

Site Survey Request Checklist

Prepare for a cleaning site survey so the quote you get back is accurate the first time.

A site survey is how a cleaning contractor turns your building into an accurate, fixed monthly price — the more prepared you are for it, the fewer follow-up questions and the faster you get a quote you can actually rely on. This checklist covers what to have ready before the surveyor arrives.

Download the checklist

A pre-survey preparation checklist you can work through before booking a site survey.

Information to have ready

- Total floor area and a rough floorplan or area breakdown, if available
- Number and type of areas: offices, washrooms, kitchens, meeting rooms, communal areas
- Current cleaning frequency and hours (if you already have a contractor)
- Any existing specification or contract you can share
- Known problem areas or recurring complaints
- Hours of building access and any security/access procedures for the surveyor
- Whether consumables (soap, paper, bin liners) are currently supplied by you or your cleaner
- Any specialist requirements: healthcare/infection-control standards, food-hygiene areas, high-security zones

Questions to ask the surveyor

- How will the price be broken down (labour, consumables, management, VAT)?
- What frequency and staffing level do they recommend, and why?
- What insurance and vetting (DBS/PVG/AccessNI) do their operatives hold?
- How is quality monitored and reported once the contract starts?
- What does mobilisation look like, and how long does it take from signing to go-live?
- If you already have a cleaner, how would TUPE be handled?

After the survey

You should receive a quote built from the survey findings, referencing a written specification — not a generic price per square metre with no detail behind it. Use our proposal comparison template if you are getting more than one quote.

Prepared by Optus Glean UK — nationwide commercial cleaning. For a free site survey and a fixed monthly quote, visit optusglean.co.uk/quote or call 0330 027 2159. This template is provided as a practical starting point and is not legal advice.