STANDARD OPERATING PROCEDURE

Job Completion and Customer Sign-Off SOP

Document no.	SOP-FSV-003
Revision	1.0
Owner	Service Operations Manager
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Review cycle	Every 12 months

1. Purpose

To make sure every completed job is verified against its scope, properly documented, invoiced accurately and formally accepted by the customer before the crew leaves the site.

2. Scope

Applies to the close-out of any field service job, including repairs, installations and preventive maintenance visits, once the technical work is finished. It does not cover the diagnosis or repair work itself.

Definitions

Scope of work	The list of tasks agreed with the customer or specified on the work order for the job.
Change order	A documented change to the original scope or price, agreed with the customer before extra work is billed.
Punch item	A small remaining task or defect found during the final walkthrough that must be fixed before the job is considered complete.
Job file	The complete set of records for a job, including the signed work order, photos, invoice and warranty documents.

3. Responsibilities

Technician	Confirms the scope is finished, performs the final quality check, and walks the customer through the completed work.
Service Coordinator	Processes completion paperwork, updates records, and triggers the customer satisfaction survey.
Service Manager	Reviews change orders and pricing exceptions, and resolves customer disputes at close-out.
Customer Contact	Reviews the completed work, approves any change orders, and signs the work order to accept the job.

RACI matrix

Activity	Technician	Service Coordinator	Service Manager	Customer Contact
Confirm scope is complete and perform final check	R/A	I	I	C
Approve change orders and final	R	I	A	C

Activity	Technician	Service Coordinator	Service Manager	Customer Contact
pricing				
Collect customer sign-off	R/A	I	-	R
Submit and file completion paperwork	R	R/A	I	-

R = Responsible, A = Accountable, C = Consulted, I = Informed

4. Materials and PPE

Materials, tools and systems

- Original work order or contract scope
- Company quality checklist
- Mobile device with field service app for photos and signature
- Invoice or change order form
- Warranty and maintenance documentation for the customer

5. Procedure

Step	Task	Owner	Done
5.1	**Confirm the scope of work is finished** Technician walks the job against the original work order or contract and confirms every line item has been completed, noting any items that could not be finished and why.	Technician	☐
5.2	**Perform the final quality check** Technician runs the installed or repaired equipment through a full operating cycle and checks the workmanship against the company's quality checklist. **Checkpoint:** Equipment completes a full operating cycle and every quality checklist item passes before the job is marked complete.	Technician	☐
5.3	**Document parts, materials and labor used** Technician records all parts consumed, serial numbers of any equipment installed, and actual labor hours in the field service system for accurate billing and warranty tracking.	Technician	☐
5.4	**Photograph the completed work** Technician takes photos of the finished work area, the equipment nameplate, and any required labeling, and attaches them to the job file.	Technician	☐
5.5	**Restore and clean the work area** Technician removes debris, packaging and old equipment, and returns furniture, panels and covers to their original position before calling the customer over.	Technician	☐
5.6	**Walk the customer through the finished work** Technician explains what was done, demonstrates operation of any new controls or equipment, and answers the customer's questions on site. **Checkpoint:** Customer can demonstrate operating the new or repaired equipment before the technician leaves.	Technician	☐

Step	Task	Owner	Done
5.7	**Resolve any punch items found** If the customer or technician finds a small remaining issue during the walkthrough, the technician fixes it on the spot where possible or schedules a specific return visit to close it out.	Technician	☐
5.8	**Present pricing and any change orders** Technician or service manager presents the final invoice, explains any charges that differ from the original estimate, and gets the customer's written approval for change orders before billing.	Technician	☐
5.9	**Collect the customer's sign-off** Customer contact reviews the completed work order and signs it digitally or on paper to confirm the job is finished and acceptable. **Warning:** Do not leave the site without a signature or a documented reason the customer could not sign, such as being offsite.	Customer Contact	☐
5.10	**Provide warranty and maintenance documentation** Technician leaves the customer a copy of the warranty terms, basic maintenance recommendations, and the company's contact information for future service.	Technician	☐
5.11	**Submit completion paperwork** Technician submits the signed work order, photos and parts list to the office by the end of the same business day for invoicing.	Technician	☐
5.12	**Update records and trigger the survey** Service coordinator updates the customer relationship and equipment records with the completed job details and sends the customer a satisfaction survey.	Service Coordinator	☐

6. Quality checks

- Every closed job file contains a signed work order, photos and a completed quality checklist.
- Change orders above the technician's authority are approved by the service manager before invoicing.
- Job files are submitted to the office within one business day of completion.
- Customer satisfaction survey response rate is tracked monthly.

7. Records

- Signed work order and quality checklist
- Completion photos
- Change order approvals
- Warranty documentation provided to the customer
- Customer satisfaction survey responses

8. KPIs

- Percentage of jobs closed with a signed work order on the day of completion
- Number of punch items or callbacks per completed job
- Time from job completion to invoice submission
- Customer satisfaction survey score

9. Common mistakes

- Billing a change order the customer never approved in writing.
- Leaving the site before the customer confirms they understand how to operate new equipment.

- Submitting paperwork days after the job instead of the same business day.
- Skipping the final quality check on jobs that seem straightforward.

10. Revision history

Revision	Date	Description	Reviewed by
1.0	September 15, 2026	Initial release	Ilia Pirozhenko

Approval

Prepared by	Approved by	Date

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