

4.1 Pre-inspection routine

1. Make sure you have all the information you need, which includes –
 - the inspection date
 - the inspection time
 - the inspection address, preferably entered into your GPS.
 - the house age and size, as estimated by the client or agent, depending on who booked the inspection
 - the clients' names, address and phone number
 - the listing agent's name, company name and phone number (cell phone, too)
 - the selling agent's name, company name and phone number (cell phone, too)
2. If you use a paper contract, fill in the buyer's name and address if appropriate on the contract or the appropriate page on the report. Again, we encourage you to send an electronic contract well ahead of the inspection that a client can review and accept ahead of time.
3. If you will be invoicing your client, have the invoice prepared. We suggest having the client pre-pay online before the inspection.
4. Memorize the buyers' names.
5. Memorize the listing agent's name and selling agent's name.
6. Check your map or GPS to locate the inspection address and plan your route.
7. You want to arrive 15 minutes before the inspection start time. Determine the approximate travel time to the inspection address at that time of day. Let's assume that it's 20 minutes. Now, add 10 minutes for unexpected traffic delays and a drive through the neighborhood. The total time then is 30 minutes. (You may or may not want to trust your GPS.) Plan to leave the office at 8:15 to arrive at the inspection site at 8:45 a.m. If the traffic is as expected, you'll be there at 8:35 a.m.
8. Review your inspection routine. Your order should always be consistent. For example –
 - Seller introduction
 - Exterior – first tour
 - Introductory discussion
 - Roof
 - Exterior – second tour
 - Basement or crawlspace if applicable
 - Heating

- Plumbing
 - Electrical
 - Interior – first tour
 - Interior – second tour and heating or air conditioning test
 - Attic/crawlspace (if not done earlier)
 - Report preparation, if delivering report on site
 - Closing discussion
9. As part of this process, review your script for your introductory and closing discussions. Are your current presentations working well, or should something be changed?
10. Review your time goals for the inspection. For example, for a 2½ hour inspection –
- after 10 minutes, you should have completed the introductory discussion.
 - after 40 minutes, you should have finished the roof and the exterior.
 - after 70 minutes, you should have finished the mechanical, electrical and structural systems.
 - after 100 minutes, you should have finished the interior.
 - after 115 minutes, you should have finished the attic and crawlspace.
 - after 135 minutes, you should have finished recording your results.
 - after 150 minutes, you should have finished.

150 minutes is 2½ hours!

VEHICLE CHECK

11. Vehicle check:
- Is your vehicle clean and fueled?
 - Is there room for your client or clients to join you if you have to discuss the report in the vehicle?
 - Check that you have all of the things that you normally carry in your vehicle, including –
 - ladders
 - inspection tools
 - map or GPS device
 - papers and reference materials
 - spare supplies including a second flashlight, batteries, pens, report forms, seller letters, business cards, brochures, a clean shirt, an umbrella, coveralls, indoor shoes or slippers
 - cell phone
 - camera, if not using your phone as a camera
 - computer or tablet if applicable

Note: don't leave your rechargeable flashlight in the charger at home.

12. Self-check:
 - Are you clean and presentable?
 - Are you fueled? (Have you eaten recently?)
 - Is your bladder empty?
 - Do you have a comb, breath mints, deodorant? (You might have more than one inspection by the time the day is done.)
13. At 8:15 a.m., leave the office or home to head to the inspection.
14. At about 8:35 a.m., you should drive past the home to confirm the address. There will usually be a lawn sign. You will develop your first impression of the home here.
15. From 8:35 to 8:45, drive the neighborhood to become familiar with it. Notice other houses that are for sale in the neighborhood. Chances are your clients have been through these homes.
16. Park on the street in front of or near the home, not in the driveway. Don't take the only decent parking spot near the house.
17. Turn off your cell phone or set it on a silent mode.
18. Make sure you know the names of buyers and agents.
19. Get your ladders, tools, report forms, checklist, contract, invoice, business cards and seller's letter out of your vehicle. Leave them near the front door. A note about taking notes: Many inspectors use their smartphone and its camera as their main note-taking tool. Photos are fast, easy and more useful than hand written notes. With a good reporting system, the photos can be taken so they drop into the right spot in the report automatically. You can also take private photos for your own records that do not appear in the report.
20. With business card and seller's letter in hand, ring the front doorbell.
21. When the doorbell is answered, follow your seller's script. It might go something like this:

"Good morning, I'm John Smith from ABC Home Inspections." Pause briefly to allow the person answering the door to introduce themselves. If they don't introduce themselves, that's okay. Offer them a business card either way.

"I understand we have an appointment to look at the house this morning." Pause to let them acknowledge this fact. Note: we say **look at the house**, rather than **inspect the house** because the word **inspect** may be intimidating.

