

QUOTING CHECKLIST

Identifier: _____

Client Name: _____

Quote completed by: _____

Important Dates

Notes

Before you visit

- Confirm the job address
- Know what the client wants quoted
- Check if there are photos, plans, or notes already sent
- Bring what you need to measure properly
- Make sure your pricing is roughly up to date

On site

- Measure everything needed for the quote
- Take clear photos of the job
- Note anything that could change the price
- Check access, parking, height, waste removal, and awkward areas
- Ask the client about timing, budget, and any must-haves
- Write notes clearly while you are there

Before pricing

- Check your measurements make sense
- Review all photos and notes
- List the materials needed
- Include labour, materials, waste, travel, and extras
- Add margin/profit - don't just cover costs
- Allow for anything uncertain or risky

Before sending the quote

- Make the scope clear
- Say what is included
- Say what is not included
- Check the total price
- Add payment terms
- Add how long the quote is valid for
- Include a clear way to accept the quote

After sending

- Save the quote and job details
- Set a follow-up reminder
- Follow up within 24-48 hours
- If accepted, move straight to booking/materials
- If declined, note why and improve the next quote