

YOUR LOGO HERE

FROM THE LAST-MILE OPERATOR'S PLAYBOOK

The Hauler Expectations & Operations Handbook

A complete day-one onboarding packet for a heavy & bulky delivery crew. It is written to be read aloud in a morning meeting or studied in a truck cab.

This document is yours to brand. Replace the highlighted fields below, drop your logo in the space at the top of this page, print it, and hand it to every crew member before their first route. Every field is tinted in the body so you can page through and catch them all.

Field	Appears	Replace with
[COMPANY NAME]	7 times	Your legal or trading name
[DISPATCH PHONE]	4 times	The number a crew calls from a stop
[NAME]	4 times	The crew member or manager's name
[RETAILER]	4 times	The program or retailer for this route
[ITEM]	3 times	Left as-is: it is filled in on the day
[CUSTOMER NAME]	1 time	Left as-is: it is filled in on the day

All dollar figures in this handbook are illustrative. Set your own. Regulations vary by jurisdiction and change; verify current requirements before relying on any procedure here.

Section 1: Welcome & How We Operate

Welcome to **[COMPANY NAME]**.

Here is the one thing you need to understand about this business, because everything else in this handbook flows from it:

We do not get paid to move boxes. We get paid because homeowners trust us inside their homes.

Anybody with a truck can carry a refrigerator. The retailer isn't paying us for muscle. They're paying us to take a \$2,000 appliance or a \$4,000 sectional across the last fifty feet, through a door, up a staircase, past a wall of family photos, and leave the customer happier than we found them. That last fifty feet is where everything goes wrong in this industry: scratched floors, dented doors, flooded laundry rooms, angry one-star reviews. Our entire company exists because we go where the risk is and we control it.

That means three things for you, every stop, every day:

1. **You are the company.** The customer will never meet our owner, our dispatcher, or the retailer's buyer. They meet you. For the twenty to forty minutes you're in that home, you *are* **[COMPANY NAME]**, and you are also the retailer whose name is on the box.
2. **Damage avoidance is the job.** A perfect delivery that scratches a hardwood floor is not a perfect delivery. It's a claim, a chargeback, and a customer who tells ten neighbors. We would rather you take five extra minutes laying floor protection than save five minutes and roll the dice.
3. **When something goes sideways, you don't guess. You document and you call.** Exceptions are where money is made or lost. Section 7 gives you the exact formula. Learn it cold.

Do the job the way this handbook describes and you will rarely have a bad day. Cut corners and the corners will find you.

Section 2: Code of Conduct

You are a guest in someone's home. Act like the best guest they've ever had.

In-Home Behavior

- Knock or ring once, step back from the door, and wait. Never pound, never ring repeatedly.
- Enter only when invited, and only the rooms required to do the job.
- Shoe covers on before you cross the threshold, every home, every time, even if the customer says "don't worry about it." Say: "It's our policy, ma'am, takes me two seconds."
- Do not use the customer's bathroom unless invited and it's genuinely necessary. Plan your day.
- Do not accept food or drinks beyond water. Do not sit on the customer's furniture.
- Do not touch, move, or comment on anything in the home that isn't part of the job. If something must be moved to clear a path, ask the customer to move it or ask permission before you touch it.

- Never be alone with a child. If only a minor is home, do not enter. Call dispatch (see Section 7, not-at-home protocol).

Zero-Tolerance Items (immediate removal from all routes)

- Theft of any kind, any value. This includes "trash" and haul-away items the customer didn't offer.
- Being under the influence of alcohol or drugs, or possessing either on a route.
- Any weapon on a route, in the truck, or on your person.
- Physical or verbal aggression toward a customer, teammate, or anyone at a dock.
- Harassment of any kind: sexual, racial, religious, any of it. One incident. Done.
- Photographing or filming customers, their family members, or the inside of their home for any purpose other than required delivery documentation.
- Soliciting side work, tips-for-service-upgrades, or cash deals from customers.
- Falsifying a POD: signing for the customer, staging photos, marking work complete that wasn't done. This is fraud. It ends employment and can end in prosecution.

Substance Policy

- Zero alcohol or impairing substances within 8 hours of a shift or at any time during one. This includes marijuana regardless of state legality. You are operating commercial vehicles and working in customers' homes.
- Prescription medications that carry drowsiness warnings must be reported to your supervisor before driving.
- We conduct pre-employment, post-accident, reasonable-suspicion, and random screening per company policy and DOT requirements where applicable.

