CONCRETE CONTRACTORS · PRECONSTRUCTION ESTIMATING

Job estimate and bid preparation

This workflow automatically generates accurate job estimates and competitive bids for concrete projects by integrating takeoff measurements, cost calculations, and proposal generation. It reduces estimate preparation time by 60% while improving bid accuracy and win rates.

01 WORKFLOW TRIGGER

New project blueprints uploaded to project management system or RFQ received from potential client

BLUEPRINT OVERVIEW

What this workflow accomplishes

This workflow connects PlanSwift and STACK takeoffs to ProEst cost databases, Sage 100 Contractor labor history, and Foundation Software proposal output, with the bid package landing in QuickBooks Contractor Edition for job setup. Automation handles quantity takeoff, unit pricing, labor hour projections, and document assembly. Estimators and the owner retain authority over scope interpretation, complexity calls, markup percentages, and the signature that releases the bid.

01

OUTPUTS

Itemized material and labor estimate, Branded bid proposal document, Pour schedule and milestone dates, Bid package logged to job file

02

SUCCESS MEASURES

Estimate turnaround hours, Bid win rate, Estimated versus actual job cost, Takeoff quantity variance

03

CORE SYSTEMS

PlanSwift, STACK Construction, ProEst, Sage 100 Contractor, Foundation Software, QuickBooks Contractor Edition

HOW TO USE THIS BLUEPRINT

Estimators: verify takeoff quantities against the plan sheets before costs are calculated, and flag any scope the software read wrong.

Owners and project managers: set the markup tiers and complexity triggers, then approve any bid above the dollar threshold you choose.

Implementation teams: connect the takeoff, cost, and accounting systems so unit prices and crew productivity feed forward without rekeying.

THE WORKFLOW

End-to-end stage map

Seven stages carry a set of plans from inbox to sealed bid package. The decision point at stage four governs whether a job runs on automated pricing or gets pulled onto a senior estimator's desk before markup.

IMPLEMENTATION DETAIL

Stage-by-stage breakdown

Each stage states the operational intent, the human control point, and the systems likely to take part. System names are examples, not a required architecture.

01 TRIGGER

Receive Project Plans

Digital blueprints or project specifications are uploaded to the system via email, customer portal, or direct file transfer. The system automatically creates a new project record and initiates the estimating process.

CONTROL POINT

The estimating coordinator confirms the plan set is complete, current revision, and that addenda and the bid due date are attached before the job number is issued.

SYSTEMS PlanSwift STACK Construction

02 ACTION

Generate Digital Takeoffs

AI-powered takeoff software analyzes blueprints to automatically measure concrete areas, volumes, and linear footage. The system identifies reinforcement requirements, formwork needs, and finishing specifications.

CONTROL POINT

An estimator reviews the takeoff overlay sheet by sheet and corrects any misread slab thickness, footing depth, joint layout, or rebar schedule before quantities lock.

SYSTEMS PlanSwift STACK Construction

03 ACTION

Calculate Material and Labor Costs

The system pulls current material prices and calculates quantities needed for concrete, rebar, forms, and accessories. Labor hours are estimated based on project complexity and historical crew productivity data.

CONTROL POINT

The estimator verifies the ready mix quote date, mix design, and pump line pricing, and adjusts crew hours where the historical productivity does not match this site.

SYSTEMS ProEst Sage 100 Contractor

04 DECISION

Evaluate Project Complexity

The workflow assesses if the project requires specialized equipment, has challenging site conditions, or needs custom concrete mixes. Complex projects route to senior estimators for review while standard projects continue automated processing.

CONTROL POINT

The senior estimator makes the final complexity call and can pull any job out of automated pricing regardless of what the score says.

SYSTEMS ProEst

COMPLETION AND MEASUREMENT

Closing stages and results

The closing stages assemble the priced proposal, log it against the job number, and hand the sales side a dated follow-up record.

05 ACTION

Apply Overhead and Markup

The system automatically adds company overhead, equipment costs, and profit margins based on project type and client tier. It factors in job duration, weather considerations, and current workload capacity.

CONTROL POINT

The owner or chief estimator approves the margin applied, and any reduction below the floor rate requires a written note on the bid record.

SYSTEMS Foundation Software · Sage 100 Contractor

06 ACTION

Generate Professional Proposal

A comprehensive bid document is created including itemized costs, project timeline, specifications, and terms. The proposal is formatted with company branding and ready for client delivery.

CONTROL POINT

The estimator proofs inclusions, exclusions, pour sequence, and payment terms against the spec before the document is marked ready.

SYSTEMS ProEst · Foundation Software

07 OUTPUT

Deliver Completed Bid Package

The finalized estimate and professional proposal are automatically sent to the client via email and uploaded to the project management system. Internal notifications alert the sales team that the bid is ready for follow-up.

CONTROL POINT

An authorized signer releases the bid to the general contractor and sets the follow up date; nothing leaves the office unsigned.

SYSTEMS Foundation Software · QuickBooks Contractor Edition

DELIVERABLES

- Itemized material and labor estimate
- Branded bid proposal document
- Pour schedule and milestone dates
- Bid package logged to job file

KEY METRICS

- Estimate turnaround hours
- Bid win rate
- Estimated versus actual job cost
- Takeoff quantity variance

IMPLEMENTATION CHECKS

- Lock unit price update permissions
- Route complex bids to senior estimator
- Retain plan revisions with version stamps
- Audit trail on markup overrides
- Restrict proposal send to approvers

NEXT STEP

Turn this blueprint into an implementation plan.

Map each stage to your own systems, permissions, and approval routing before selecting tools or building automation.

packfoundry.app/assessment

CONCRETE CONTRACTORS WORKFLOW PACKS AND A FREE ASSESSMENT