"We'll start with the roof and exterior and then come inside in about half an hour if that is all right. The attic will be the last area that we will visit. We'll be roughly two and a half hours altogether. This letter explains the process in more detail." Hand them the seller letter.

“Is there anything you would like me to know about the home before starting?”

Pause to allow them to respond. If they ask what you mean, say something like,

“Is there a dog in the backyard or someone sleeping in the home?” Occasionally, you’ll be given some valuable information about the condition of the property. Be careful not to take it at face value, whether positive or negative.

“Great, I’ll get started on the outside. Thanks very much.”

22. Move your tools near the front door and select those you’ll need for the exterior inspection. This might include a flashlight, electrical tester and your checklist, smartphone or tablet. The buyers and agents will be able to see your ladder and tool bag near the front door and will know that you are on site if they arrive while you are at the back of the home.
23. We recommend you do two exterior tours around the home. Your first tour should be a very quick macro look at the house. Your second tour should be your first micro tour around the house. One tour should be clockwise around the house, and the second should be counterclockwise. You should note where roof access is going to be most practical. Don’t climb fences. You may damage them. Keep an eye and ear out for the agents and buyers. Interrupt your tour when you hear them arrive.
24. Smile as you approach the agents and/or buyers. Look them in the eye.

4.2 The introductory discussion

25. Here’s a sample introductory script,

“Good morning, I’m John Smith from ABC Home Inspections.” Pause so they can introduce themselves. Because you’ve memorized names, you’ll know who the buyers and agents are.

26. If the people who have introduced themselves are the agents or someone else, you can say,

“Will the Bradfords (the buyers) be joining us this morning?” You will get some sort of response. At this point, you can comment on the neighborhood, the weather, their car, etc. You can ask agents how long they have been with XYZ Realty or whether the market has been active, for example.

If the small talk is awkward or the people are not interested in talking, you can say,

“I’ve introduced myself to the people in the home. Perhaps I’ll take a look at the exterior while we’re waiting. Excuse me.”

27. If the people are the buyers, you might say,

“It’s good to meet you, Ms. Green, Mr. Brown.” It’s helpful to use their names so that you do not forget them during the inspection. Eye contact is important.

“Thanks for choosing us to perform your inspection. Have you bought a home before?” Allow them to respond.

“Great. Have you ever had a home inspection?” You’ll only ask this question if they have bought a home before.

“Very good. Our goal over the next two and a half hours is to give you a clear picture of the condition of the major house systems. We’ll focus on the big issues and we’ll come across some minor ones along the way. We’ll include those in the report as a courtesy, but it’s not our goal to prepare a maintenance list. When you move into the home you will come across a number of small issues we did not discuss. That’s part of the joy of home ownership.

We’ll start on the outside and then work inside from the bottom to the top. You’re welcome to come along with me and we can discuss things as we go. I won’t ask you to join me on the roof or in the attic. We’ll prepare the report and give it to you at the end of the inspection. (Or – email it to you by the end of the day.)

This is our inspection agreement which sets out the rules of the game. I understand you had a chance to read and accept it earlier. Please let me know if you have any questions about the inspection process. (Some inspectors ask the client to sign the agreement even if they have accepted online. Some inspectors do not present a copy of or discuss the inspection agreement at the home if it has been accepted online.) If not, I’ll get started on the roof. I’ll catch up to you here in a few minutes. Thank you.” Note: We recommend you get the contract to the client well before the inspection begins. You need to know before you arrive at the inspection whether you have a signed agreement, and whether payment has already been processed.

28. Go up onto the roof and perform the inspection of the roof, chimney, etc.

29. As you come down off the roof, you might say,

“Is everything in order?” Pause to allow them to respond.

“Great, I’ll put that away.” Put the contract in your tool bag.

“Before we start, I should ask if you have any plans for changes to the home.”

Pause to allow them to respond.

“Okay, that’s helpful. Are there any specific concerns you have with the home or is it a general overview you’re looking for?” The general overview part of this question gives them an easy answer. You don’t want to put them on the spot about coming up with specific concerns or make them feel awkward if they don’t have any.

“Very good. Let’s get started with the exterior. The people in the home already know we’re here. Feel free to ask questions as we go. I may defer answering some of them until we get the whole story, but that’s okay.”