Customer Interaction Rules

- Address customers as sir, ma'am, Mr., or Ms. until invited otherwise.
- No profanity: not to the customer, not to your teammate within earshot, not on the phone.
- No comments on the customer's home, belongings, neighborhood, family, or purchases beyond polite professional remarks ("That's a good machine. We deliver a lot of these.").
- No politics, no religion, no gossip about the retailer or other customers.
- Never argue with a customer. If you disagree about scope, damage, or anything else: "Let me get my dispatcher on the phone so we can sort this out for you." Then do it.
- Tips: you may accept an unsolicited tip graciously. You may never hint, ask, or trade.

Phone & Social Media in the Home

- Your phone is a work tool inside the customer's home: photos, POD, dispatch calls. Nothing else.
- No personal calls, texting, or scrolling inside the home or on the customer's property.
- No earbuds/headphones inside the home. You need to hear the customer and your teammate.

- Never post customer homes, addresses, deliveries, or interactions on social media. A funny story with an address visible in the background is a fireable offense and a potential lawsuit.

Section 3: Professional Appearance Standards

The customer decides whether to trust you in the first ten seconds at the door. Look the part.

Uniform

- Company-issued shirt (or approved retailer-branded shirt), clean and untorn, tucked in or squared at the waist.
- Work pants or work shorts per season policy: no sweatpants, no cutoffs, no visible undergarments.
- Closed-toe, slip-resistant work boots or shoes. Steel/composite toe strongly recommended, required where the retailer program specifies.
- Company jacket or approved plain outerwear in cold weather. No hoodies with third-party logos or slogans.
- Gloves on for carrying; off for paperwork and the door interaction.

Badge & Identification

- Company photo ID badge worn visibly (chest height) at every stop. Retailer badge too, where the program issues one.
- Present your badge at the door without being asked: "Good morning, [NAME] with [COMPANY NAME], here with your delivery from [RETAILER]."

Grooming

- Clean and showered at the start of every shift. You will be working hard, close to customers, in their homes.
- Hair and facial hair neat. No specific style requirements, just kept.
- No cologne or fragrance heavy enough to notice from three feet.
- Visible tattoos are fine unless they contain profanity, hate imagery, or content a reasonable customer would find threatening. Those must be covered.

Truck Presentation

- Exterior washed weekly minimum; no visible body damage left unreported.
- Cab free of trash, food waste, and personal clutter. Customers see inside when you open the door.
- Box organized: blankets folded or hung, straps coiled, equipment secured. A messy box damages freight and looks like a company that damages freight.
- No smoking or vaping in the truck, ever. The smell transfers to blankets, and blankets transfer it to a customer's new mattress.

Section 4: The 12 Steps to a Perfect Delivery

This is the core field procedure. Twelve steps, every stop, in order. When crews skip steps, claims happen. When they don't, they don't.

Step 1: Dock Prep

- Arrive at the dock/warehouse at your assigned window. Clock in, check the board, get your route.
- Inspect your truck: walk-around, liftgate function, straps, blanket count (24 minimum, see Appendix B), floor runners, tools, consumables tote.
- Fuel, DVIR (driver vehicle inspection report), and any dispatch notes on today's stops: flagged customers, known access issues, COD or special instructions.

Step 2: Manifest Check

- Match every piece on your manifest to a physical piece before it goes on the truck. Model number and serial where applicable, not just "a white washer."
- Count boxes per line item. A sectional is not one piece; it's three to five. A bed is a headboard, footboard, rails, and slats. Missing one box at the dock is a five-minute fix; discovering it at the customer's house is a failed stop.
- Verify install kits and accessories are physically present: hoses, cords, vent kits, anti-tip brackets, hardware bags. If the manifest says "with install" and there's no cord, flag it now.

Step 3: Load-Out Damage Inspection (with photos)

- Inspect every carton before loading: crushed corners, punctures, water stains, retape, concealed-damage indicators (tip sensors, shock labels if used).
- **Photograph any carton damage before it goes on the truck** and note it on the manifest/app. This photo is what separates "warehouse damage" from "your damage" when the claim comes. No photo, and it's yours.
- Suspicious carton on a high-value piece? Open and inspect at the dock with a warehouse rep if the program allows. Better a dock exception than a living-room discovery.

