

Qualify, frame, quote: the contractor checklist

One sheet per prospect — so you only drive out when it's worth it, and quote against a clear scope.

Client: _____ Project: _____ Call date: _____

1 On the phone — qualify before driving out (10 min)

Question	Answer / notes
Project — which rooms, what work? Floor plan or photos available?	
Timeline — desired start date? “Someday” ≠ “in 6 weeks”	
Budget — a range in mind, even a wide one?	
Decision — who decides? Other quotes in progress?	

- ☐ **“Too early” prospect** (no measurements, photos or budget): send a preparation list and schedule a call-back — don't drive out yet

2 During the visit — lock down the scope

- ☐ **Restate the project** out loud and note the client's corrections
- ☐ **Measurements verified** on site (or shared plan confirmed)
- ☐ **Debris**: who removes it? Included or not?
- ☐ **Common areas**: protection, working hours, building approval?
- ☐ **Risk points**: load-bearing walls, moisture, substrate condition, utilities
- ☐ **Assumptions stated** to the client (surfaces, substrates, access)
- ☐ **Surprises framed**: “any discovery = written change order before the work”
- ☐ **Verbal ballpark** given if possible — filters out under-budgeted projects

3 Before sending the quote — final check

- ☐ **One line per item**, with quantities
- ☐ **Pricing assumptions** in writing (surfaces, substrates, access)
- ☐ **Exclusions** listed in writing
- ☐ **Handling of surprises**: written change order signed before the work
- ☐ **Estimated duration** and end date stated
- ☐ **Payment schedule** tied to job progress
- ☐ **Insurance certificates** attached (liability, workmanship/structural warranty)
- ☐ **Quote validity** and price revision terms stated

Against the lowball: don't cut your price — offer a line-by-line comparison. The gap almost always comes from scope (debris, protection, making good), not from your hourly rate.