

SUBCONTRACTOR CONTRACTING GUIDE

Company Info	A#	Company Name:		
	Primary Contact:			Other Contact:
	Email Address:			Alternate Email:
	City/State:			DMA:
	Primary Phone:			Alternate Phone:
	Days & Hours of Operation:			Does Servicer have office personnel? <input type="checkbox"/>
	Number of Install Teams/Field Staff:			Number of Install Teams that can be dedicated to Installs: <input type="text"/>
	Does Servicer carry Worker's compensation insurance? <input type="checkbox"/>			Meets Insurance req's? GL/Auto- willing to name us add'l insured? <input type="checkbox"/>
Non-Starters	Able/willing to update DOLI regularly? <input type="checkbox"/>	YES		
	Able/willing to use Mobile App for updates? <input type="checkbox"/>	YES		
	Willing to conduct background checks? <input type="checkbox"/>	YES		
	Vehicles(highlight):	Box truck	Cargo Van	Pickup Truck with Cap
Pickup Truck without cap				
Other(explain)				
Years in business & summarize experience. Are you doing or have you done any work for big-box retailers? If so, who?				
Have you ever contracted with Installs, or worked for a company that contracts with Installs for work? If so, who? (FM must obtain Director OK)				
What percent of your business is done because of referrals from satisfied customers? Can I reach out to a customer or two from a referral?				
Licenses Held(Plumbing, gas, elect, low voltage, etc.):				Looking for primary or filler work? <input type="checkbox"/>
Do you have any warehouse space available to us, if necessary?		YES/NO	Size of warehouse (Sq Ft):	Is warehouse secure? Y/N
Service types	Consumer Electronics	Appliances	Home Services	Plumbing/Water Heaters
	Window Treatment/Blinds	PC	Home Automation/GDO	Other
Recruiter Comments:				
ALL SKILLSETS	Hiring/Management Practices	Specific questions relating to sourcing, on-boarding, training, dispatching new Servicers		GRADE 1-10, 10 being best
	Sourcing of new talent	When you hire a new employee/subcontractor, what traits/skills do you look for? (look for c-service attributes)		
	Onboarding/training	When you make the decision to hire, what does your training regimen look like? How do you ensure they are ready before sending them into a home alone? (Look for validation of c-service skills, technical skills, training program)		
	On-Going/daily management	How do you verify that your employees or subcontractors are meeting or exceeding expectations on every job? How do you ensure they are representing your company well? What type(s) of follow-up do you do as a company owner to ensure their workmanship and professionalism is acceptable? (Look for ride behinds/calls to customers/something proactive)		
FM vetting call notes/recommendations/reasoning:				
Vetting call results- Select "Approved or Not Approved"				
If approved, approved for which client(s) and which level(s)? Select only those that apply, in order of ability		Client(pick)	Level(pick)	Notes
Select Approved Client/Level1		Other--- Explain to right		
Select Approved Client/Level2				
Select Approved Client/Level3				
Select Approved Client/Level4				
Select Approved Client/Level5				
Select Approved Client/Level6				
Select Approved Client/Level7				
Select Approved Client/Level8				
Select Approved Client/Level9				
Select Approved Client/Level10				
Approved For The Following DMA(s) (List)				
Does Servicer agree to all standard rates? (if not standard rates, explain)				
Vetted By:		FM Name:	Submitted to:	Date

Skillsets (Highlight)	Appliance Installation	Appliance Delivery
	High-End Appliance Installation	Cabinet Modifications
	Countertop Modifications	Electrical Modifications

Are you willing to purchase & supply parts for Appliance Installs?(HHG) Do you have any Manufacture

Specific questions--- choose at least 3 questions; capture responses and rate the Servicer's response for completeness and ;

Walk me through a dishwasher delivery, installation and haul-away- include how you handle customer interaction: (introduction, pre-ins controls, walking the cx through process, cleanup, product demo, validate satisfaction):

How do you install a dishwasher for a customer with granite countertops? (Side-mount unit is most preferred, 'Granite Grabber' second c

What parts do you carry with you on your truck? (supply lines, brass fittings, shutoffs, power cords, extensions):

What do you do to protect the customer's property during installation? Do you carry anything specific on your truck to help? (PVC sleds, r

All dishwasher manufacturers require a 'high-loop'. Can you explain what that is? Some may refer to it as prevention of the backflow of v bottom of the unit to the highest point you can in the sink base to avoid improper draining and prevent sewer gas backflow). Follow-up w dishwasher considered a 'high-loop'?(No, it's not a substitute).

