TRADEFLOW

Heat pump enquiry-to-survey checklist

Five practical steps to give every enquiry an owner, a decision and a clear next action.

1. Capture and assign

- Log every enquiry the day it arrives, whatever channel it came from.
- Give each enquiry a named owner — one person responsible for the next action.
- Record the source, the property type if known, and what the homeowner asked for.

2. Triage without overpromising

- Check the enquiry is in your area and within the work you take on.
- Note anything that needs a technical assessment later — do not confirm suitability at this stage.
- If it is not a fit, say so promptly and politely rather than letting it sit.

3. Confirm the survey

- Agree a specific date and time, and confirm it in writing (email or text).
- Send a reminder before the visit with who is coming and what to expect.
- If the homeowner reschedules, book the new slot before ending the conversation.

4. Prepare the homeowner

- Ask for anything useful in advance: recent energy bills, photos of the current heating system, EPC if available.
- Explain what the survey covers and roughly how long it takes.
- Make clear the survey is an assessment — grant eligibility and system design are confirmed after it, not before.

5. Close the handover

- After the survey, record the outcome and the agreed next step the same day.
- Hand over to quoting with the survey notes attached, so nothing is re-asked.
- Set a follow-up date for every open enquiry — no enquiry without a next action.

Installer worksheet — one per enquiry

Print or copy this block for each new enquiry and fill it in as it progresses.

Homeowner name: _____

Phone / email: _____

Property address & postcode: _____

Enquiry source: _____

Enquiry owner: _____

Date received: _____

Survey date & time: _____

Confirmation sent (date): _____

Reminder sent (date): _____

Survey outcome & next step: _____

Follow-up date: _____

Before the survey:

- [ ] Survey confirmed in writing
- [ ] Reminder sent
- [ ] Energy bills / photos requested
- [ ] Homeowner told what the survey covers

Good to know

This checklist covers the administrative side of handling enquiries. Technical assessment, system design, heat-loss calculations and grant approval are separate steps carried out by qualified people after the survey.

Grant schemes and their requirements change. Check the current official guidance before advising a