



## ESTIMATING CHECKLIST

- Contact customer to schedule a site visit.
- Discuss customer's lighting needs and preferences.
- Explain the installation process and timeline.
- Visit the site to assess the current lighting setup.
- Measure the area to be illuminated. Do this using a measuring wheel, or by counting soffits and multiplying them by their width. Work around the entire house, and any other areas that may be added later, so you can add tiers to the quote.
- Note any existing electrical infrastructure. Is there a safe place to install the power box? Will it give you easy access to the installation?
- Test your signal strength around the home. Note where Db signal is strong and weak. Will you have signal at your planned box location?
- Use your Nix on a few protected pieces of soffit or downspout to get an accurate colour reading
- Create your grid sheet based on the property layout
- Determine the type of track needed and depths
- Review the grid sheet for accurate measurements and calculations.
- Identify any additional materials required (e.g., wires, connectors, fixtures).
- Calculate the total linear footage of lighting to be installed, as well as a small buffer
- Determine with the customer if there is a need to upgrade existing WIFI infrastructure.
- Prepare a quote, using the grid sheet as a guideline and visual representation of the house. Prepare a basic quote, and also an expanded quote with any extra areas the customer may wish to add.



## ESTIMATING CHECKLIST

- Present the estimate to the customer, explaining the breakdown of costs.
- Address any questions or concerns the customer may have.
- Provide the customer with a timeline for the installation.
- Collect the deposit from the customer
- Confirm the estimate in writing, including terms and conditions.
- Schedule the installation date based on the customer's availability.

### Notes:

**Note areas you may have problems in, do you need a hydraulic lift or 40 foot ladder, etc.**

**Keep a copy of the estimate for your records.**

**Update the grid sheet with the final installation details.**

**Document any changes or modifications made during the installation process.**