4.3 The inspection itself

30. Discuss the roof results, unless the roof is a disaster.
31. If the roof is bad, complete your exterior inspection, going around the property in the opposite direction that you did initially. This will allow you to mix good news and bad and help the clients keep perspective. Clients are usually most nervous at the beginning of the inspection and are most likely to overreact to bad news at the outset.
32. During the exterior inspection, discuss things as you go. Display your knowledge and communication skills on a non-critical issue to break the ice, giving the clients a sense of the inspection flow. This is a good opportunity to establish rapport with the clients.
33. Remember to include the garage or carport as part of the exterior inspection if you can. If you can't get into the garage from outside, you'll have to remember to check the garage when you're inside the home.
34. When you're finished your outside work, summarize the roof and exterior of the home. *"We're all finished outside. Are there any questions before we head on in?"* Pause to allow for a response.
"All right, let's head inside."
35. Knock on the door again so the owner can let you inside, unless the agent leads you into the house directly. If your practice is to remove your shoes or put on indoor shoes, do so as you go in. Bring your tool bag inside and leave your ladder on the front porch, just outside the door unless you're in a neighborhood where the ladder may disappear. (We have had ladders stolen from front porches.)
36. Let the seller know what you're doing, even though you've told them before.
"We're ready to get started inside if that's all right."
37. Follow your typical routine. The order doesn't matter, but we recommend you do things in the same order every time. For example, check the heating and cooling system and summarize the results for your client.
38. Check the electrical system and summarize the results.
39. Check the plumbing system and summarize the results.
40. Check the structure and summarize the results.
41. Now perform your first tour through the interior. Follow your routine on a room by room basis. If you did not get into the garage from the outside, don't forget to include the garage here.
42. Perform your second interior tour which may include your test of the heating or air conditioning distribution system. Summarize your results.

43. Using your ladder, check the attic and, if there is a crawlspace, check it immediately after (assuming you haven't done it already). Put your ladder just inside or just outside the front door when you're finished. Summarize your results of the attic/crawlspace inspection.

4.4 Report preparation

44. On site report delivery: Now say,

"I'm going to take 15 to 30 minutes to put the report together. I'll catch up to you when I'm done and we can review things then." This makes it clear that the client can move through the house freely and puts the responsibility on you to find them. This avoids having the client come back to talk to you before you're ready to speak to them.

Report delivery after the inspection: Now say,

"I'm going to prepare the report and email it to you within 24 hours. Right now, let's summarize the inspection."

In either case, you will probably have been taking notes through the inspection. Again, depending on your reporting system, you may be using your cell phone as your field data collection tool and camera.

4.5 Closing discussion

45. When you're ready, check that the contract was properly signed, if applicable, and go find your clients. You might say,
46. *"Okay, we're all ready. Is this a good spot to summarize?"* This gives the buyer an opportunity to control the location of the closing discussion. If the buyer wants to have the discussion in private, this is his or her opportunity to say so. You have no interest in concealing your discussion from the agents or seller. If they listen in, that's fine with you, as there is less chance of miscommunication.
47. Review your findings in general terms and explain how the report works. Remember, your clients have already heard all of the specifics. Your overview should be a high level summary and should take into consideration the fact that your clients won't grasp everything you've said and will in fact retain very little in a few days.
48. *"Do you have any questions or is there anything we should go over again?"*
Pause to allow them to respond.

49. If they have not yet paid, now is a good time to ask. *“Great. Will you be paying by check?”* Allow them to respond.

“Very good. I’ll prepare the receipt while you do that.” Note: Many inspectors accept credit card payment onsite using a scanner attached to their phone, for example.

They give you the check or process the payment via credit card, and you give them their receipt.

We much prefer having been paid in advance. It avoids having to end the inspection with asking for money. The goal is to build a positive relationship with your client, and having to pay the bill is never the best part of any experience.

“Thanks very much. There you are. There’s a client questionnaire in the front of the report. We would appreciate your mailing it to the office. Please feel free to call if you ever have any questions about the home. We are happy to help and we provide free telephone consultations for as long as you own the home. Thanks again for choosing us to do your home inspection.” Note: Many inspectors use electronic survey tools. You may tell clients that they will be receiving a short survey by email and you would appreciate them filling it out.

50. Also thank the agents and sellers for their patience and cooperation. You should probably be the first one to leave. Don’t linger unless someone has a specific question or comment for you. Make sure you have put everything back as you found it. (Did you turn the thermostat back to its original setting after testing the heating/cooling system?) Gather up your bag.

“Goodbye for now. Thanks again.” And you’re out the door. Put your ladder and tools in your vehicle, ensure you have all your paperwork in order, and you’re finished!

SUMMARY

As you read through this procedure, you may have realized that things may go differently depending on answers that you get to questions and things you may find in the home. We can’t describe every situation, but it’s helpful to have a set routine to deviate from, rather than try to make things up as you go. As we indicated at the outset, you can do different things or do these things in a different order. Just make sure you have a good reason for doing things your way. Feel free to take this outline and customize it to fit your needs.