

Estimating Assumptions and Exclusions Template

Keep uncertainty visible from internal review to customer-facing quote

PROJECT / RFQ	CUSTOMER	REVIEWER	DATE

How to use: confirm the controlling evidence, record exceptions in the response column, assign an owner, then preserve the reviewed copy with the quote record. Example entries are illustrative and must be replaced.

Assumption register

DONE	REVIEW POINT	EVIDENCE / RESPONSE	OWNER / STATUS
☐	Affected scope		
☐	Missing or uncertain information		
☐	Working basis		
☐	Evidence and cost impact		
☐	Owner and review status		

Exclusion register

DONE	REVIEW POINT	EVIDENCE / RESPONSE	OWNER / STATUS
☐	Excluded work or responsibility		
☐	Reason and source		
☐	Interaction with included scope		
☐	Approved customer wording		

Allowance review

DONE	REVIEW POINT	EVIDENCE / RESPONSE	OWNER / STATUS
☐	Item covered		
☐	Amount or rate basis		

DONE	REVIEW POINT	EVIDENCE / RESPONSE	OWNER / STATUS
☐	Trigger for refresh		
☐	Required approval		

Issue alignment

DONE	REVIEW POINT	EVIDENCE / RESPONSE	OWNER / STATUS
☐	Internal treatment reviewed		
☐	Quote wording approved		
☐	No conflict with options or inclusions		
☐	Resolved items closed without deleting history		

Worked example

Type: Assumption
Affected scope: Powder coating
Gap: Final colour and coating specification not supplied
Working basis: Standard single-colour finish from current supplier budget quote
Customer treatment: Price subject to confirmation when the coating specification is issued.

Review decision

DECISION	REQUIRED ACTION / CONDITION	APPROVER / DATE
Proceed / Clarify / Hold / Decline		

Method and limitations

Kwantflow prepared this resource as a practical, estimator-led workflow aid. It does not determine legal obligations, engineering adequacy, manufacturability, contract risk, tax treatment, production instructions, or the correct commercial decision. Preserve source evidence and record accountable human review.