

BUSINESS RESOURCE

Small Business Job Completion Checklist

A practical close-out sheet for confirming scope, quality, handover, invoicing, payment and outstanding actions.

JOB / REFERENCE

CUSTOMER

COMPLETION DATE

RESPONSIBLE PERSON

Agreed scope

- ☐ Compare the completed work with the quotation/specification.
- ☐ Check approved variations and additional work.
- ☐ Record exclusions, incomplete items or customer-supplied elements.
- ☐ Keep the current agreed scope with the job file.

Final quality check

- ☐ Inspect completed work.
- ☐ Take appropriate final photographs.
- ☐ Test relevant items or systems where applicable.
- ☐ Record defects, snagging or remedial actions with an owner and date.

Handover

- ☐ Provide relevant certificates, manuals or warranties.
- ☐ Hand over keys, access information or customer documents securely.
- ☐ Provide safety or maintenance information where applicable.
- ☐ Record what was supplied and when.

Customer acknowledgement

- ☐ Record completion or handover in an appropriate form.
- ☐ List unresolved items openly rather than hiding them.
- ☐ Keep customer messages or signed records connected to the job file.

Financial close-out

- ☐ Issue the correct final invoice or credit.
- ☐ Record deposits, variations and amounts already received.
- ☐ Record balance due and payment status.

- ☐ Set follow-up for outstanding payment or documents.

Archive and review

- ☐ Close or assign remaining tasks.
- ☐ Apply the business retention policy.
- ☐ Restrict sensitive information appropriately.
- ☐ Record lessons or recurring issues that should improve future jobs.

Use with the full guide

This checklist supports record keeping; it does not determine contractual rights, tax treatment, debt validity or legal liability. Obtain professional advice where needed.

Guide: first-notification.com/guides/business/job-completion-checklist-for-small-businesses/