

Contractor Selection

CHECKLIST



POTENTIAL CONTRACTOR NAME: _____

№	ACTIVITIES	✓
1	Online Presence? Does their online style and branding match yours?	
2	Interview Past Clients: was the work similar and would they re-hire again?	
3	Check Licenses: Verify credentials are current and applicable to your work.	
4	Review Portfolio: is it current? work matches your needs? Style aligns?	
5	Verify Insurance and Bonds in place: Check insurance and bond coverage.	
6	Response Time: how receptive were they to your request for information?	
7	Initial Call: Pleasant? Listen or talked more? Receptive to your ideas?	
8	Ask about sub-trades and whom they work with: go check these too.	
9	Ask for a blank copy of their contracts to see how fair it is.	
10	Ask them about who will be on site and if employees or subs.	
11	Ask them about warranties, payment terms, clean-up policies	
12	Interview: Check out the back of their truck: clean? Sloppy? Disorganized?	
13	Interview: Do they seem more "salesperson-like" or "contractorish"?	
14	Interview: Do they listen or talk more? (listening is better here)	
15	Interview: Are they taking notes/pictures?	
16	Interview: Are they pushy, want to sign you up today? (red flag)	
17	Once 3-5 potential Contractors selected, ask for bids (may be costs)	
18	Bids: Include every item discussed including specific brands, models, etc.?	
19	Bids: If "Flat" bid, does it describe payment structure?	
20	Bids: If "Cost-Plus" bid, does it outline the markup rate structure and billing?	
21	Bids: Does it outline timelines and potential start dates?	