Step 4: Route Load Order

- Load in reverse stop order: last stop deepest, first stop at the door. Re-handling freight in a truck box is where in-transit damage happens.
- Heavy on the bottom and against the walls, decked and strapped. Appliances upright, strapped high and low. Never lay a refrigerator down without dispatch approval (and if you must, note it: compressor oil migration is real; it needs stand time before power-on).
- Blanket-wrap or keep cartoned every furniture piece. Nothing rides unprotected. Nothing leans on a finished surface.
- Mattresses bagged, on edge, strapped, never flat under other freight.

Step 5: The 30-Minute Pre-Call

Call the customer 30 minutes out, every stop. This one call prevents half of all failed deliveries. Use this script, verbatim until it's natural:

"Hi, this is [NAME] with [COMPANY NAME], delivering your [ITEM] from [RETAILER]. We're about 30 minutes away. Does that still work for you? Great. Two quick things so we're fast and careful when we arrive: first, is there anything about parking or getting to your door we should know? Second, can you make sure the path from the door to the room is clear, and any pets are put away? [If appliance:] One more thing: do you know where your water shut-off / gas shut-off is? We'll need access to it. Perfect. See you in about 30 minutes."

- No answer? Text using the company template, wait 5 minutes, call once more. Still nothing: call dispatch **before** driving to the stop if it's significantly off-route. Otherwise proceed and follow the not-at-home protocol (Section 7).

Step 6: Arrival & Parking

- Park legally, on the street where possible. Never block the customer's driveway without permission; never park on the lawn; never block neighbors.
- Watch for low branches, basketball hoops, and overhead wires with the box truck. Check clearance before pulling in anywhere.
- Set the parking brake, cones out if you're on a street, liftgate area clear before it comes down.
- Take a quick photo of the truck position at difficult-access stops. It documents that you did it right.

Step 7: The 5-Step Door Interaction

At the door, in this order, verbatim:

1. **Identify:** "Good morning/afternoon, I'm [NAME] with [COMPANY NAME]" (badge visible, one step back from the door).
2. **Confirm:** "We have your delivery from [RETAILER], a [ITEM]. Are you [CUSTOMER NAME]?"
3. **Set scope:** "Here's what we'll be doing today: [we'll bring it in, install it/assemble it/place it in your room of choice, test it, and take the old one/packaging with us]. Does that match what you're expecting?"
If the customer's expectation doesn't match your work order, stop and call dispatch before bringing anything in.
4. **Ask:** "Which room is it going to? And before we start, is there anything in the home we should be extra careful with?"
5. **Walk:** "Great, let's walk the path together before we bring anything in."

Step 8: Path Walk & Measurement

- Walk the full path from truck to final placement with the customer, empty-handed, before any freight moves.

- Measure anything that looks tight: door widths, hallway turns, stair winders, railings, low ceilings at landings. A standard refrigerator needs roughly 33–36 inches; most sofas need 32+ inches or a vertical/diagonal maneuver plan. Measure. Don't eyeball.
- Identify what must be protected or moved: pictures on stair walls, light fixtures, thermostats, banisters, that vase on the console table. Ask the customer to move small valuables themselves.
- Decide the maneuver plan out loud with your teammate before lifting: who leads, where you pivot, where you rest.
- If it won't fit, it won't fit. That's a no-fit exception (Section 7), not a "let's force it and see."

Step 9: Protection Setup

- Floor runners on the full path across any finished flooring: hardwood, tile, LVP, carpet in a light color. Door to placement point, no gaps.
- Jamb protectors on the entry door and any tight interior doorway on the path.
- Stair guards / rail covers on banisters where the piece will pass close.
- Corner protection on wall corners at tight turns.
- Shoe covers on any crew member who steps off the runner path.
- This takes five minutes. The claim it prevents takes five weeks. Non-negotiable.

