SALES AND FINANCE

Estimate review checklist

A practical review before an estimate goes out, covering cost, effort, assumptions, terms, and the client decision path.

A practical worksheet from Stelaah

Use it, adapt it, and save it with the client work it supports.

HOW TO USE THIS

You want to check an estimate before it becomes a commitment.

WORK THROUGH THE CHECKLIST

- [ ] 01 **Check quantities and rates**
- [ ] 02 **Include tax assumptions if relevant**
- [ ] 03 **Match scope to the estimate**
- [ ] 04 **Set expiry date**
- [ ] 05 **Confirm payment schedule**
- [ ] 06 **Proof the client-facing summary**

Before you close this

Name one owner, one next action, and one date. A worksheet only helps when the next commitment is visible to the people doing the work.

Notes and decisions

Use this page to record what changes after you work through the checklist.