

# 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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