



## Pre-Construction Survey Sales/Estimating

Project: \_\_\_\_\_

Survey Date: \_\_\_\_\_

Customer: \_\_\_\_\_

Completed By: \_\_\_\_\_

Title: \_\_\_\_\_

### Rating Scale:

- 1 = Far Below Expectations
- 2 = Somewhat Below Expectations
- 3 = Met Expectations
- 4 = Exceeded Expectations
- 5 = Far Above Expectations

**Rank Top  
3 Most Important Questions  
By Section  
1 = Most Important**

### Sales/Estimating

### Circle Rating Choice Below

How did we handle contract negotiations and scope review?

5 4 3 2 1

\_\_\_\_\_

Subcontract turn around

5 4 3 2 1

\_\_\_\_\_

Estimator's technical knowledge  
(knowledge of products/methods/materials)

5 4 3 2 1

\_\_\_\_\_

Accuracy and completeness of proposal

5 4 3 2 1

\_\_\_\_\_

Request for clarification process

5 4 3 2 1

\_\_\_\_\_

Professionalism

5 4 3 2 1

\_\_\_\_\_

Risk management/Value engineering

5 4 3 2 1

\_\_\_\_\_

Responsiveness (handle issues, cost related or not,  
in a timely manner)

5 4 3 2 1

\_\_\_\_\_

Teamwork/Cooperation (with Contractor/Architect)

5 4 3 2 1

\_\_\_\_\_

Provided scheduling input

5 4 3 2 1

\_\_\_\_\_

### Communication

Written

5 4 3 2 1

\_\_\_\_\_

Verbal

5 4 3 2 1

\_\_\_\_\_