

# Client onboarding guide for utility projects.

WHERE THE BEST GET BETTER

Prepare the right inputs before site survey. This guide helps your team move from discovery to scope approval with fewer delays.



## SURVEY BOOKING

**24-48 hours**

Scheduling window

## SCOPE BRIEF

**3-5 days**

After inputs

## DELIVERY PLAN

**7-10 days**

With approvals

WHAT TO PREPARE

## Inputs before the survey

### Site information

- Site address and access contact.
- Operating hours and access restrictions.
- Utility room layout or drawings.

### Utility data

- Recent water analysis or lab reports.
- Power bills, tariffs, or peak demand.
- Existing system specs and maintenance logs.

SAMPLE TIMELINE

## What happens next

DISCOVERY CALL

SITE SURVEY

SCOPE BRIEF

PROPOSAL

KICKOFF

CONTACT

## Schedule your survey

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