

Commercial Cleaning Walkthrough Intake Sheet

A free walkthrough intake sheet for commercial-cleaning companies that need cleaner site notes, tighter bid prep, and stronger first-impression discipline.

Commercial-cleaning owners, sales reps, coordinators, and operations leads

GUIDE

A free walkthrough intake sheet for commercial-cleaning companies that need cleaner site notes, tighter bid prep, and stronger first-impression discipline.

WHAT THIS ASSET COVERS

- A site-walkthrough template for scope, frequency, building type, and access
- Prompts for occupancy, service windows, and special cleaning concerns
- A note structure for proposal follow-up and ops handoff

USE THIS WHEN

1. Walkthrough notes are inconsistent or incomplete
2. Bids take too long after the visit
3. The team wants better handoff from sales into operations

WORKING ASSET

CAPTURE

- site name and address
- building type
- square footage estimate
- service frequency
- hours of access

NOTE

- restrooms
- kitchens and break areas
- floor types
- special scope or compliance concerns

HANDOFF

- proposal owner
- next step date
- ops notes

DEPLOYMENT NOTES

HOW STRONG TEAMS ACTUALLY USE THIS ASSET

- Assign one accountable owner instead of letting "Commercial Cleaning Walkthrough Intake Sheet" become shared but unmanaged work.
- Use it with commercial-cleaning owners, sales reps, coordinators, and operations leads in a weekly rhythm so the asset drives decisions rather than sitting in a folder.
- Decide in advance what counts as green, watch, and red performance so the team knows when to escalate.
- Capture learnings directly in the document every week so the asset becomes smarter over time instead of resetting to zero.

HOW TO GET STRONGER OUTPUTS FROM MODERN AI MODELS

- Start with a compact context packet: business type, customer situation, service offered, tone guardrails, and any facts the model must preserve.
- State the deliverable shape up front: channel, word count, required fields, and the exact output format you want back.
- Use variables and clear delimiters so the prompt can be reused safely by staff without rewriting the entire instruction every time.
- Include one strong example when tone and structure matter, then ask for a final answer only rather than hidden reasoning.
- Add a final self-check step for compliance, specificity, and whether the response actually sounds like a real operator wrote it.

BEST DEPLOYMENT SEQUENCE

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WHAT SEPARATES A SERIOUS VERSION FROM A BASIC TEMPLATE

- Clear ownership for every step, not generic advice without accountability.
- Targets, thresholds, or decision rules that tell the team what good looks like.
- Specific working components: A site-walkthrough template for scope, frequency, building type, and access, Prompts for occupancy, service windows, and special cleaning concerns, A note structure for proposal follow-up and ops handoff.
- A built-in review cadence so the document becomes part of operations rather than a one-time download.