

Learning Expectations

- After this presentation you should gain a high-level understanding of the estimating process
- Be introduced to the estimating tools used during the process
- Know where to find the tool templates on the server
- Be able to confidently speak about the estimating process

- Handoff from Sales to Estimating
- Set Expectations
- Review Plans
- Review Specifications

Kickoff Meeting

Spec Review Meeting

- Discuss specifications in an open forum
- Complete spec review checklist

- Identify quotes needed
- Setup vendor/sub folders on server
- Begin creating RFQ packages to get information to vendors for quoting as quickly as possible

Identifying Estimate Needs

- •Set drawings up in LiveCount and AccuBid
- •Count fixtures, devices, and gear
- •Roll off the linear footages branch and feeders
- •SLD counted
- •Fixture quantities sheet
- •Feeder length spreadsheet

LiveCount Takeoff

Basis of Takeoff

- •Create Basis of Takeoff
- •Content includes the following:
- ➤ General Assumptions
- ➤ Scope of Responsibility
- ➤ General Issues
- ➤ Drawing Specific assumptions
- ➤ Drawing Specific issues
- **≻**Clarifications
- ➤Open Items

- •Create/complete RFQ packages
- •Contents of packages should include:
- ➤ RFQ spreadsheet showing the desired breakout
- ➤ Link to specifications and drawings
- > Detailed scope of work if sending to subcontractors

RFQs

- Intent of meeting is to make sure estimators are capturing quantities in a manner that accurately reflects the work
- Page flip in LiveCount
- Estimators present their work using LiveCount and their BOTO

Mid-Estimate Review

Receive Quotes

- Receive quotes and copy email and attachment (separately) into respective vendor folders on server
- Review quotes and mark them up
- Call vendor/sub if there are any questions regarding quote or scope
- Level quotes in the Vendor Quote Recap spreadsheet for review with chief estimator
- Post best value quote in AccuBid

- •Set base wage rates
- Factor labor according to job conditions
- Build indirect staff
- Capture associated job costs (general expenses)
- Select equipment needed for job
- Review Sub and Otd Material tabs to ensure correct vendor pricing has been entered and the correct vendor has been selected
- Set OH and markup percentages

AccuBid Recap

- Review LiveCount drawings at a high level to ensure continuation of takeoff per direction given during the Mid-Estimate Review
- 80/20 Checks quantities, material cost, and labor
- Wire versus Conduit checks
- Conduit versus Fitting checks
- Trade Services pricing update
- Check "Halted" items
- Review Quotes selected with chief estimator
- Review Bid Recap with chief estimator
- Review Pricing Proposal with chief estimator
- Review Bid Forms

Final Estimate Review

Estimate Closeout

- Send pricing proposal to desired GCs make sure it is sent and/or uploaded in the correct format and to the right person
- Print Bid Reports (Report 10 and 14)
- Review Estimating Binder for completion see estimate binder checklist
- Make sure all last-minute quotes have been saved to the server for future reference
- Save all important email communications into correct vendor/sub folder for traceability
- Server should reflect Estimate Binder content

- Prepare separate Estimating Binder for Operations
- Complete digital copy using the Turnover Folder on server
- Ensure traceability, transparency, and thoroughness is carried through
- Ensure binder is easy to follow and accurately reflects pricing and labor in AccuBid
- Have print outs of fixture counts, homerun layouts, and feeder routings available for review

Estimate Turnover