Trade job quoting checklist

CHECKLIST TEMPLATE

Business _____ Location _____ Date _____

Quote For each quote

TASK	NOTES	INITIALS
Site visit		
☐ Measure and photograph the work area		
☐ Ask what the customer wants and by when		
☐ Note access, parking and any hazards		
Pricing		
☐ Write the scope of work in plain language		
☐ Price materials, with a margin		
☐ Estimate labour hours and any subcontractors		
☐ Include permits, inspections and waste removal		
Terms		
☐ List what is excluded		
☐ Explain how variations are priced		
☐ Set the deposit, payment terms and how long the quote is valid		
☐ Send the quote and follow up within a week		

Completed by _____ Checked by (manager) _____ Date _____ Notes _____