

AI Estimate Review Checklist

A pre-proposal review for manual, digital, and AI-assisted estimates

Use this before you rely on an estimate.

This is not a pricing formula and does not replace trade judgement, site verification, scope review, supplier inputs, or proposal approval. Its job is to make the final review visible.

01 • SOURCE PACKAGE

Confirm the inputs

- ☐ I have the current drawings, addenda, relevant specifications, and owner or client inputs.
- ☐ I know which document version is governing the estimate.
- ☐ I reviewed plans for notes, details, legends, and scope signals that a count alone may not capture.
- ☐ I listed incomplete, unclear, or contradictory information that needs a decision before pricing.

02 • TAKEOFF OUTPUT

Check the quantities

- ☐ The drawing scale and measurement method are appropriate for the documents provided.
- ☐ I can trace important quantities back to a source sheet, detail, markup, or input.
- ☐ I manually checked the quantities most likely to affect price, labor, material, or schedule.
- ☐ I reviewed plan revisions and confirmed what changed from the prior version.
- ☐ If automation was used, I identified what it did not capture or what required correction.

03 • SCOPE

Make the work explainable

- ☐ The included work is written in language the team can explain.
- ☐ Allowances, selections, alternates, and client decisions are separated from fixed scope.
- ☐ Exclusions, qualifications, and unresolved items are visible rather than implied.
- ☐ Required trades, permits, inspections, protection, access, and cleanup have been considered.
- ☐ Existing conditions or field-verification needs are documented for remodel work.

Review before the proposal goes out

The estimate is still a business decision—not just a quantity output.

04 • BUSINESS INPUTS

Apply cost logic deliberately

- ☐ Labor assumptions and production factors are current and owned by the business.
- ☐ Material pricing, supplier quotes, lead times, waste, and availability have been reviewed.
- ☐ Equipment, subcontractor, overhead, contingency, and margin logic are visible to the person approving the estimate.
- ☐ I did not treat a quantity output as a complete client price without applying the business's own cost logic.

05 • PROPOSAL HANDOFF

Create an accountable next step

- ☐ A named person reviewed the final estimate and can explain the major assumptions.
- ☐ The proposal states the next step, expected decisions, and any conditions that could change the price.
- ☐ The client receives a clear way to ask questions, approve, or schedule the next conversation.
- ☐ The opportunity has an owner for follow-up after the proposal is sent.

Stop and resolve the issue before relying on the estimate if...

the source documents are outdated; scale is uncertain; scope cannot be explained; a major quantity cannot be traced; selections are unresolved; or existing conditions could materially affect the work.

What the workflow should make easier

ASSIST

Organize documents, locate information, quantify a first pass, and structure repetitive work.

REVIEW

Validate scope, quantities, conditions, pricing, exclusions, risk, and the proposal the company can support.

Review record

Project /		Date	
opportunity			
Estimator		Reviewer	
Proposal owner		Next step	

Use the terms consistently

MANUAL Human-led measurement and quantity review from source documents.

DIGITAL Calibrated drawings, measurement tools, markups, and structured exports.

AI-ASSISTED Automation can support a first pass; a person still validates and approves.

Need a clearer estimating-to-proposal workflow?

Request a BuildModern Strategy Session at buildmodernmedia.com/strategy-session