Step 10: Execute the Scope

- Unbox outside or in the garage when weather and space allow. Cardboard and staples don't belong in living rooms.
- **Inspect the product with the customer before install/placement begins.** Walk them around it: "Take a look with me, everything look good?" Damage found now, still in the carton or fresh out of it, is a clean exception. Damage "found" after you leave is a fight.
- Perform the full scope per work order: installation procedures in Section 5, furniture procedures in Section 6.
- **Test everything that can be tested and inspect everything that can be inspected, with the customer watching.** A washer runs a fill cycle. A refrigerator hums and the water dispenser flows. A bed frame gets a firm shake. A recliner reclines.
- Never leave a gas connection untested, a water connection unchecked for drips (five-minute soak test minimum), or an anti-tip bracket uninstalled (Section 5).

Step 11: Cleanup & Debris

- All packaging leaves with you if the scope includes debris removal (it almost always does on install and white-glove work). Cardboard, foam, straps, bolt bags, the works.
- Sweep or wipe any mess you made. Roll up your runners last so you never walk grime back across the floor.
- Haul-away items (old appliance/mattress) loaded per Section 5/6 rules, photographed on the truck.
- Final look at the room and the path: is it as clean or cleaner than when you arrived?

Step 12: Proof of Delivery (POD)

The POD is your shield. A complete POD ends most claims before they start.

- **Photos (minimum set):** product installed/placed in final position; connections (hoses, vents, anti-tip bracket installed); serial/model plate; the delivery path after runner removal (proving no floor damage); any exception or pre-existing condition noted.
- **Signature:** customer signs on device or paper. Before they sign, say: "This confirms we delivered and [installed/assembled] your **[ITEM]**, everything's working, and the home is as we found it. Any concerns before you sign?"
- **Notes:** anything non-standard, in plain language: "Customer requested placement against non-preferred wall, approved verbally." "Pre-existing scratch on entry door photographed." "Old dryer hauled away."
- Customer refuses to sign? Do not argue. Photograph everything, note "customer declined signature," and call dispatch before you leave the driveway.
- POD complete before wheels roll. Not at the next stop. Not tonight. Now.

Section 5: Installation Procedures by Appliance

General rules first, then by machine. **The always-replace-consumables rule: every install gets new hoses, new connectors, new vent, new cord where applicable. We never reuse the customer's old fill hoses, old flex vent, or old cords. Ever.** The old ones are the age of the old machine, and a burst hose floods a house at 500+ gallons a day. The \$15–45 in parts is built into the rate. (Illustrative. Set your own.)

Also universal:

- Confirm the utility exists and works *before* uncrating the new unit: outlet, water valve, drain, gas valve, vent path.
- Level every appliance, every time. Front-to-back and side-to-side. Bring your level; don't guess.
- If any part of an install requires modifying the home's plumbing, electrical, or gas piping, that's out of scope. Stop, use the exception formula (Section 7).
- Haul-away refrigerators, freezers, and window AC units ride intact to our recovery partner. Never cut lines, never vent refrigerant. Recovery is done by EPA-certified technicians at the facility, and venting is a federal violation.

Washer

1. Shut water off at the valves; check valves turn freely (corroded/frozen valve » Section 7, never force).
2. Remove old unit if haul-away; cap or drain old hoses over a bucket, not the floor.
3. **Remove shipping bolts from the new washer's rear panel: all of them.** A washer run with shipping bolts in will destroy itself on the first spin. Show the removed bolts to the customer, leave them in a labeled bag.

4. Install new stainless braided fill hoses: hot to hot, cold to cold (hot is left valve, red mark). Hand-tight plus a quarter turn; new rubber washers seated.
5. Drain hose into standpipe or tub, secured, inserted no more than ~6 inches (siphon risk beyond that).
6. Slide in on protection, level all four feet, lock feet.
7. **Test: run a fill/drain cycle. Watch every connection for the full test. Soak-check with dry fingers, not eyes.**

Electric Dryer

1. Verify outlet type: 3-prong vs 4-prong. Install the matching new cord. This is an appliance cord swap, not house wiring, and it's in scope. If the outlet itself is damaged, scorched, or loose in the wall: out of scope, exception.
2. **New rigid or semi-rigid metal vent, always.** Remove and discard plastic/foil flex vent. It's a lint fire waiting to happen and against code most places. Shortest run, fewest bends, clamped not screwed (screws catch lint).
3. Clean visible lint from the wall duct opening while it's exposed.
4. Level, push back without crushing the vent.
5. **Test: run on air/heat cycle, confirm heat at the door, confirm airflow at the exterior vent flap if reachable.**

Gas Dryer: Licensed Only, Where Permitted

Gas connections are performed only by crew members holding the license/qualification your state or locality requires, and only where our retailer program and insurance permit gas work. If you are not gas-qualified: you may place the dryer, but the connection is an exception. Call dispatch. Never connect gas "as a favor."

