# Planning, Estimating and Contract Review (Not for circulation)

## Customer Information

Customer:

Address:

Delivery Address (if different):

## Scope of Work

Description:

## Special Requirements

Any special requirements, issues with infrastructure, environment, competent people, equipment, outsourcing, internal/external issues, relevant interest parties, and other considerations. Any risk or opportunity:

## Task or Work Activity (including design, laboratory, production)

|  |  |  |
| --- | --- | --- |
| Task or Work Activity | Hourly Rate | Labour Cost |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
| Total Cost of People  Use additional plain sheets if required | |  |

## Materials Required Description

|  |  |  |  |
| --- | --- | --- | --- |
| Description | Cost/Unit | Number Required | Cost |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| Total Material Cost  Use additional plain sheets if required | | |  |

## Additional Subcontract, Equipment, or Transport Cost

|  |  |
| --- | --- |
| Description | Cost |
| Total estimated cost |  |
| Add % for risk (Typically 5-15%): |  |
| Add margin (Typically 25%): |  |
| Tender price: |  |
| Estimated/approved by: Date: | |

## Review (AFTER receipt of acceptance, client purchase order, or instruction to proceed):

|  |  |  |
| --- | --- | --- |
| Purchase order or confirmation same as quote: | |  |
| Any additional risks: |  | |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Yes  Accept |  | Make counteroffer |  | Politely Decline |  |