

Estimating Process

1. Approach
 - A. Provide a cost effective, comprehensive bid to our customers.
 - B. Provide a bid that clearly defines scopes.
 - C. Provide a code compliant bid.
 - D. Know the customer and their capabilities when bidding a project.
2. Quoting
 - A. Thoroughly review quote. Immediately send out special items to obtain pricing. (make sure to obtain lead times and cut sheets)
 - B. Submit any questions that you have to the dealer (put them in writing after a thorough review of bid package). Let them know when they need to respond in order to meet their requested quote date.
 - C. Review (as necessary) the project with Greg Berry or your engineering manager in regards to code compliance and any structural issues you may have.
 - D. Make sure to include all necessary clarifications/exceptions on the cover page.
 - E. Make sure to utilize the proper factor/divisor.
 - F. When quote is completed, review thoroughly. If mandated, review with your Sales Manager or VP of Sales. Jay D. to review any quote over \$1 mil.
3. Options for quote
 - A. Options can make a big difference on a quote. If the customer is not clear or vague on a spec try to option up and not credit down. The first number they see is the first they remember. If a spec dictates some extremely high price item, and it could be changed to a more cost effective item, then by all means option a credit.
 - B. Be cautious, when providing an option, of the consequences that come with and make any necessary clarifications (i.e.. when optioning TT&P- clarify against responsibility for cracks during transport/set).
 - C. Suggesting an option can be a good sales technique. It shows you are paying attention and looking out for the dealer.
4. Sales Release/Building Order Sheet
 - A. It is important that both get filled out completely and properly.
 - B. Each and every monetary change needs to be entered on the BOS!! Red Lines, Change Orders, etc. should all be entered on the BOS to keep all tracking proper. It is also very important to include the factor when adjusting the BOS with changes as it will adjust the overall building divisor.
 - C. BOS-Yes, it's that important to mention twice!!