

# The Builder Pre-Quote Checklist

Most bad quotes aren't caused by bad arithmetic. They're caused by sending a number before you've finished checking the job. The spreadsheet might be right, but the assumptions it's built on are wrong.

Before a quote leaves your office, run through this checklist. It covers eight areas where residential builders most commonly expose themselves — usually without realising it.

## 1. Scope and document status

Start by identifying the latest drawing version, specifications, inclusions, exclusions, selections, engineering notes, and client requests. Don't let outdated PDFs, text messages, or verbal meetings quietly become your contract assumptions. If you can't name the document you priced from, the quote isn't ready.

## 2. Work package coverage

Divide the scope into work packages so every part of the job is accounted for and nothing is priced twice. This is especially important in custom homes and renovations, where overlaps between framing, cabinetry, waterproofing, electrical rough-in, and owner-supplied items create blind spots. The question is simple: has every part of the job been assigned to someone — and has no item been double-counted?

## 3. Site conditions

Site visits reveal what the drawings don't show: access constraints, material delivery limits, slope, demolition surprises, neighbour exposure, parking restrictions, utility locations, and temporary protection needs. In renovations, whether the owners are living in the home materially changes supervision, sequencing, dust control, and temporary facilities. If you haven't checked site before quoting, the quote is incomplete regardless of how accurate the takeoff is.

## 4. Approvals and council requirements

Before the quote goes out, check whether HOA, council, heritage, bushfire, flood, energy code, septic, grading, or utility constraints are likely to change the design or schedule. Approval delays are one of the most common drivers of cost and time variations on residential jobs — and they're usually knowable before you price.

## 5. Trade and supplier engagement

Ask three questions: which trade prices have been actively confirmed? Which long-lead items need a selection or placeholder? Which budget items are still exposed to market pricing? Trade silence is not trade support. If a critical sub hasn't confirmed a number, that's an open risk sitting inside your quote.

## 6. Commercial completeness

Make sure your quote includes direct costs, indirect field costs, overhead, profit, and contingency — plus a validity date, payment assumptions, alternates where relevant, and a basic change-management path. The quote doesn't need to be the contract, but it shouldn't create commercial ambiguity the contract later has to fix.

## 7. Legal and state-specific requirements

In Australia, residential building contracts are regulated at the state and territory level. Requirements vary for mandatory contract terms, cooling-off periods, deposit limits, change-order formalities, and disclosure obligations. If the job is in a jurisdiction with strong consumer protection rules, check those assumptions before the price leaves the office. Getting this wrong is more common than most builders realise.

## 8. Quote classification

Some jobs are ready for a fixed proposal. Others are only ready for a budget range or a preconstruction agreement. The cleanest residential teams know what class of certainty they're offering — and what the client still needs to decide before a contract can be executed. That one habit prevents a significant amount of downstream friction.

### Pre-send gate: quick checklist

- Latest drawing and specification version confirmed
- Inclusions and exclusions list attached
- All major work packages assigned — no obvious gaps or overlaps
- Site visit completed, or site assumptions explicitly written
- Council, approval, and compliance constraints reviewed
- Trade and supplier inputs current, dated, and identified
- Allowances and owner selections clearly labelled
- Overhead, profit, and contingency included
- Quote validity date stated
- Change-order process and next-step path stated
- State-specific contract requirements checked

*to your state's building authority for current requirements).*