CLIENT & PROJECT READINESS CHECKLIST

A fair pre-quote check for builders and contractors

Use this checklist before committing significant estimating time or issuing a quotation. It helps determine whether the project information, client expectations and commercial arrangements are sufficiently clear to price the work fairly. It is a project-readiness tool, not a credit check or personal assessment.

1. CLIENT & PROJECT DETAILS

Client / Organisation

Main Contact

Project Address

Telephone

Email

Project Description

2. PRE-QUOTE PROJECT READINESS

1	Is the client clear about the work they want priced?	☐ Yes	☐ No	☐ N/A
2	Are drawings, specifications and schedules sufficiently developed to prepare a meaningful quotation?	☐ Yes	☐ No	☐ N/A
3	Have structural, architectural and specialist design requirements been identified where applicable?	☐ Yes	☐ No	☐ N/A
4	Are planning permission, Building Regulations and other required approvals understood or progressing?	☐ Yes	☐ No	☐ N/A
5	Are important client selections, finishes and product expectations identified or appropriately allowed for?	☐ Yes	☐ No	☐ N/A
6	Is there a clear process for clarifications, assumptions and exclusions within the quotation?	☐ Yes	☐ No	☐ N/A
7	Has the client explained the target programme and is it realistic for the proposed scope?	☐ Yes	☐ No	☐ N/A

2. PRE-QUOTE PROJECT READINESS - CONTINUED

#	Question	Yes	No	N/A
8	Is access to the property/site understood, including parking, deliveries, working hours and restrictions?	☐ Yes	☐ No	☐ N/A
9	Has the client identified whether the property will remain occupied during the works?	☐ Yes	☐ No	☐ N/A
10	Are known site constraints, existing defects, asbestos information or other relevant property information available?	☐ Yes	☐ No	☐ N/A

3. COMMERCIAL & CONTRACT EXPECTATIONS

#	Question	Yes	No	N/A
1	Has the client confirmed that a realistic project budget or funding arrangement is in place?	☐ Yes	☐ No	☐ N/A
2	Is the client willing to discuss a written building contract before work starts?	☐ Yes	☐ No	☐ N/A
3	Are deposit, stage payment or valuation arrangements understood in principle?	☐ Yes	☐ No	☐ N/A
4	Does the client understand that additional or changed work may affect both price and programme?	☐ Yes	☐ No	☐ N/A
5	Is the client willing to record significant variations in writing before work proceeds where reasonably possible?	☐ Yes	☐ No	☐ N/A
6	Does the client understand that quotations rely on the information available and stated assumptions/exclusions?	☐ Yes	☐ No	☐ N/A
7	Is there a clear decision-maker with authority to approve selections, variations and payments?	☐ Yes	☐ No	☐ N/A
8	Are expectations around provisional sums, allowances and client-supplied items understood?	☐ Yes	☐ No	☐ N/A
9	Does the client appear prepared to make required decisions and provide information by agreed dates?	☐ Yes	☐ No	☐ N/A
10	Are expectations around defects, snagging, practical completion and access for remedial work reasonable?	☐ Yes	☐ No	☐ N/A

4. COMMUNICATION & WORKING RELATIONSHIP

1	Are communication channels and key contacts clear?	☐ Yes	☐ No	☐ N/A
2	Is the client willing to keep important instructions and approvals in writing?	☐ Yes	☐ No	☐ N/A
3	Does the client understand that direct instruction of subcontractors can create confusion and contractual risk?	☐ Yes	☐ No	☐ N/A
4	Are expectations for site visits, progress updates and meetings reasonable and practical?	☐ Yes	☐ No	☐ N/A
5	Is there mutual understanding that both parties should act fairly, communicate promptly and follow the agreed contract?	☐ Yes	☐ No	☐ N/A

5. CONTRACTOR DECISION

☐ Proceed to quotation ☐ Request further information first ☐ Do not quote

Key Clarifications / Information Required

Commercial / Programme Concerns

Estimator / Reviewer	Review Date	Quote Ref.

6. NOTES FOR FAIR PROJECT QUALIFICATION

A 'No' answer does not automatically mean the project should be rejected. It may simply identify information, decisions or commercial arrangements that need to be resolved before a reliable quotation can be prepared. Apply the checklist consistently and only to factors relevant to the project, contract and ability to deliver the work fairly.

Important

Do not use this checklist to assess a client based on protected or irrelevant personal characteristics. If financial assurance is genuinely necessary for a substantial project, use proportionate and lawful commercial checks and apply them consistently.