For qualified installers:

1. Confirm shut-off valve exists within reach of the connector and operates. No valve or frozen valve » exception.
2. New CSA-approved stainless gas connector, correct length, no old connector reuse, no connector-through-wall runs.
3. Pipe dope or gas-rated tape on NPT threads only, never on flare fittings.
4. Open valve, **leak-test every joint with electronic detector AND bubble solution.** Both. Every time.
5. New metal vent per electric dryer procedure.
6. Test: run on heat, confirm ignition, re-check joints after the unit has run.

Refrigerator (with Water Line)

1. Measure the path first. Fridges are the #1 no-fit item. Doors, handles, and hinges can come off to gain 2–4 inches; that is in scope. Removing the customer's house door from its hinges is allowed with permission; trim removal is not.

2. If the unit was transported on its side (should be never, but document if so): stand upright for the manufacturer-specified time before plugging in. When in doubt, 4 hours.
3. Water line: connect to existing, functional shut-off valve with the new supply line from the kit. **No saddle valves. If the home has a self-piercing saddle valve, we do not connect to it; that's an exception.** No valve at all: place, plug in, exception for the water line.
4. Route the line with a service loop so the fridge can roll out; no kinks, no pinch under the unit.
5. Level with a slight backward tilt per spec so doors self-close; align doors.
6. **Test: unit powers on, compressor runs, dispenser flows (run 1–2 quarts through to purge), check the valve connection for drips after 5 minutes. Tell the customer: discard first ice/water per manufacturer guidance, allow 24 hours to reach temp.**

Range (Electric) + Anti-Tip Bracket

The anti-tip bracket is mandatory on every freestanding range install. No exceptions, no customer waivers. CPSC and the manufacturer require it because children have been killed by tipping ranges. A child standing on an open oven door will bring an unbraced range over. If you cannot install the bracket (masonry you can't drill, customer refuses to allow it), the install is incomplete: exception, document, dispatch.

1. Verify outlet (typically 240V/4-wire in newer homes); install correct new cord on the range per outlet type.
2. Install anti-tip bracket per template into wall stud or floor per kit instructions.
3. Slide range in, **confirm the rear leveling foot engages the bracket: pull-test the range by tilting the front; it should stop.**
4. Level, verify burners and oven elements heat.
5. **Photograph the engaged bracket for the POD.** Gas ranges: gas-qualified crew only, per gas dryer rules, plus bracket, plus leak test.

Freezer (Upright/Chest)

1. Confirm the outlet is a dedicated, grounded circuit where the manual requires it; never plug into an extension cord or power strip. If that's all that exists, plug-in is an exception.
2. Placement per customer; check garage-rated requirements if it's going in an unconditioned space (note in POD if the customer insists on a non-rated location).
3. Stand time before power if transported on its side.
4. Level, gasket check (dollar-bill pull test on the seal), confirm it powers and starts cooling.
5. Remind the customer: 4–24 hours to temperature before loading food.

Not in Scope (all crews, all programs unless your work order explicitly says otherwise)

Dishwashers, over-the-range microwaves, wall ovens, cooktops, garbage disposals, and anything requiring hard plumbing, hard wiring, or carpentry. These are licensed-trade installs. Place and go per work order, or exception.

Section 6: Furniture Assembly & Placement Procedures

Service Tiers: Know Which One You're Delivering

- **Threshold:** across the first doorway (garage or front room), in the carton. No unboxing, no placement, no debris removal. In-home path rules still apply for the few feet you're inside.
- **Room of Choice:** carried to the customer's chosen room, including stairs per work order. Typically still cartoned; unbox only if the order says so.
- **White Glove:** room of choice + full unboxing + assembly + placement + debris removal. This is our flagship service and where our margin lives. Everything in Steps 7–12 applies at full strength.

Never silently upgrade or downgrade a tier. Customer bought threshold but wants it upstairs? That's a scope change: dispatch call, and either an authorized paid upgrade or a polite no. "Free upgrades" become the expected standard and destroy pricing. An unauthorized stair carry is also an unpriced injury and damage risk.

