④ Quotes and Proposals

A professional quotation or sales proposal is one of the most powerful tools a tradesperson can use to win work, build trust and standout from the competition. It's not just about the price – its about showing the customer you are organised, transparent and serious about quality

- Present all information professionally through the use of templates or forms
  - Never send one line emails – demonstrates lack of engagement and looks unprofessional

- Ensure Clear Branding and Contact Info – shows professionalism and builds trust
  - Business name & Logo
  - Address, Phone, Email and Website
  - Licence numbers (if applicable)

- Include Client Details
  - Customer name, address & contact info
  - Site address if different from postal address – makes it personal and accurate

- Include Date and Quote Reference Number
  - provides reference for both parties

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④ Quotes and Proposals (continued)

- Detail Complete Scope of Works
  - Provide a detailed breakdown of what is included
  - Clearly mention site preparation, materials, labour, clean up, etc
  - Do not generalise terms like "general work"
  - Detail any exclusions clearly

- Provide a Clear Pricing Structure
  - Itemised pricing (Labour, materials, equipment hire, etc)
  - Provide Subtotals and Total amount incl. and excl. GST
  - Optional items or add-ons need to be clearly identified and shown separately
  - Transparency in pricing prevents disputes and builds credibility

- Exclusions and Assumptions
  - Clearly list anything not included
  - State any assumptions (e.g. power is available on site)
  - Clarity avoids scope creep and misunderstandings later

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④ Quotes and Proposals (continued)

- Detail Proposed Timeline and Availability
  - Provide an estimated start date or availability
  - Provide an estimated duration of the work
  - Customers want to know when you can start and how long the job will take.

- Clearly Outline Payment Terms
  - Fully detail any deposit requirements (a good option in current markets)
  - Detail Progress Payments (if applicable)
  - Detail Final Payment terms
  - Ensuring you have full agreement on payment terms assist you with cash flow

- Terms and Conditions
  - Detail all Warranty info
  - Clearly identify the validity of the quote and its expiry date
  - Detail any cancellation or variation terms
  - Ensure your quotation terms are both fair and professional

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④ Quotes and Proposals (continued)

- Ensure Proposals and Quotations are Friendly & Professional
  - Personalise the proposal with a short message
    - "Many thanks for the opportunity to present our proposal for your electrical upgrade…"
  - Invite the customer to ask questions if they are unsure of anything or unclear on the details
  - Include your name and direct contact details
  - Be approachable and accessible

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