

White Glove Delivery SOP and Service Guide

White Glove is useful only when the merchant, provider, customer, and crew share the same written promise. This SOP separates curbside, threshold, room-of-choice, White Glove, assembly, installation, and removal services; establishes the readiness and appointment gates; and preserves completion evidence with the order through final-bill review.

UPDATED August 13, 2026 | 12 minute read

BEST FOR: Ecommerce, customer care, warehouse, shipping, carrier-management, and final-mile delivery teams

WEB GUIDE: <https://shipsafeoffers.com/guides/white-glove-delivery-sop>

Current availability

This public SOP is a service-design and operating template. It does not establish a universal meaning of White Glove, promise provider coverage, set a carrier rate, replace a provider agreement or tariff, authorize licensed trade work, or guarantee that an item will fit. The merchant and delivery provider must approve the service scope, availability, safety requirements, customer instructions, and evidence standard that control each program.

IN THIS GUIDE

01. Start with a written service standard
02. Define the delivery offers separately
03. Build one complete delivery order
04. Complete the delivery-readiness screen
05. Treat the appointment as a readiness gate
06. Release only a delivery-ready shipment
07. Follow the in-home delivery sequence
08. Use an exception code and next owner
09. Capture completion and claim-ready evidence
10. Reconcile the delivery and improve the next offer

Start with a written service standard

Final mile is the last leg from a store, terminal, hub, or distribution point to the destination. For heavy goods, that last leg may stop at the curb, cross the threshold, continue to a room of choice, or include unpacking, assembly, installation, packaging removal, old-item removal, and other approved work.

White Glove is not enough by itself as an operating instruction. The order should name where the item goes, what the crew will do, what the customer must prepare, which access conditions are included, what proof is required, and which work is excluded or requires manual approval.

Scope before price

Do not compare a curbside or dock-to-dock rate with a customer promise that requires an appointment, two-person inside carry, stairs, unpacking, assembly, debris removal, or redelivery. Rate the written scope that the customer is being offered.

Define the delivery offers separately

Recommended service-tier definitions for merchant review		
Tier	Default scope	Do not assume
Curbside	Scheduled exterior drop at an accessible location with proof of delivery	Inside carry, unpacking, assembly, or debris removal
Threshold	Scheduled placement in the first safe, dry area	Room placement, stairs, unpacking, or assembly
Room of Choice	Two-person carry to one approved room after access review	Assembly, installation, mounting, or old-item removal
White Glove	Room placement, unpacking, packaging removal, and specifically approved light assembly	Licensed work, structural mounting, complex assembly, or undisclosed access
Specialized	A manually approved plan for complex assembly, installation, removal, exceptional weight, or difficult access	Any task outside the written provider scope

Use the public service-scope builder before configuring an offer:

- Build a White Glove delivery scope

<https://shipsafeoffers.com/white-glove-delivery#service-selector>

- Read the final-mile industry explanation

<https://shipsafeoffers.com/blog/white-glove-final-mile-delivery-guide>

Build one complete delivery order

The delivery record should connect the sellable product, planned packed shipment, approved customer service, destination conditions, provider quote, appointment, warehouse release, crew instructions, completion evidence, exceptions, and final invoice. Do not force each team to recreate the promise from an email subject line or carrier portal note.

1 Product and shipment

SKU, quantity, value, packed dimensions, weight, handling units, orientation, fragility, stackability, protection, and required equipment.

1 Customer service

Exact placement, unpacking, assembly, installation, removal, disposal, signature, condition, and completion requirements.

1 Destination and access

Property type, truck access, parking, gates, dock, liftgate, doors, turns, stairs, elevator, long carry, floor protection, and final room.

1 Commercial basis

Provider, service code, quote or contract basis, date, included work, accessorial assumptions, exclusions, and authorization.

1 Owners and timestamps

Named merchant, provider, customer-care, warehouse, scheduling, exception, and closeout owners with the current state and next deadline.

Complete the delivery-readiness screen

1 Confirm the property

Identify residential, commercial, limited-access, gated, high-rise, campus, jobsite, or other conditions that affect truck and crew access.

2 Measure the path

Record the narrowest doorway, hallway, turn, stair, landing, elevator opening and interior, ceiling restriction, and final placement area that matter for the item.