FM vetting call notes/recommendations/reasoning:

Gas Appliance hookup/modifications	
Plumbing Modifications	
Other(Explain):	
er certifications?(List)	
accuracy	GRADE 1-10, 10 being best
tall walk, pre-measure and validate new product correct, damage	
choice, some models are floor-mountable, but not preferred):	
moving blankets, appliance dolly, corner guards, shoe booties, etc):	
wastewater to the dishwasher. (Run the drain hose from the with the question 'is the integrated hose run on the side of the	

Skillsets (Highlight)	Home Theater Installation	Basic TV setup
	Electrical Outlets	On-Wall Installation
	IPTV(Internet Protocol TV) Setup	Harmony Remote Setup

Specific questions--- choose at least 3 questions; capture responses and rate the Servicer's response for comp

Walk me through a basic on-wall TV installation and haul-away- include how you handle customer interaction: (introduction, pre-install walk, pre-measure and validate new product correct, validate placement of TV on wall(painter's t cx through process, cleanup, product demo, validate satisfaction):

What spare parts do you carry with you on your truck? (HDMI cables, Optical cables, Power Bridges, speaker wires, bracke moulding for wire concealment, etc.):

What specific tools do you carry on your truck to make an in-wall home theater installation go smoother? (Stud finder, lev rods, flashlight, spade bits, etc.):

You are conducting an on-wall, articulating mount TV installation. How do you ensure that the wall will support the new T (Find studs w/studfinder---not nails, verify all mounting lag screws hit center stud. No toggle bolts or wall anchors).

Explain to me what a power bridge does. (It is an in-wall extension for an existing power outlet to get power to a wall moi stud bay)

How do you program a Harmony remote control? (You need to have a laptop to program online)

In most cases, we require Smart TVs to be setup on the customer's wireless network. Explain how this is accomplished.

FM vetting call notes/recommendations/reasoning:

Furniture Assembly(TV Stand)	In-Wall Wiring
Above Fireplace Installation	High End/Custom Work
Sonos setup	Calibration
Completeness and accuracy	GRADE 1-10, 10 being best
(tape), damage controls, walking the	
ts, low voltage boxes, track	
el, fish tape, cordless drill, glow	
TV and mount under normal use?	
unted TV, typically within the same	

Skillsets (Highlight)	Appliances	Mattress/Box Springs/Bedding	Fitness Equipment
Ask these 3 questions; capture responses and rate the Servicer's response for completeness and accuracy			
Walk me through a typical delivery from start to finish, including customer interaction: (Looking for call-ahead night before or AM with window, 30-minute call-ahead, arrival at customer's home, introduction of crew, pre-delivery walkthrough of home, verify placement of product, setup(if applicable), product walkthrough, verify cx satisfaction, cleanup)			
What damage prevention measures do you take while delivering product to a customer? (Looking for moving blankets, dolly, moving straps, corner protectors, pre-measuring, pvc sleds to protect floors)			
Home delivery is a tricky business when trying to set delivery times; what is your typical process if you run behind on the first order of the day? (Looking for calling all other customers, re-setting windows, notifying Clients)			
FM vetting call notes/recommendations/reasoning:			

Other Large Delivery

GRADE 1-10, 10 being best

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Skillsets (Highlight)	Wireless Door Locks/Deadbolts	Security Camera Installation- Wired
	Wireless Thermostats	Security Camera Installation- Wireless
<p>Specific questions--- choose at least 3 questions; capture responses and rate the Servicer's response for completeness and accuracy</p>		
<p>Explain in detail how you would complete a wired camera installation. Include types of problems that can arise and how would you solve those issues?</p>		
<p>What process do you follow to connect cameras to the customer's DVR equipment? (If not included during walk through)</p>		
<p>What kind of training do you give your customers on the installed equipment? Are they able to follow up with you if they have questions? Is there licensing is required for their area?</p>		
<p>What tools or spare parts do you carry in your vehicle to assist with your jobs?</p>		
<p>What experience do you have installing Smart Locks, Doorbells, or Thermostats. Tell us about a recent installation.</p>		
<p>FM vetting call notes/recommendations/reasoning:</p>		
<p> </p>		

'Smart' Garage Door Openers

GRADE 1-10, 10 being best

Skillsets (Highlight)	Ceiling Fan Installation	Light Switch Installation	New Electrical Outlets
	Site Survey/Consultation	Ceiling Mount or Wall Light Installation	Hardwired Smoke Detector/CO2 Detector

Specific questions--- Capture responses and rate the Servicer's response for completeness and accuracy

What permits are required for each installation type in your area? (Ceiling fans, smoke alarms, etc)

How would you know which size wire will be necessary to run for a double wall-oven installation? -or - What size breaker is needed? (Looking for an answer involving Ohm's law, or resistance/amperage/voltage.)

