

Contractor Estimate Template

If you are a contractor who provides services to meet the demands of a project, you should provide your customers with an estimate of your pricing before beginning any job. Whether you provide lawn care, plumbing, remodeling, or even services that are not related to home care and construction, you can use this template to develop estimates for your work.

By providing an estimate, you give the customer your initial thoughts on how much each activity in the project will cost. This helps guide the customer's expectations and reduces the possibility of misunderstandings about pricing once the work has begun. For this reason, you should always send your estimates to the customer in writing, either as a hard copy or electronically by email.

Estimates do not necessarily specify the actual final price for the completed job. Changes might occur as you gather additional information from the customer or when unexpected complications or additional work becomes apparent as you proceed with the job.

HubSpot Tip: Many contractors use estimates in conjunction with quotes, which provide a more detailed, formal, and often final version of your pricing. Be sure not to confuse estimates and quotes, as they serve different purposes and have carry legal standing.

Contractor Information

This section provides basic information on the contractor and tells the customer who to contact with questions. Include the following basic data:

Contractor: Insert your company's full name.

Street Address: Include your company's mailing address, including the zip code.

Estimated By: Enter the name of the person who developed the estimate.

Phone Number: Choose a number that will quickly connect the customer to the person who developed the estimate so they can answer any questions.

Email Address: Include the email address of the person who developed the estimate.

HubSpot Tip: It is important to make it as easy as possible for your customer to contact you with any questions they have as they review the quote. The sooner that you can address their questions, the sooner the work can begin.

Estimate Identification

Provide details on the specific estimate you have developed for this job, including the name of the project and the location of the project site.

Project Name: Often projects are given names to help the contractor identify and keep track of them. If your job has a name, include it here.

Site Location: Sometimes the location of a project is a good way to identify it. If this applies to your project, include the location here.

Estimate Number: Some contractors keep track of all of their estimates with a numbering system. If your organization does this, enter the number here.

Date: Enter the date you will send the estimate to the customer, including the day, month, and year.

HubSpot Tip: Whether or not you use a numbering system to track your estimates, you should keep a copy of any estimate you issue. As a contractor, you never know when you might need to reference a past estimate.

Customer Information

Add the contact information of your customer in this section.

Contact Name: Insert the name of the person to whom you are sending the estimate.

Organization Name: Enter the name of the customer company.

Street Address: Enter the customer's street address, including the zip code.

Customer Account Number: Some contractors assign customer account numbers for tracking purposes. If your firm does this, include the account number here.

HubSpot Tip: If you would find it useful, you can also include the phone number and email address of your customer in this section. However, this is not necessary information for the estimate.

Description of Job

Include a brief explanation of the goals of the project. Only a few sentences are necessary, but you should document what you know about the project and what you expect it to entail.

HubSpot Tip: As stated above, the estimate is just a first step in developing the cost structure for your project. So, you do not need to include a lot of details in the description. After gathering additional information from your customer, you will incorporate more specifics into your formal quote.

Estimated Construction Costs

Be as clear as possible about the costs of the various products and services necessary for the job. In an estimate, it is acceptable to describe the work in general terms, knowing that a more detailed quote will be prepared later. Be sure to include a disclaimer stating that the price is subject to change.

Product or Service	Quantity	Unit Price	Amount
Service Fee	1	\$200.00	\$200.00
Service 1 per hour	10	\$100.00	\$1,000.00
Service 2 per hour	20	\$200.00	\$4,000.00
Product 1 in units	10	\$50.00	\$500.00
Subtotal			\$5,700.00
Tax			N/A
Total Quote			\$5,700.00

HubSpot Tip: If you are required to charge value-added tax (VAT), be sure to include it in your estimate.

Estimate Acceptance

Explain to whom and how (usually by email or fax) the customer should send the signed estimate upon their acceptance of the estimate. Consider including customized signature lines for everyone who needs to sign, like shown below.

[Name], [Role] [Name], [Role] [Name], [Role]

HubSpot Tip: Make it easy for your customer to return the signed estimate by making the instructions clear and simple.