Business Profile Pro

FREE CHECKLIST

Pricing and Quote Checklist

Send clear, professional quotes that show what is included and make it easy to say yes.

1 Before you quote

- [ ] Understand the **job**: ask questions, take photos and measure.
- [ ] Confirm the **scope**: what is in and what is out.
- [ ] Know your **costs**: labor, materials, overhead and profit.
- [ ] Check your calendar so you can promise a realistic **timeline**.

2 Build the quote

- [ ] Add your **logo**, contact details and license number.
- [ ] Add the customer's name, address, **quote number** and **date**.
- [ ] Add an expiry date for the price.
- [ ] Describe the work in plain words.
- [ ] List **line items** or packages with clear prices.
- [ ] State what is **included and excluded**.
- [ ] Add your **timeline**, **payment terms** and deposit.
- [ ] Add warranty details and how changes will be handled.

3 Make it easy to say yes

- [ ] Offer two or three **options** where it makes sense.
- [ ] Give a clear **next step**: sign, reply or call.
- [ ] Include a thank-you and a way to ask questions.

> **TIP** Clear beats cheap. People say yes more easily when they understand exactly what they get.

4 Send and follow up

- [ ] Send the quote quickly, ideally the **same day**.
- [ ] Send it as a **PDF** and as a link or attachment.
- [ ] Follow up in **2 to 3 days**.
- [ ] Record the result and update your pricing as you learn.

QUOTE SUMMARY OUTLINE

Job: [description] Quote #: [number] Date: [date] Valid until: [date]
Included: [list] Not included: [list]
Total: [price] Deposit: [amount] Timeline: [dates]

Business Profile Pro

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