GENTLETOOLS / FREE RESOURCE SERIES

SMALL BUSINESS / 8 PAGE EDITION

Small Business Quote & Cost Worksheet PDF

Price the whole job, including the work people do not see.

NOT JUST AN EMPTY FORM

Many small jobs look profitable until setup, messages, delivery and overhead are counted. This worksheet collects the assumptions before the number goes to a client, making it easier to explain and revise a quote.

THE FOUR-STEP WORKFLOW

1. **Define what is known**
2. **Track actual events and evidence**
3. **Compare before deciding**
4. **Assign the next concrete action**

- [ ] Separate estimates and verified facts
- [ ] Keep sensitive data secure

No login or email gate. Information you enter stays in the PDF.

QUOTE MARGIN SCRATCHPAD

Build the baseline

Write facts and sources before filling the main table. Do not guess at missing information.

Project or subject

Date or period

STEP 1 Define the deliverables, exclusions and expected deadline.

STEP 2 Add materials, subcontracting, labor and an explicit overhead allowance.

STEP 3 Compare identified costs with the proposed price, then verify taxes and other obligations separately.

STEP 4 Which fact or document still needs checking?

QUOTE MARGIN SCRATCHPAD

Keep a dated record

Record what actually occurred. Reprint this page whenever you need more rows.

Reference period

Review date

SERVICE / ITEM	ESTIMATED FULL COST	PROPOSED PRICE	LABOR AND OVERHEAD ASSUMPTIONS	SOURCE / REFERENCE

Outstanding question or record to confirm

QUOTE MARGIN SCRATCHPAD

Keep a dated record

Record what actually occurred. Reprint this page whenever you need more rows.

Reference period

Review date

SERVICE / ITEM	ESTIMATED FULL COST	PROPOSED PRICE	LABOR AND OVERHEAD ASSUMPTIONS	SOURCE / REFERENCE

Outstanding question or record to confirm

QUOTE MARGIN SCRATCHPAD

Compare with evidence

WHAT THIS DOCUMENT HELPS WITH

Many small jobs look profitable until setup, messages, delivery and overhead are counted. This worksheet collects the assumptions before the number goes to a client, making it easier to explain and revise a quote.

1. Current facts

CURRENT	OPTION	EVIDENCE

2. Alternative course

CURRENT	OPTION	EVIDENCE

3. Uncertain information

CURRENT	OPTION	EVIDENCE

Working conclusion or question

Review by

QUOTE MARGIN SCRATCHPAD

Make the next step happen

Each useful action has an owner, a date and a result that can be checked.

ACTION 1 Define the deliverables, exclusions and expected deadline.

Concrete next action

Owner / due

ACTION 2 Add materials, subcontracting, labor and an explicit overhead allowance.

Concrete next action

Owner / due

ACTION 3 Compare identified costs with the proposed price, then verify taxes and other obligations separately.

Concrete next action

Owner / due

IMPORTANT CONTEXT

This is a planning sheet, not a signed client agreement, legal invoice or tax calculation.

- [ ] Source checked
- [ ] Next action assigned

QUOTE MARGIN SCRATCHPAD

Review a worked example

FICTIONAL EXAMPLE

Illustration: a 500 sale with 135 in materials, 120 in labor and 45 in allocated overhead leaves 200 before other costs and taxes. That is not automatically net profit.

BEFORE YOU RELY ON YOUR RECORDS

- [ ] Facts distinguished from estimates
- [ ] Dates, units and totals checked
- [ ] Source evidence saved separately
- [ ] Private identifiers protected

What will be improved next time?

This is a planning sheet, not a signed client agreement, legal invoice or tax calculation.

QUOTE MARGIN SCRATCHPAD

True job costs

This page is tailored to the topic. Use it to check key items before closing your file.

AREA	ESTIMATE	SOURCE
Materials		
Paid labor		
Unpaid time		
Overhead		
Contingency		

One additional item to check