3 Photograph the critical points

Capture the safe approach, parking, exterior entry, tight turns, vertical access, room path, and cleared placement area with customer consent.

4 Match crew and equipment

Confirm people, straight truck or other vehicle, liftgate, dollies, straps, ramps, protection, tools, fasteners, disposal capacity, and any qualified technician.

5 Resolve exceptions before scheduling

Route insufficient clearance, exceptional weight, multiple stair flights, unsafe conditions, installation, wall mounting, product modification, or uncertain scope to manual review.

A fit screen is not a guarantee

Static measurements and photos cannot capture every turn, obstruction, product orientation, flex, packaging layer, lift method, or changing site condition. The final safety decision remains with the trained provider and crew.

Try the customer-side readiness foundation:

- Open the Delivery Readiness Planner

<https://shipsafeoffers.com/delivery-readiness>

- Open the interactive Cartonization Studio

<https://shipsafeoffers.com/tools/cartonization-studio>

Treat the appointment as a readiness gate

An appointment should not be offered merely because a calendar has an open slot. Inventory, hub status, route capacity, crew skill, equipment, service scope, site readiness, customer availability, and exception review should agree before a window is confirmed.

Appointment-state controls		
State	Required condition	Customer communication
Not ready	Product, route, crew, access, or service scope is unresolved	Explain the missing gate without promising a date
Ready to offer	Eligible provider windows are available for the approved scope	Offer only supported choices and the reschedule rule
Confirmed	Customer selects a window and acknowledges readiness instructions	Send scope, date or window, preparation list, contact path, and change cutoff
Out for delivery	Product, documents, crew, equipment, route, and customer contact are verified	Send the approved arrival update and exception contact path
Reschedule	A customer, provider, inventory, weather, safety, or access exception blocks completion	Record the reason, ownership, fees if applicable, and next eligible action

Preserve consent and change history

Keep the selected window, notification method, readiness acknowledgement, reschedule or cancellation terms, changes, and final confirmation attached to the order.

Release only a delivery-ready shipment

1 **Verify identity**

Match the physical product and every handling unit to the correct order and service scope.

2 **Inspect and protect**

Record pre-dispatch condition, approved packaging, corners and surfaces, hardware, parts, instructions, tools, and no-stack or orientation marks.

3 **Measure and weigh**

Capture final extreme dimensions, scale weight, handling-unit count, and material variance from the plan.

4 **Prepare documents**

Include the order, provider and service code, appointment, route notes, BOL or delivery document, packing and assembly instructions, exception contacts, and proof checklist.

5 **Confirm load plan**

Use safe securement, separation, sequence, equipment, and unload access appropriate to the product and vehicle.

6 **Record handoff**

Timestamp the release, vehicle, crew or provider, condition, photos, documents, and unresolved exceptions.

Connect the physical handoff to the order record:

- **See the Margin Safe Packer workflow**

<https://shipsafeoffers.com/packer>

- **Read why reviewed packouts beat rigid box rules**

<https://shipsafeoffers.com/blog/reviewed-packouts-not-rigid-box-rules>

Follow the in-home delivery sequence

1 **Arrive and verify**

Confirm the order, customer or authorized recipient, service tier, property, safe parking, access, pets and children, hazards, and final room before unloading.

2 **Inspect the path**

Walk the route, compare it with the readiness record, identify changes, protect floors and surfaces, and stop if the path is unsafe or materially outside scope.

3 **Document pre-service condition**

Record relevant product, packaging, entry-path, and placement-area condition before the move begins, consistent with the approved privacy and photo policy.

4 **Move and place**

Use the approved crew, equipment, lift method, orientation, protection, and communication for each turn and placement.

5 **Complete approved services**

Unpack, assemble, install, remove packaging, or perform other tasks only when they are included, safe, supported, and within provider qualifications.

6 **Inspect and close**

Confirm product condition, stability, operation where approved, final placement, completed scope, debris, property condition, customer acknowledgement, and exceptions.

Stop-work authority

The crew should be authorized to pause or refuse unsafe, unlawful, unqualified, structurally risky, or out-of-scope work without improvising a customer promise at the door.

