

A practical pre-send checklist

Use this checklist as a structured pause before a construction estimate or proposal is sent. It is designed to help surface missing inputs, pricing assumptions, subcontractor exceptions, and presentation gaps. It does not calculate an estimate or replace professional judgment.

HOW TO USE IT	Review each line against current source records. Mark N/A only when the item genuinely does not apply. Resolve material exceptions before approving the send decision.
KEEP WITH THE FILE	Record who reviewed the estimate, the review date, and any unresolved conditions. Retain the completed checklist with the project estimate or bid record.

01

Project, scope, and source records

- ☐ Project name, client, location, estimate ID, revision, and date are current.
- ☐ The bid set, addenda, specifications, owner directions, and other governing inputs are identified.
- ☐ Included scope, excluded scope, alternates, allowances, and unit-price items are distinguishable.
- ☐ Quantities and takeoff assumptions can be traced to a source or documented judgment.
- ☐ Long-lead, access, phasing, schedule, and temporary-work assumptions have been considered.

02

Direct cost completeness

- ☐ Labor quantities, production assumptions, wage rates, burden, and crew mix reflect the intended plan.
- ☐ Material quantities, waste, freight, delivery, taxes, and handling are included where applicable.
- ☐ Equipment, rentals, mobilization, fuel, permits, disposal, and other direct costs are addressed.
- ☐ Cost references are current enough for the expected bid and performance dates.
- ☐ Zero, blank, placeholder, and unusually low or high cost entries have been reviewed.

Review the economics, not just the total

The same percentage can describe very different pricing outcomes. Confirm each layer of cost recovery and profit before relying on the final number.

03

Overhead, contingency, escalation, and profit

- ☐ The overhead method and recovery amount are explicit and consistent with company practice.
- ☐ Contingency addresses identified uncertainty without masking incomplete scope.
- ☐ Escalation is considered when pricing may move before procurement or performance.
- ☐ Markup and gross margin are labeled correctly and are not treated as interchangeable.
- ☐ The final selling price meets the intended gross-profit and gross-margin decision after all cost layers.

04

Subcontractor and supplier comparison

- ☐ Each quote is tied to the correct package, revision, validity period, and contact.
- ☐ Missing scope, duplicate scope, exclusions, allowances, and alternates are identified.
- ☐ Quoted amounts and normalized comparison amounts are kept separate.
- ☐ Schedule fit, capacity, qualifications, insurance, and commercial exceptions are considered as applicable.
- ☐ The selected quote is supported by the normalized comparison, not only by the lowest base number.

05

Sensitivity and risk review

- ☐ Material cost, labor productivity, selected bids, and other major drivers have been sensitivity-tested where useful.
- ☐ Allowance exposure and unresolved scope conditions are visible to the reviewer.
- ☐ Critical errors, stale references, selection exceptions, and margin-threshold warnings are resolved or documented.
- ☐ The estimate remains supportable if a major assumption changes within the reviewed range.

Make readiness explicit

A polished proposal is not proof of a complete estimate. Reconcile the client-facing terms to the internal pricing decision before release.

06

Client proposal reconciliation

- ☐ Client and project details match the estimate record.
- ☐ The proposal price reconciles to the approved selling price and accepted alternates.
- ☐ Scope, allowances, alternates, assumptions, exclusions, schedule, and payment terms are presented clearly.
- ☐ Internal costs, markup, margin, risk flags, and confidential review notes are not exposed.
- ☐ Formatting, page breaks, headers, totals, and signatures have been reviewed in the final output format.

07

Approval and record

- ☐ The estimator has completed a self-review.
- ☐ A second reviewer has challenged material scope, pricing, and risk assumptions when required by company practice.
- ☐ Remaining conditions and the person responsible for each next action are documented.
- ☐ The approved estimate, proposal, supporting quotes, and review record are saved together.
- ☐ The bid is intentionally marked ready to send; readiness is not inferred from completion alone.

Estimate / bid ID		Revision	
Prepared by		Date	
Reviewed by		Date	
Send decision	READY / HOLD	Open conditions	

Use your own current source records and professional judgment. This checklist is an organizational aid, not legal, tax, engineering, code, regulatory, estimating, or project-performance advice.