EXCEL E-WASTE ASSESSMENT PRICING CALCULATOR

Complete Formula Setup

SHEET SETUP INSTRUCTIONS

Create the following sheets in your Excel workbook:

1. **Calculator** (Main sheet with all calculations)
2. **Rates** (Reference sheet for hourly rates and multipliers)

SHEET 1: RATES (Reference Data)

Cell Layout for Rates Sheet:

Cell	Label	Value
A1	Base Consulting Rate	150
A2	Travel Time Rate	100
A3	Rush Emergency Rate	225
A4	Mileage Rate	0.67
A5	Simple Multiplier	0.85
A6	Standard Multiplier	1.00
A7	Complex Multiplier	1.25
A8	Highly Complex Multiplier	1.50
A9	Profit Margin %	0.25

SHEET 2: CALCULATOR (Main Calculations)

SECTION A: PROJECT INFORMATION (Rows 1-10)

A1: Project Information
A2: Client Name
A3: Facility Location
A4: Assessment Date
A5: Facility Size (sq ft)
A6: Processing Volume (tons/month)
A7: Complexity Level

SECTION B: COMPLEXITY ASSESSMENT (Rows 12-30)

Complexity Factors Checklist:

Cell	Factor	Points	Formula
A12	Single location	C12	=IF(B12=TRUE,0,0)
A13	Multiple locations	C13	=IF(B13=TRUE,2,0)
A14	Basic electronics recycling only	C14	=IF(B14=TRUE,0,0)
A15	ITAD services included	C15	=IF(B15=TRUE,1,0)
A16	Data destruction services	C16	=IF(B16=TRUE,2,0)
A17	Medical device processing	C17	=IF(B17=TRUE,2,0)
A18	Hazardous material handling	C18	=IF(B18=TRUE,2,0)
A19	International shipping	C19	=IF(B19=TRUE,2,0)
A20	Multiple downstream vendors	C20	=IF(B20=TRUE,1,0)
A21	Existing compliance violations	C21	=IF(B21=TRUE,2,0)
A22	No existing management systems	C22	=IF(B22=TRUE,2,0)
A23	Limited documentation	C23	=IF(B23=TRUE,1,0)
A24	Language barriers	C24	=IF(B24=TRUE,1,0)
A25	Unionized workforce	C25	=IF(B25=TRUE,1,0)
A26	24/7 operations	C26	=IF(B26=TRUE,1,0)

Total Complexity Score:

C28: =SUM(C12:C26)

Complexity Classification:

C30: =IF(C28<=3,"Simple",IF(C28<=7,"Standard",IF(C28<=12,"Complex","Highly Complex")))

SECTION C: TIME TRACKING (Rows 32-55)

Phase 1: Pre-Assessment Preparation

Cell	Activity	Est Hours	Actual Hours	Notes
A33	Initial client consultation	1.0	E33	F33
A34	Document review (pre-visit)	2.0	E34	F34
A35	Assessment planning	1.0	E35	F35
A36	Travel planning/logistics	0.5	E36	F36

D37: =SUM(D33:D36) (Phase 1 Estimated Total)
E37: =SUM(E33:E36) (Phase 1 Actual Total)

Phase 2: On-Site Assessment

Cell	Activity	Est Hours	Actual Hours	Notes
A39	Facility walkthrough	4.0	E39	F39
A40	Staff interviews	3.0	E40	F40
A41	Process observation	4.0	E41	F41
A42	Documentation review	3.0	E42	F42
A43	Data collection/photos	2.0	E43	F43
A44	Exit interview with management	1.0	E44	F44

D45: =SUM(D39:D44) (Phase 2 Estimated Total)
E45: =SUM(E39:E44) (Phase 2 Actual Total)

Phase 3: Analysis & Report Development

Cell	Activity	Est Hours	Actual Hours	Notes
A47	Data analysis	4.0	E47	F47
A48	Gap analysis development	6.0	E48	F48
A49	Recommendation formulation	4.0	E49	F49
A50	Cost estimation research	2.0	E50	F50
A51	Report writing	8.0	E51	F51
A52	Report review/editing	2.0	E52	F52

D53: =SUM(D47:D52) (Phase 3 Estimated Total)
E53: =SUM(E47:E52) (Phase 3 Actual Total)

Phase 4: Delivery & Follow-up

Cell	Activity	Est Hours	Actual Hours	Notes
A55	Report preparation/formatting	1.0	E55	F55
A56	Client presentation meeting	2.0	E56	F56
A57	Q&A and clarifications	1.0	E57	F57
A58	Follow-up communications	1.0	E58	F58

D59: =SUM(D55:D58) (Phase 4 Estimated Total)
E59: =SUM(E55:E58) (Phase 4 Actual Total)

Total Project Time:

D61: =D37+D45+D53+D59 (Total Estimated Hours)
E61: =E37+E45+E53+E59 (Total Actual Hours)
F61: =E61-D61 (Variance)

SECTION D: EXPENSE TRACKING (Rows 63-80)