Use an exception code and next owner

Common final-mile exceptions and immediate actions		
Exception	Immediate action	Record
Customer unavailable	Follow the approved contact and wait-time rule	Attempts, time, location, provider rule, and reschedule owner
No safe access	Stop before damage or injury and escalate	Changed condition, photo where allowed, blocking dimension or hazard, and options
Item will not fit	Do not force, modify, or disassemble outside scope	Measurements, orientations attempted, packaging state, and disposition
Visible damage	Pause the affected service and follow inspection or refusal rules	Condition, packaging, identifiers, photos, customer decision, and custody
Missing or wrong parts	Complete only supported work and identify the follow-up	Part, quantity, product, assembly state, safe disposition, and owner
Out-of-scope request	Explain the approved scope and request authorization	Customer request, safety or qualification issue, decision, and change approval
Property damage allegation	Stop, protect the area, notify the proper owner, and preserve facts	Before-and-after evidence, location, time, witnesses, customer statement, and response owner

Never hide a failed attempt

A failed delivery, refusal, partial service, damage observation, missing part, or reschedule should remain a dated event in the connected order record. Correct the next action without erasing the first event.

Capture completion and claim-ready evidence

1 Identity

Order, product, serial or item identifiers where used, handling units, provider, vehicle, crew, customer or authorized recipient, and timestamps.

1 Scope

The service offered, approved add-ons, property and access conditions, instructions, exclusions, and any authorized change.

1 Condition

Relevant pre-service and post-service product, packaging, path, room, and property condition captured under the approved photo and privacy rules.

1 Completion

Placement, unpacking, assembly, installation test where allowed, debris or old-item removal, signature, acknowledgement, and open work.

1 Exception

The observed fact, location, time, evidence, customer statement, stop or continue decision, custody, and next owner.

1 Financial closeout

Provider invoice, accessorials, redelivery or additional-service authorization, quoted-versus-billed variance, claim, recovery, and final disposition.

Collect the minimum useful evidence

Photos and measurements should be purposeful, consented, access-controlled, and attached to the order—not collected broadly or sent through an ordinary public form.

Reconcile the delivery and improve the next offer

Closeout should compare the promised service, planned handling units, provider quote, appointment, actual work, exceptions, customer outcome, and final bill without overwriting the original assumptions. Repeated variance should change the operating rule only after review.

White Glove operating measures to review	
Measure	Question
Readiness completion	How many orders reached scheduling with the required access, measurement, photo, and service facts?
First-attempt completion	Which approved deliveries completed the full scope on the first scheduled attempt?
Service-time variance	Where did actual on-site time differ materially from the planned tier and why?
Exception rate	Which access, fit, damage, parts, customer, crew, equipment, or scope exceptions recur?
Quote-to-bill variance	Which additional services, redelivery, wait time, accessorials, or provider charges were not in the approved cost basis?
Damage and claim outcome	What was observed, what evidence existed, what was paid or recovered, and which prevention rule should be reviewed?

Measure	Question
Customer communication	Were the scope, preparation, appointment, arrival, exception, and resolution messages timely and consistent?

Continue through financial and operational closeout:

- Read quote-to-bill reconciliation

<https://shipsafeoffers.com/blog/quote-to-bill-reconciliation>

- Follow an order to the final carrier bill

<https://shipsafeoffers.com/blog/furniture-order-to-final-bill-workflow>

- Start the merchant onboarding checklist

<https://shipsafeoffers.com/onboarding>

RELATED RESOURCES

Build a White Glove delivery offer

Compare service tiers and use the interactive scope selector.

<https://shipsafeoffers.com/white-glove-delivery>

Preview the customer readiness funnel

Screen access, measurements, photos, appointment preferences, and review flags locally.

<https://shipsafeoffers.com/delivery-readiness>

Read the White Glove and final-mile industry guide

Understand the industry structure, cost drivers, handoffs, and common failure points.

<https://shipsafeoffers.com/blog/white-glove-final-mile-delivery-guide>

Open the interactive Cartonization Studio

Turn cart lines into an illustrative carton, pallet, and mixed-mode handling-unit plan.

<https://shipsafeoffers.com/tools/cartonization-studio>

Watch the workflow walkthroughs

Play accessible motion explainers for service scope, cartonization, and customer readiness.

<https://shipsafeoffers.com/videos>

SUPPORT: help@shipsafeoffers.com

Do not send passwords, API keys, carrier credentials, negotiated rates, customer labels, or sensitive exports through ordinary email.