Bed Frames & Platform Beds

1. Unbox in the room or hallway on blankets; hardware bag opened over a towel (bolts on hardwood scatter and dent).
2. Sort and count hardware against the instruction sheet **before** starting. Missing hardware » exception before assembly, not after.
3. Assemble per instructions: headboard to rails, footboard, center support legs (never skip center legs on queen and up: the frame will fail and it becomes our claim).
4. Torque check every bolt at the end; firm shake test at two corners.
5. Position per customer, felt sliders under feet on hard floors.

Sectionals

1. Confirm the configuration against the order **before** unboxing: left-arm-facing vs right-arm-facing is determined standing facing the sofa. Wrong-chirality sectionals are a top return driver. Catch it in the carton.
2. Path-check the largest single piece before unboxing anything.
3. Unbox, inspect each piece with the customer (seams, legs, mechanism on recline pieces).
4. Install legs where shipped separately; connect the sectional joining brackets/clips.
5. Test recline/sleeper mechanisms through a full cycle. Place on sliders, square to the room, customer approval on final position, then take a placement photo.

Case Goods (Dressers, Bookcases, Cabinets) + STURDY Act

1. Inspect finish panel-by-panel with the customer at unbox. Case goods carry the most subjective cosmetic-damage disputes in furniture. Photo anything even borderline, note it, and let dispatch and the customer decide (Section 7).
2. Assemble per instructions where flat-packed; drawer glides checked through full extension.

3. **Anchoring offer (make it every time):** "This piece ships with a wall anti-tip strap, under the federal STURDY stability standard for clothing storage units. We're happy to anchor it to the wall for you right now. Would you like us to?"

- Customer says yes » anchor into a stud per the kit, pull-test, photo for POD.
 - Customer says no » "No problem, I do have to note on the delivery record that anchoring was offered and declined. The strap and instructions are in the top drawer." Note it, POD it. This one note protects the company if a tip-over ever happens.
1. Level on its feet; doors and drawers aligned before you call it done.

Dining Sets

1. Table assembled upside-down on blankets, never on bare floor. Legs torqued, then flipped with two people minimum (tabletops crack from one-person flips).
2. Check the top for wobble and level; adjust feet.
3. Chairs: hardware fully seated, then the sit test: you, gently, before the customer. A collapsing chair is an injury claim.
4. Felt pads on every chair foot on hard flooring, from your consumables tote if not included.

Mattress Setup & Old-Mattress Handling

1. New mattress stays in its bag until it's in the room. Never drag; never fold a mattress that isn't a roll-pack; never carry a mattress flat across your head outdoors in wind.
2. Place on foundation/frame, square, remove bag, inspect with customer.
3. **Old mattress rules:**
 - Haul-away only if it's on the work order (1-for-1: one old out per new in).
 - **Refusal conditions, we do not load:** visible insect/bedbug evidence, biohazard staining (blood, urine soak-through), or soaking wet. Say it kindly and firmly: "I'm sorry, company health policy doesn't allow this one on the truck with new product. Here's what I can offer..." then Section 7 exception, dispatch call, note and photo.
 - Old mattress goes into a **used-mattress bag before it enters the truck**. It never rides bare next to new freight.
 - **State recycling laws:** in California, Connecticut, Rhode Island, and Oregon, collected mattresses must flow through the state mattress-recycling program. They go back to the designated recycling point per dispatch instructions, not the dumpster. If you run in those states, your return-to point is on your route sheet. Landfilling a program mattress is a compliance violation, not a shortcut.

Section 7: The Universal Exception Formula

An "exception" is any stop that can't be completed exactly as ordered. Exceptions are not failures. *Unmanaged* exceptions are failures. Every exception, no matter what kind, follows the same five moves:

PHOTOS » NOTES » DISPATCH CALL » CUSTOMER OPTIONS » DOCUMENT THE DECISION

1. **Photos.** Shoot it before you touch anything else. The damage, the doorway that's too small, the corroded valve, the empty driveway.
2. **Notes.** Plain language in the app/manifest: what you found, when, who was present.
3. **Dispatch call.** From the stop, not from the road after. Dispatch owns the decision; you own the information.
4. **Customer options.** Present the choices dispatch authorizes: never invent options, never promise refunds, credits, or return trips on your own authority.
5. **Document the decision.** Who chose what, in the POD notes, with the customer's acknowledgment where possible.

