Commercial Cleaning Site Walkthrough Brief

A practical worksheet for facility and property managers to capture the details a cleaning provider needs before scoping and pricing.

Use before pricing	Walk the premises with each shortlisted provider using the same questions. Record what is observed, what is included and what still needs confirmation. Attach photographs or a marked floor plan where useful.

1. Appointment and site profile

Organisation / site	
Address / meeting point	
Walkthrough date and time	
Client attendees	
Provider attendees	
Target start date	
Current service pattern	
Reason for review / change	

Documents or information to have ready
[ ] Approximate floor area or floor plan
[ ] Operating hours, occupancy and peak periods
[ ] Current task list and service frequency
[ ] Known access, alarm and key procedures
[ ] Site induction and contractor requirements
[ ] Waste, recycling and consumables arrangements
[ ] Known surface, equipment or contamination constraints
[ ] Authorised contacts for scope and pricing questions

2. Walk every service zone

Record each distinct zone rather than treating the premises as one generic area. Note condition, traffic, surfaces and the result expected.

Area / zone	Observed condition	Tasks / outcome needed	Frequency / timing

Prompts during the walk
[ ] Entrances, reception and client-facing areas
[ ] Workstations, meeting rooms and private offices
[ ] Kitchens, tea points and staff amenities
[ ] Toilets, showers and change rooms
[ ] Floors by surface type and condition
[ ] Internal glass, partitions and touchpoints
[ ] Warehouses, loading areas or production interfaces
[ ] External entries, waste rooms and bin movement

3. Access, safety and service constraints

Access and security
[ ] Permitted service windows and earliest / latest access
[ ] Keys, swipe cards, alarms, concierge or sign-in process
[ ] Restricted rooms, privacy controls and authorised access
[ ] Lift, loading dock, parking and equipment-movement limits
[ ] Lock-up, failed-access and lost-credential procedures
[ ] Primary and after-hours escalation contacts

Site and safety controls
[ ] Required induction, permits and contractor documents
[ ] Known hazards, live operations and exclusion zones
[ ] Chemical approval, storage and Safety Data Sheet access
[ ] Required PPE and pedestrian / mobile-plant separation
[ ] Emergency, spill, damage and near-miss reporting
[ ] Any task requiring separate specialist assessment

Questions and observations requiring follow-up

4. Turn the walkthrough into a comparable proposal

Require each proposal to state
[ ] Included areas, tasks and frequencies
[ ] Explicit exclusions and separately priced periodic work
[ ] Proposed service window, labour approach and supervision
[ ] Equipment, chemicals and consumables responsibilities
[ ] Inspection, reporting and issue-rectification process
[ ] Insurance, staff-vetting and site-document evidence
[ ] Mobilisation steps, first-service date and review point
[ ] Price assumptions, change control, term and exit conditions

Decision checkpoint	Status	Owner / due date
Scope questions closed		
Access process confirmed		
Safety requirements confirmed		
Optional work separated		
Quality checks agreed		
Decision / follow-up owner		

Next actions

This worksheet is a practical scoping aid, not legal or safety advice. Adapt it to the premises, risk controls and procurement requirements. For a site-specific assessment, visit cleaney.com.au or call 1300 707 371.