them, and what their options are.
- If the issue needs remediation (e.g., mold abatement), contact the Energy Advisors who can help connect them to the appropriate resources.

After the Visit

Wrapping up the visit is just as important as how it starts. A clear, respectful close-out ensures the customer knows what was done, what to expect next, and how to stay safe and comfortable in their home.

Project Scope

- Walk the customer through what was completed—make sure they're satisfied and understand how to use any new system or equipment.
- Confirm final billing and payment steps if applicable (e.g., invoice by email, payment due date).

Client Considerations

- Provide an overview of what to expect from the new equipment (e.g., new sounds, changes in operation) and who to contact with questions.
- Share *"What to Expect"* handout with the client and remind them to call the number listed if anyone contacts them unexpectedly or asks for personal information.
- Let the client know that CLEAResult will follow up after the visit—and again at 2 and 6 months—to ensure everything is working as it should.

Health & Safety

- Ensure work areas are clean, free of leftover debris/dust, and properly sealed if any openings were created.
- Walk through any equipment that affects air quality (e.g., ventilation improvements, filtration upgrades, sealed ducts).
- Provide written and verbal instruction for what to expect in the next 24-48 hrs. (e.g., curing smells, residual dust).