

## Free Quote Review Checklist

*The free standalone piece. Run your next quote against this list before you send it. Each item below has a one-line fix.*

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- 1. Open-ended support.** *Red flag:* “Includes ongoing support” with no end date or hour limit. *Fix:* Name a specific support period or hour allotment, then price anything beyond it separately.
  - 2. No acceptance criteria.** *Red flag:* The quote says what you’ll deliver but never says what “done” looks like. *Fix:* Spell out the acceptance criteria and the review window in writing, before work starts.
  - 3. Verbal or email-only changes.** *Red flag:* Scope changes get agreed to on a phone call or in a quick email reply, with nothing formalized. *Fix:* Require every scope change to go through a signed change order before work begins.
  - 4. No cancellation fee.** *Red flag:* The client can walk away mid-project and you’ve already committed time and materials with nothing to show for it. *Fix:* Set a cancellation fee in advance, in the quote — a flat amount or a percentage of contract value, stated before work starts, not negotiated after.
  - 5. Net-90 (or longer) from a first-time client.** *Red flag:* Extending long payment terms to someone with no payment history with you. *Fix:* Start first-time B2B clients at shorter terms (example: Net-30), and extend longer terms only once there’s a track record.
  - 6. “Or equivalent” materials with no approval step.** *Red flag:* The client’s spec allows substituting “or equivalent” materials, which can mean anything if left undefined. *Fix:* Use “or approved equal, subject to prior written approval” — substitutions are allowed, but only with your sign-off first.
  - 7. Unlimited revisions.** *Red flag:* “Revisions included” with no cap — scope creep disguised as customer service. *Fix:* Cap revisions at a stated number of rounds (example: two), with additional rounds billed separately.
  - 8. Undefined IP ownership transfer trigger.** *Red flag:* The quote never states exactly when ownership of the design, code, or work product transfers to the client — so the client assumes it transfers on any payment, while you assume it transfers only at the end. *Fix:* State the exact trigger in writing — for example, “ownership transfers upon receipt of final payment in full,” not upon deposit or upon delivery of a draft.
  - 9. Changes requested by email with no log.** *Red flag:* Small change requests pile up in email threads with nobody tracking whether they add up to real added cost. *Fix:* Keep a running log of every request that comes in after work starts, even small ones, so scope drift doesn’t go unnoticed.
  - 10. No validity window.** *Red flag:* A quote with no expiration sits open forever, so the client can accept it months later at prices that no longer reflect your costs. *Fix:* Put a validity window on every quote (example: 30 days from the quote date).
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**Want the full quote template, scope-of-work template, and change-order kit that put these fixes into practice?** This checklist is the free piece of a larger pack built for small technical shops.

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*This checklist is a template for general business use. It is not legal advice. Every example above should be adjusted to your own pricing, terms, and risk tolerance.*