

BUILDERMATE

The Construction Estimate Template

A ready-to-use framework for creating accurate,
professional estimates that win more jobs.

By BuilderMate | bldrmate.com

Why Your Estimates Are Losing You Money

Most contractors leave 15-25% of potential profit on the table because of inconsistent, incomplete estimates. Missing line items, underestimating labor, and forgetting to account for overhead are the three most common mistakes that eat into your margins.

This template gives you a proven framework to create accurate, professional estimates that cover every cost category and present a polished image to your clients.

Pro Tip: Contractors who use structured estimate templates report winning 20-30% more bids because clients perceive them as more professional and trustworthy.

Section 1: Estimate Header

Every professional estimate starts with clear identification. Fill in these fields for every estimate you send:

Field	Example	Notes
Company Name	ABC Roofing LLC	Include your logo if possible
License #	ROOFLIC-12345	Builds instant credibility
Estimate #	EST-2026-0142	Sequential numbering for tracking
Date	02/24/2026	Always date your estimates
Valid Until	03/24/2026	30 days is standard
Client Name	John Smith	Full name and company if applicable
Project Address	123 Oak St, Austin TX	Job site, not mailing address
Scope of Work	Full roof replacement...	2-3 sentence summary

Section 2: Cost Categories Breakdown

Break every estimate into these five categories. This ensures you never miss a cost and gives your client a clear picture of where their money goes.

Category	Line Items to Include	% of Total
----------	-----------------------	------------

Materials	Lumber, concrete, fixtures, fasteners, supplies, delivery fees	35-50%
Labor	Crew hours, subcontractor bids, overtime estimates	25-40%
Equipment	Rentals (excavator, scaffolding), fuel, wear and tear	5-15%
Overhead	Insurance, permits, dumpster, office costs, vehicle	10-15%
Profit Margin	Your markup on top of all costs	10-20%

Pro Tip: Always add a 5-10% contingency line item for unexpected costs. Clients respect the transparency and you avoid eating into your profit when surprises come up.

Section 3: Sample Estimate Layout

Here is how a complete estimate should look when you present it to a client. Adapt these line items to your trade.

#	Description	Qty	Unit	Rate	Total
1	Remove existing shingles and underlayment	24	SQ	\$85	\$2,040
2	Install synthetic underlayment	24	SQ	\$45	\$1,080
3	Install architectural shingles (GAF Timberline)	24	SQ	\$175	\$4,200
4	Replace damaged decking (estimate)	4	Sheet	\$65	\$260
5	Ridge vent installation	40	LF	\$12	\$480
6	Flashing (chimney, valleys, drip edge)	1	Lot	\$650	\$650
7	Cleanup and haul-off	1	Job	\$400	\$400
				Subtotal	\$9,110
				Permit Fee	\$275
				Contingency (8%)	\$729
				TOTAL	\$10,114

Section 4: Terms and Conditions Template

Always include terms and conditions at the bottom of your estimate. Here are the essential clauses every contractor should include:

Payment Terms: 50% deposit required to schedule work. Balance due upon completion. For projects over \$10,000: 40% deposit, 30% at midpoint, 30% on completion.

Change Orders: Any changes to scope after acceptance will be documented in a written change order with adjusted pricing before work begins.

Timeline: Estimated start date within 2 weeks of deposit. Weather delays, material backorders, and permit timelines may affect schedule.

Warranty: All workmanship warranted for [X] years. Manufacturer warranties apply to all materials and will be provided upon completion.

Permits and Inspections: [Company name] will obtain all required permits. Client responsible for HOA approvals if applicable.

Cancellation: Client may cancel within 3 business days of signing. After 3 days, deposit covers scheduling and material procurement costs.

Pro Tip: Send estimates within 24 hours of the site visit. Speed signals professionalism and dramatically improves your win rate. With BuilderMate, you can send estimates from the job site in minutes.

Section 5: 7 Estimate Mistakes That Cost You Jobs

1. **No line-item breakdown** -- Clients want to see where their money goes. A single lump sum looks like you are hiding something.
2. **Forgetting overhead costs** -- Insurance, fuel, office costs, and vehicle expenses eat into your margins if you do not account for them.
3. **Underestimating labor** -- Always pad labor by 10-15%. Projects almost never go exactly as planned.
4. **No expiration date** -- Material prices change. An estimate without an expiry date is a liability.
5. **Sloppy formatting** -- Handwritten or poorly formatted estimates signal an unprofessional operation.
6. **No follow-up system** -- 60% of estimates need 2-3 follow-ups before converting. Track every estimate you send.
7. **Missing your differentiator** -- Include a brief section on why you over the competition (warranty, reviews, speed).

Ready to Streamline Your Business?

BuilderMate is the all-in-one CRM and project management platform built specifically for contractors. Manage leads, estimates, invoices, scheduling, and profitability in one place.

Start Your Free Trial at bldrmate.com

bldrmate.com | Free trial, no credit card required