

Quote Accuracy & Risk Check

Protect margin. Prevent callbacks. Stop preventable mistakes.

DOCUMENT PURPOSE: This checklist exists to catch preventable errors before a quote goes out — when fixes are easy and inexpensive. It is not about slowing sales down. It is about protecting profit, confidence, and customer trust.

SECTION 1 — WHO THIS IS FOR

This checklist is completed by the salesperson before sending a formal quote.

- Management does not redo this checklist.
- Management enforces that it exists.
- If it is not completed and attached to the job file, the quote is considered incomplete.

SECTION 2 — WHEN THIS IS USED

This checklist is completed:

- After the measure (if applicable)
- Before a formal quote is sent
- Before any pricing is finalized with the customer

Requirement Level:

- This is not required for early rough pricing.
- This is required before final numbers leave the building.

SECTION 3 — QUOTE ACCURACY CHECKLIST

(Salesperson completes every item)

A. Scope & Product Clarity

- Correct rooms and areas confirmed
- Correct product selected (SKU, color, size, dye lot)
- Transitions, trims, stair materials defined
- Demo / removal / prep scope clearly stated

B. Measurement & Layout

- Square footage verified against measure
- Waste factor appropriate for layout/product
- Seams, direction, pattern considerations addressed
- Stairs counted and priced correctly

D. Risk & Expectation Check

- Known product limitations explained to customer
- Moisture / subfloor disclaimers addressed
- Claims risk products handled per standards
- Customer understands guarantee limitations

C. Installation & Labor

- Labor method matches product requirements
- Subfloor conditions reviewed and accounted for
- Prep charges clearly itemized (not buried)
- Crew type and labor cost aligned with scope

E. Final Sanity Check

- Price aligns with scope — no “too good to be true” numbers
- Margin reviewed for reasonableness
- Nothing included “just to get the deal”
- If manager input was needed, it was requested before quoting

SECTION 4 — SALES SIGN-OFF

By signing off, I confirm this quote reflects the agreed scope, accurate pricing, and known risks have been addressed.

Salesperson Name:

Date Completed:

SECTION 5 — MANAGEMENT ENFORCEMENT

This checklist is not approved line-by-line by management. Instead:

- Sales is accountable for completion.
- Management spot-checks files regularly.
- Missing or careless checklists trigger coaching.
- Repeated misses trigger corrective action.

RULE: If it's not in the job file, it didn't happen.

This system exists to reduce callbacks, protect margin, and remove preventable chaos — not to slow sales down.

You don't fix profit by working harder. You fix it by designing better guardrails.

Created by Matt Shelton

Systems-built clarity for flooring businesses

Operator experience. Ethical execution. Practical results.

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