Quick Scripts by Scenario

Not at home (NAH). Knock/ring, call, text, wait the full window per program (typically 10–15 minutes), photo of the front door with house number visible + timestamp, door tag if used. Dispatch call before leaving. Note attempt details. Never leave freight unattended without explicit dispatch + program authorization.

Voicemail script: "Hi, this is [NAME] with [COMPANY NAME]. We're at your home for your [RETAILER] delivery. We'll wait a few more minutes. Please call [DISPATCH PHONE] to reschedule if we miss you."

No-fit. Measured, walked, tried the reasonable options (door off hinges, handles off, alternate entrance). It does not fit. Photos of the measured obstruction with tape in frame. Dispatch call. Customer options usually: alternate room, alternate entrance at customer's arrangement (e.g., window/balcony service is NOT ours to offer), or return.

"Sir, we've measured twice, it's [X] inches and the turn gives us [Y]. Forcing it will damage your home or the piece, and I won't do that to you. Let me get my dispatcher and we'll walk through your options."

Damage found (at unbox/inspection). Stop immediately. Photos: overall, close-up, carton condition, serial plate. Do NOT complete the install of a damaged unit unless dispatch and the customer both agree (functional unit, cosmetic blemish, customer accepts, sometimes with a retailer concession dispatch arranges).

"I want you to see this before we go any further. Here's what we found. Let me call my dispatcher right now and we'll get you options. You won't have to chase anyone."

Haul-away refused (by us). Bedbugs/biohazard/sopping wet, or item not on the order, or not 1-for-1. Kind, firm, photo, dispatch, note.

No shut-off valve. Place and complete everything except the connection. "Your home doesn't have a shut-off valve here, and code and safety don't let us connect without one. A plumber can add one inexpensively. Once it's in, [DISPATCH PHONE] can schedule the hook-up." Photo the location, note, dispatch.

Corroded/frozen valve: NEVER FORCE. A forced valve that snaps floods the house on our watch. This is the single most expensive mistake a crew can make. If it doesn't turn with normal hand pressure: stop.

"This valve hasn't moved in years and if I force it and it breaks, water goes everywhere. I'm not going to risk your home. Here's what we can do..." Complete everything but the connection, photo, note, dispatch.

Missing parts/hardware. Verify against the packing list, photo the hardware bag/sheet, dispatch call for parts order vs. return decision. Never cannibalize parts from another stop's freight. Never hardware-store-run without dispatch authorization.

Customer refusal (remorse/changed mind). Wrong color, "bigger than I thought," spouse said no. No argument, no persuasion beyond one gentle scope confirmation. Photos of the product condition **before it goes back on the truck** (protect against "they damaged it on the return"), dispatch call, refusal reason verbatim in notes, customer acknowledgment.

Section 8: Customer Service Standards

What We Say / What We Never Say

Say this	Never say this
"Let me check with my dispatcher and get you a real answer."	"That's not my problem / not my job."
"Here's what I can do for you."	"There's nothing I can do."
"I understand, I'd be frustrated too. Here's the next step."	"Calm down."
"The retailer's team handles that, and here's the number that gets you a human."	"The retailer always messes this up." / any badmouthing of the retailer, warehouse, or another crew
"We found an issue and I want you to see it before we go further."	Hiding, minimizing, or "they'll never notice."
"It's our policy, takes me two seconds." (shoe covers, runners)	"You sure? It's really no big deal."
"I'm not able to promise that, but dispatch can tell you exactly what's possible."	Any promise of refunds, discounts, credits, or return-visit dates you can't personally guarantee.

Complaint De-escalation: L.A.S.T.

- **Listen.** Fully. Don't interrupt, don't defend, take a note in front of them.
- **Apologize** for the experience, not fault: "I'm sorry this has been a hassle, that's not how this is supposed to go."
- **Solve** what's yours to solve, right now, on the spot.
- **Transfer** what isn't: dispatch on the phone before you leave, warm hand-off, customer hears you set it up.

An angry customer with a crew that stays calm and gets dispatch on the line within two minutes almost always de-escalates. An angry customer who watches the truck drive away calls the retailer, and now it's a chargeback with a narrative.

