



# Estimating: getting the bid right



*By Frank Gregg, president of Gregg Software*

In today's market, some residential subcontractors are considering commercial work, which can have a stricter set of guidelines causing the estimator to read, think and act from the legal point of view. Specifications need to be scrutinized closely.

Many specifications are not specific to your job but are copied by the architectural specification writer from other projects. When written instructions at bid time differ from what is needed on the project installation, you are at risk. Be sure information is clarified and inserted in your qualifications of inclusions and exclusions.

Make sure your bid is complete. Omissions in your bid create unknown costs that may cause it to be tossed. The person taking your bid can be under a lot of pressure to get their bid right and not have time to figure all your issues out at crunch time.

Conduct due diligence with your plan and specification. Don't confine your review to the 4000 section (masonry

and stone items) or section 9000 (finishes for ceramic tile and stone). Look at other sections that might explain issues that apply to your part of the job. For example, if another section specifies another party is responsible for waterproofing and caulking, you shouldn't include it in your bid.

Read the instructions to bidders on the main project specification bid proposal. Introductory sections have terms and conditions that you must include in your bid such as insurance, allowances, special breakouts and phasing for the quotation to apply.

### **Details and drawings**

There are many takeoff do's and don'ts. Know the plans and details before you start. Color-coding your plans according to material type makes them easier to reference. Ditto for wall heights. Transfer every item from the detail pages to the floor plan before you measure the job. Make sure all tile is accounted for – in light coves,



behind mirrors or around corners. Look for attachment details, installation information and other items that can affect your bid. If you can't find a detail drawn on the plans, beware. Find out what the detail is for from the architect or contractor.

When measuring, try to avoid elevations when you can. Elevations make returns and angled wall lengths hard to measure properly. Mark the floor plan wall lines by wall height from the elevations and details, then measure them by length and height. Review and list all drawings to clarify items included in the bid. Check the all the drawings for your materials like the site drawings.

### **Bid proposal issues**

Your standard bid proposal template should include all the options you'll use on any bid. Like the contract you will get, bid items include anything that needs identification, like job name and address, architect, plan dates, plan page numbers, addenda's, revisions and the specification sections you are bidding. List all your inclusions and exclusions. Omissions from your sections complicate things for the bid taker and may result in your bid being rejected. Voluntary cost saving options and alternatives should be written separately so the contractor knows you can help with budget pricing problems and can report potential saving to the owner as soon as possible. Protection clauses should clarify that stone can include beauty marks and veining, ceramic tile can include shading and variations, and cement curing alterations in grout color.

### **When you get the job**

When your contract arrives be sure it says exactly what you priced and qualified. Be sure you can live with insurance, bonding, timing and any other fine print items. Get submittals ready early to avoid late approvals and deliveries and make sure they look like what you will install. Special conditions like shower pan prep and other work requiring backup material should be clear with complete details before building them to avoid re-work. Clients appreciate those efforts and will want you back.

Getting to know the architects will help you understand the job issues better than your competitors. Offer your estimating services to help the architect draw the work within the owner's budget in the prelim stages. It may help to have an estimating program – check with the NTCA for estimating programs that work.

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*Frank Gregg is an estimating software developer who creates special takeoff and pricing programs for the ceramic tile, stone fabrication and stone installation industry. He teaches accounting and cash flow and consults accounting departments in job cost. He has taught over 1600 estimators and has over 400 companies using software since 1998. From 1970 thru 1994 he was president of Narciso Tile and Stone in Houston, Texas doing high rise buildings and large commercial projects for exterior stone and ceramic tile projects and had a fabrication shop. Contact him at Gregg Software Incorporated, [www.greggssoftware.com](http://www.greggssoftware.com); [frank@greggssoftware.com](mailto:frank@greggssoftware.com) or phone (713) 854-4489.*

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