BUSINESS / WORKSHEET

Small Business Quote + Costs

Make client pricing clearer by accounting for scope, work and costs.

PROJECT CODE

QUOTE DATE

1 PROJECT SCOPE

Define deliverables, quantities, deadline and exclusions.

2 DIRECT COSTS + HOURS

Include purchases, contractor fees and paid labor estimates.

3 OVERHEAD + RISK

Allow for travel, admin time, processing fees and contingency.

KEEP YOUR SOURCES

Add dates and factual notes. Keep original documents in a secure separate place.

BUSINESS / RECORD + REVIEW

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PERIOD / PROJECT	REVIEW DATE

COST ITEM	QTY / HRS	UNIT COST	EST. TOTAL	SOURCE / ASSUMPTION

PROPOSED SALE PRICE	ESTIMATED INCLUDED COSTS

RECONCILE BEFORE DECIDING

Amounts and statuses do not calculate automatically. Review estimates against confirmed facts.

BUSINESS / EXAMPLE + USE GUIDE

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01

INCLUDE ALL HOURS

Admin, delivery, setup and follow-up are work too.

02

CHECK THE DIFFERENCE

Price minus listed costs is not necessarily net profit.

03

SET TERMS

Specify revisions, deposits, due dates and quote validity.

SAMPLE / SERVICE PRICE

Revenue: 500. Materials: 135. Labor: 120. Allocated overhead: 45.

Difference: 200 before omitted expenses, other charges and taxes.

SCOPE + SAFETY

Planning sheet only, not an invoice, signed agreement or tax calculation.