

Window Round Sheet

One sheet a round. Write the cycle at the top: it is the number every question a customer asks is answered from.

ROUND OR DAY

WEEK COMMENCING (MONDAY)

CYCLE, IN WEEKS

CLEANER WORKING IT

LAST TIME ROUND, DATE

What the round sheet has to carry

A sheet answering fewer than these is a sheet somebody has to ring you about from the doorstep.

- ☐ The cycle in weeks, written once at the top, not remembered
- ☐ Every customer in the order the round is actually worked, not alphabetically
- ☐ The address, and the bit of it that matters: the side gate, the alley, the third house with no number
- ☐ What is in scope: fronts only, front and back, frames and sills, conservatory roof
- ☐ The price, so nobody has to ring you to ask what a house costs
- ☐ How they pay: cash on the day, bank transfer, or a standing order that arrives whatever you do
- ☐ Access: the gate code, the dog, where the tap is, which neighbour holds a key
- ☐ Anything that stops the job: parked cars, a locked gate, scaffolding, a conservatory nobody mentioned
- ☐ A done column and a paid column, because they are two different questions

Before you set off

Two minutes on the van, and the day does not end early.

- ☐ Enough water in the tank for the whole round, not most of it
- ☐ Poles and hoses checked, and the ladder if there is one on the van
- ☐ Ladder feet, stiles and rungs looked at rather than glanced at
- ☐ Yesterday's skipped customers carried onto today's sheet
- ☐ Anybody who asked to be moved, moved, and told
- ☐ The first customer of the day knows you are coming, if they asked to know

When a customer is not done

The single most useful column on the sheet, and the one most round books do not have.

- ☐ Why: nobody in, gate locked, car on the drive, weather, van off the road
- ☐ Whether the visit is being caught up this cycle or carried to the next

- ☐ Whether the customer was told, and how
- ☐ Whether this is the second time in a row, which is the point a customer starts looking elsewhere
- ☐ Whether they have asked to stop, which is a different thing from a skip and belongs off the round

The round

One row a customer, in the order you work them. Tick the done column on the day and the paid column when the money is actually in.

[illegible]

Skipped, and why

Everything not done, with the reason. Two in a row against the same name is a customer about to be lost.

DATE	CUSTOMER	WHY NOT DONE	TOLD THEM	CATCHING UP OR NEXT CYCLE
02/03	C. Customer	Gate locked, nobody in	Card through door	Next cycle

DATE	CUSTOMER	WHY NOT DONE	TOLD THEM	CATCHING UP OR NEXT CYCLE

Money collected

What actually came in on the round, and when it was banked. The paid column above says whether; this says what.

DATE	CUSTOMER	AMOUNT	CASH, BANK OR CARD	BANKED ON
02/03	A. Customer	£18	Cash	

Work at height is the defining hazard of this trade and the Work at Height Regulations 2005 apply to anybody who employs somebody to do it. Ladders are not banned: they are allowed for short-duration work where a safer option is not reasonably practicable, and the decision has to be a written risk assessment rather than a habit.

This sheet carries customers' names, addresses, access arrangements and what they pay, which makes it personal data under the UK GDPR the moment it exists. A round book left on a van seat is a data breach as well as a lost day. Keep it out of sight, do not keep customers on it who have left, and do not photograph it into a group chat.

A round sheet is not an invoice and does not satisfy HMRC on its own. Cash written in this column still has to reach your records; the paid column is a working note, not a receipt.