Checklist

The estimate checklist

Customers compare estimates side by side. Go through this list before you hit send, and yours will be the clear, easy one to say yes to.

1 Before you price

- [ ] Measurements, photos and notes from the visit are saved with the customer.
- [ ] You know who decides and when they want the work done.
- [ ] Permits, HOA rules or access issues are noted.

2 The estimate itself

- [ ] A title the customer understands (“Back deck rebuild”), not a code.
- [ ] Scope in plain words: what's included, and what is not.
- [ ] Line items with clear prices, or one total with a clear scope.
- [ ] Good / Better / Best options when it makes sense, so they choose how, not whether.
- [ ] Photos of their site and of similar work you've done.
- [ ] Materials, colors and brands named, so nothing is a surprise.

3 Terms that protect both sides

- [ ] Deposit amount and when the balance is due.
- [ ] How long the price is valid.
- [ ] How changes are handled: a written change order, signed before extra work.
- [ ] Warranty, start window and expected duration.

4 Make yes easy

- [ ] They can approve and sign online, from their phone.
- [ ] They can pay the deposit right when they sign.
- [ ] Your phone number and name are on it, so questions come to you.

5 After you send

- [ ] Send it within 24 hours of the visit, while they still remember you.
- [ ] Know when it was opened, and call the same day.
- [ ] Follow up kindly a few times over two weeks, then ask if you should close the file.

360 estimates check most of this list for you: photos, Good/Better/Best, e-signature with the deposit, opened alerts, and Max's follow-up.

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