What spare parts do you carry with you on your truck? (crimpers, cutters, drywall saws, electrical boxes)

FM vetting call notes/recommendations/reasoning:

Run New Circuit back to Panel

Other

GRADE 1-10, 10 being best

Specific questions--- choose at least 3 questions; capture responses and rate the !

How many garage door openers would you say you have installed in the past year? In your

What would you say are the most common issues with garage door openers? (sensing eyes ability)

Do you ever run into mounting issues with garage door openers? How do you rectify the in degree perforated steel] or straight perforated steel)

Can you install the same garage door opener on a 7' high door as an 8' or 10' high door? An extension kit needed to extend the track)

Can you use an extension cord if the customer doesn't have power to the ceiling near the c plug to make it fit the outlet, and make sure the opener is grounded)

FM vetting call notes/recommendations/reasoning:

Service's response for completeness and accuracy

career?

getting bumped or moved; tension control on the opener affecting open/close

stall if the existing bracket doesn't align properly? (use a piece of angle bracket [90-

re there any adjustments or accessories needed? (with taller doors there is an

opener? (no - never use an extension cord, instead use a 2-wire adapter or modify the

Skillsets (Highlight)	Horizontal Blinds	Vertical Blinds	Shutters
Ask these 2 questions; capture responses and rate the Servicer's response for completeness and accuracy			
Walk me through a typical installation from start to finish, including customer interaction: (Looking for call-ahead night before or AM with window, 30-minute call-ahead, arrival at customer's home, introduction of crew, pre-delivery walkthrough of home, verify which window treatments go where, verification of mount type before drilling, product walkthrough, verify cx satisfaction, site cleanup)			
What type of tools do you carry for an installation? (Ladder- verify if not mentioned, drill, screwdrivers, shop vac to clean up dust, tape measure, laser measure)			
FM vetting call notes/recommendations/reasoning:			

Templating of windows
GRADE 1-10, 10 being best

sets (Highlighted)	Basic PC	Networking	
	Server Work	Hardware Replacement	
	RAID/SAN Configuration	Exchange Setup	

Specific questions--- choose at least 3 questions; capture responses and rate the Servicer's response for

Are you familiar with connecting and setting up networks both wired and wireless? (Walk me through a setup of wireless router):

What method would you use to perform a data transfer and do you use any specific tools or devices? (tornado, flash drives, external drive) And on average, how long does the typical 10GB data transfer take you?

Are you capable of configuring wireless file and printer sharing? (Walk me through?)

Are you familiar with latest versions of Windows? MAC/Apple/Linux?

Walk me through your typical basic pc setup, including your interactions with the customer.

What type of tools, or backup items do you carry with you to job sites, in cases where the customer may require additional services "on-site", which were not on the original work order?

FM vetting call notes/recommendations/reasoning:



Skillsets (Highlight)	Water Heaters(Tank)	Water Heaters(Tankless)	Water Filtration/Softeners(whole house)
	Faucets	Toilets	Sinks
Ask these questions; capture responses and rate the Servicer's response for completeness and accuracy			
Walk me through a typical installation from start to finish, including customer interaction: (Looking for some sort of prequalification of existing setup, discussion that additional charges may apply based on code requirements, call-ahead night before or AM with window, 30-minute call-ahead, arrival at customer's home, introduction of crew, pre-delivery walkthrough of home, code compliance check and additional labor discussion(if applicable), installation, product walkthrough, verify cx satisfaction, site cleanup)			
What types of extra parts do you carry on your truck for plumbing installations? (Looking for shutoff valves(gas and water), copper fittings, dielectric unions(water heaters), copper pipe, overflow tubes, expansion tanks, etc.)			
What type of tools do you carry for an installation? (dolly, pipe cutting tools, torch, solder, flux, and some method for gas leak detection, etc.)			
W.HTR ONLY: Can you explain to me the purpose of a thermal expansion tank for a water heater? (Safely controls thermal expansion by accepting the expanded water and keeping the system pressure safely under the relief valve setting. This helps avoid tank failure or catastrophic event)			
W.HTR ONLY: Are there any municipalities within your servicing area that require an expansion tank or overflow pan where they did not previously exist? Do any of the municipalities that you service mandate the replacement of a gas or water valve based on age or type? (This is to determine if they will be code compliant- do they seem to know what they are talking about?)			

FM vetting call notes/recommendations/reasoning:

Water Filtration(Point of use)

Vanities

GRADE 1-10, 10 being best

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