The Customer's-House-Rules List

Their home, their rules, even when the rule is inconvenient:

- Shoes/shoe covers preference (we default to covers regardless).
 - No-go rooms and areas. Don't wander.
 - Pets: their handling plan governs, our safety rules still apply (Section 9).
 - Noise: keep voices down; someone may be sleeping, working, or on a call.
 - Thermostat, lights, doors: leave everything exactly as found; close what was closed.
 - Religious or cultural household customs: follow them without commentary.
 - If a house rule prevents the job (e.g., "you can't use the stairs"), that's an exception, not an argument.
-

Section 9: Safety

Nobody's furniture is worth your back, and no delivery window is worth a fall.

Lifting

- Two-person lift on anything over ~75 lbs, awkward, or taller than chest height. No hero lifts.
- Load close to the body, lift with legs, no twisting under load, pivot with feet.
- Team lifts on a count, called by the person moving backward.
- Straps (shoulder dollies/forearm straps) for appliances and case goods; hand truck with stair-climber capability for stairs where fitted.

Stairs

- Walk stairs empty first. Check tread condition, lighting, railing solidity, overhead clearance at turns.
- Heavier crew member on the downhill side. Downhill person sets the pace and calls the steps.
- Rest at landings, never mid-flight. Never on a step you can't hold for thirty seconds.
- Wet, icy, or broken exterior stairs: stop, assess, salt/dry what you can, or exception. A carried fall on a bad stair is our worst injury profile.

Liftgate

- Nobody rides the gate with freight, ever. One operator, hands on controls, teammate clear.
- Gate fully up or fully down when loading across it, never bridge a half-raised gate.
- Load centered, wheels locked/chocked on wheeled items, hand on the piece through the whole cycle.
- Gate stowed and locked before the truck moves. Every time. A deployed gate at 40 mph is a catastrophe.

Weather

- Rain: extra runners, towel at the threshold, slower carries, mattresses and boxed electronics double-covered.
- Ice/snow: assess every walkway before carrying. You may salt a path with customer permission (bag in the truck). If footing can't be made safe: weather abort exception, dispatch call. Dispatch will always back a safety abort.
- Heat: hydrate on a schedule, not on thirst; rotate the heavy end between teammates; watch each other for confusion or wobbling. Those are heat-emergency signs, stop immediately.
- Lightning: no liftgate/no carries during active lightning. Wait it out in the cab.

Dog-at-Door Protocol

- Pre-call asks about pets; door interaction confirms: "Before we prop this door open, any pets we should know about?"
- All dogs are secured (room, crate, or leash held by an adult) before freight moves. Every dog. "He's friendly" is what every owner says, including the ones whose dogs bite. Say: "He looks like a good one, it's for his safety too, with the door propped and heavy stuff moving."
- Dog will not be secured? We don't enter. Exception, dispatch, note. No exceptions to this rule for any breed or size.
- Loose aggressive dog on approach: stay in the truck, call the customer, then dispatch.

Section 10: Quick Reference Card

(Print this page, laminate it, one per crew member, one taped in each cab.)

THE 12 STEPS

1. Dock prep · 2. Manifest check · 3. Load-out inspection + photos · 4. Load in reverse stop order · 5. 30-minute pre-call · 6. Arrive & park smart · 7. 5-step door interaction · 8. Path walk & measure · 9. Protection down · 10. Execute scope + test with customer · 11. Cleanup & debris · 12. POD before wheels roll

THE EXCEPTION FORMULA

PHOTOS » NOTES » DISPATCH CALL » CUSTOMER OPTIONS » DOCUMENT THE DECISION

DISPATCH: [DISPATCH PHONE]. Call from the stop, not from the road.

THE FIVE NEVER-DOS

1. **Never force a corroded valve.** It breaks, the house floods, and it's ours.
2. **Never skip the anti-tip bracket** on a range, or skip *offering* the anchor strap on a dresser.
3. **Never enter without the path walk and protection down:** runners, jams, shoe covers.

4. **Never promise the customer anything dispatch hasn't authorized.**
5. **Never falsify a POD.** Photos and signatures are sacred.

When in doubt: photos, notes, call dispatch. You will never be punished for a careful exception. You will always be accountable for a hidden problem.