

ESTIMATING KICK OFF MEETING

Once an Invitation to Bid (ITB) is received by the contractor, the management must decide if the company will bid that project or not, commonly known as Bid/No Bid Process. If the company decides for bid it the next step should be the preparation of an Estimating Kick off meeting.

The main purpose of the estimate kick off meeting is to ensure alignment between customer, in this case upper management, and the estimating team before the estimate process starts. Additionally during the kick off meeting any pertinent information about the project is shared with the estimating team, and upper management must set up expectations regarding estimate accuracy, format and documentation.

The preferred Estimate Kick off Meeting should be prepared by the Proposal Manager assisted by the project Lead Estimator and proposed Project Manager. In small projects/companies a dedicated Proposal Manager may not be available and this role usually is performed by Project Manager or Estimating Manager. At the kick off meeting technical and commercial considerations are reviewed and assignments of responsibilities are made. The following items should be discussed and agreed during the meeting:

- 1- Scope summary should be presented.
- 2- Proposal Manager will present the list of deliverables requested on the Invitation to Bid.
- 3- Any special or unusual services that are required on the scope of work must be identified and correctly addressed to be accurately estimated.
- 4- The team must identify any impacts that project location may have on estimate and schedule, like craft availability for example.
- 5- Define specific taxes, labor rates and per diem that will be used on the estimate.
- 6- Define work week schedule strategy. (5-10's, 6-10's, Etc)
- 7- Cost estimator must present how the take-off will be performed and how the estimate will be developed, the estimate format and breakdown. Usually estimate breakdown should follow the client's bid form breakdown.
- 8- Cost estimator must present the list of subcontractors and material suppliers that he is planning to submit Request for Quotes (RFQ). Project team should validate the list.
- 9- Timeframe to develop the estimate must be presented, project team should analyze and verify if the timeframe allows sufficient time for preparing, reviewing, approving, printing and delivering the proposal. If time is not enough, due date extension request will be required.
- 10- Project Manager should present the project organization chart to be included on the proposal.
- 11- Proposal Manager will review the list of deliverables requested on the Invitation to Bid and make sure that each deliverable has been correctly assigned to the project team members.
- 12- Meeting notes should be sent to all participants.