

Before You Quote

WORKSHEET / Start with the essentials

Fill in a form-capable PDF reader or print and write. Use a separate copy for each job or assignment.

What is the job?

Name the service and the result. Keep it specific.

How much work, and how often?

Area, item count, rooms, or deliverables; one visit or recurring.

What is included?

List the actual tasks, preparation, and cleanup you will provide.

What does finished look like?

Describe what you and the customer can check at completion.

What are the conditions and access arrangements?

Condition, gates, stairs, parking, working hours, or obstacles.

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WORKSHEET / Finish the boundaries and supporting details

Fill in a form-capable PDF reader or print and write. Use a separate copy for each job or assignment.

Who supplies what, and what must be ready?

Parts, water, power, supplies, cleared areas, or customer preparation.

What is not included?

Name exclusions. Write None if there are no exclusions.

What happens if the job changes?

Who approves added work and its price before you proceed?

Customer / site reference (optional)

Use a reference instead of private contact details on shared devices.

Service window or schedule (optional)

Record the agreed visit window or recurring schedule.

Costs to include when pricing (optional)

Travel, preparation, supplies, equipment, disposal, or extra labor.

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WORKED EXAMPLE / Adapt to the real work

Illustrative example only. Use the actual conditions, team, and agreed requirements.

What is the job?

Mow, trim, and edge a maintained residential lawn

How much work, and how often?

Approximately 10,890 sq ft; one visit every two weeks

What is included?

Mow accessible grass; trim around beds and fence; edge driveway and sidewalk; blow clippings off hard surfaces.

What does finished look like?

Accessible lawn is evenly cut; agreed edges are tidy; clippings are cleared from driveway and sidewalk.

What are the conditions and access arrangements?

Maintained grass, flat access, standard gate. Customer keeps pets inside and removes toys and loose objects.

Who supplies what, and what must be ready?

Provider supplies mower, trimmer, and fuel. Customer confirms gate access before arrival.

What is not included?

Tree work, landscaping, heavy debris, dog waste removal, and hauling are not included.

What happens if the job changes?

If growth or obstacles change the scope, pause and obtain the customer's approval of revised work and price before proceeding.

Customer / site reference

Sample residential property

Service window or schedule

Every other Tuesday; weather changes confirmed with customer

Costs to include when pricing

Include travel, fuel, equipment allowance, edging, trimming, and cleanup time.

This worksheet is a scope-planning aid, not a contract. Confirm permissions, safety, licensing, price, and other terms separately.