Travel Expenses

Cell	Item	Est Cost	Actual Cost	Notes
A64	Mileage	=D64*Rates!A4	E64	F64
A65	Flights	D65	E65	F65
A66	Hotel accommodation	D66	E66	F66
A67	Meals during travel	D67	E67	F67
A68	Parking/transportation	D68	E68	F68

D69: =SUM(D64:D68) (Travel Estimated Total)
E69: =SUM(E64:E68) (Travel Actual Total)

Direct Project Expenses

Cell	Item	Est Cost	Actual Cost	Notes
A71	Report printing/binding	D71	E71	F71
A72	Research subscriptions	D72	E72	F72
A73	Software/tools used	D73	E73	F73
A74	Communication costs	D74	E74	F74

D75: =SUM(D71:D74) (Direct Expenses Estimated Total)
E75: =SUM(E71:E74) (Direct Expenses Actual Total)

Total Expenses:

D77: =D69+D75 (Total Estimated Expenses)
E77: =E69+E75 (Total Actual Expenses)

SECTION E: PRICING CALCULATION (Rows 82-110)

Time-Based Pricing

Cell	Component	Hours	Rate	Subtotal
A83	Pre-assessment preparation	=E37	=Rates!A1	=B83*C83
A84	On-site assessment	=E45	=Rates!A1	=B84*C84
A85	Travel time	G85	=Rates!A2	=B85*C85
A86	Analysis & report development	=E53	=Rates!A1	=B86*C86
A87	Delivery & follow-up	=E59	=Rates!A1	=B87*C87

D88: =SUM(D83:D87) (Total Labor Cost)

Project Totals:

A90: Total Labor
B90: =D88

A91: Total Expenses
B91: =E77

A92: Subtotal
B92: =B90+B91

A93: Complexity Multiplier
B93: =IF(C30="Simple",Rates!A5,IF(C30="Standard",Rates!A6,IF(C30="Complex",Rates!A7,Rates!A8)))

A94: Adjusted Subtotal
B94: =B92*B93

A95: Profit Margin
B95: =B94*Rates!A9

A96: TOTAL PROJECT VALUE
B96: =B94+B95

SECTION F: PRICING VALIDATION (Rows 112-125)

Market Rate Comparison:

A113: Industry Standard Low
B113: 3500

A114: Industry Standard High
B114: 7500

A115: Our Calculated Price
B115: =B96

A116: Position in Range
B116: =IF(B115<B113,"Low",IF(B115>B114,"High","Mid"))

Profitability Analysis:

A118: Total Revenue
B118: =B96

A119: Direct Costs
B119: =B92

A120: Gross Profit
B120: =B118-B119

A121: Gross Margin %
B121: =B120/B118

A122: Effective Hourly Rate
B122: =B118/E61

SECTION G: PRICING RECOMMENDATIONS (Rows 127-140)

Quote Options:

A128: Option 1 - Basic Package
B128: =ROUND(B96*0.85,-2)

A129: Option 2 - Comprehensive Package
B129: =ROUND(B96,-2)

A130: Option 3 - Premium Package
B130: =ROUND(B96*1.25,-2)

Performance Metrics:

A132: Target Hourly Rate Low
B132: 150

A133: Target Hourly Rate High
B133: 250

A134: Performance vs Target
B134: =IF(B122<B132,"Below",IF(B122>B133,"Above","On Target"))

ADDITIONAL FORMULAS FOR ENHANCED FUNCTIONALITY

Conditional Formatting Rules:

For Complexity Score (C28):

- Green: <=3 (Simple)
- Yellow: 4-7 (Standard)
- Orange: 8-12 (Complex)
- Red: 13+ (Highly Complex)

For Hourly Rate Performance (B122):

- Red: <150
- Yellow: 150-200
- Green: 200-250
- Blue: >250

Data Validation for Checkboxes:

For cells B12:B26 (complexity factors), use Data Validation:

- Allow: List
- Source: TRUE,FALSE

Travel Time Calculator:

Add this formula in cell G85 for automatic travel time calculation:

```
=IF(D64>0,D64/Rates!A4/50,0)
```

(Assumes 50 mph average driving speed)

SETUP INSTRUCTIONS:

1. **Create two sheets**: "Rates" and "Calculator"
2. **Input the rates** in the Rates sheet as shown above
3. **Copy and paste formulas** into the Calculator sheet
4. **Set up data validation** for TRUE/FALSE checkboxes
5. **Apply conditional formatting** for visual indicators
6. **Protect the Rates sheet** to prevent accidental changes

7. **Save as template** for reuse on each project

USAGE WORKFLOW:

1. **Enter project information** (Client name, facility details)
2. **Check applicable complexity factors** (TRUE/FALSE)
3. **Input estimated hours** for planning
4. **Enter actual hours** as project progresses
5. **Input expenses** as incurred
6. **Enter travel time** in G85 if different from calculated
7. **Review pricing recommendations** and select appropriate option

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This Excel calculator will automatically:

- Calculate complexity scores and classifications
- Sum all time tracking phases
- Apply appropriate hourly rates based on activity type
- Calculate complexity multipliers
- Generate multiple pricing options
- Show profitability metrics
- Provide performance indicators

Save this as a template and use it for every assessment project to maintain consistent pricing and track your business metrics.