ILLUSTRATIVE SAMPLE. FICTIONAL CONTRACTOR. NOT A REAL CLIENT.

PRECONSTRUCTION FOCUSED REVIEW

Sample deliverable

Prepared for a fictional mid-size general contractor, "Harbor Ridge Builders," reviewing one question: *Why do healthcare pursuits feel risky after the go decision?*

REVIEW QUESTION	MATERIALS REVIEWED (FICTIONAL)
How well do we understand what a pursuit decision rests on, and what changes at handoff?	Three past pursuit files, an estimating checklist, one handoff meeting agenda.

1. Intelligence node map

PURSUIT	ESTIMATE	HANDOFF	FEEDBACK
Go / no-go decision	Scope and cost basis	Estimate to project team	Actuals back to estimating

Information moves forward through these four nodes. In this fictional case it rarely moves back.

ILLUSTRATIVE SAMPLE. FICTIONAL DATA.

2. Known, inferred and unknown

PURSUIT HISTORY	Prior healthcare bids are filed by project. No summary of why pursuits were won or lost. INFERRED
COST HISTORY	Final job cost exists in accounting. Whether estimators use it on the next bid is not documented. UNKNOWN
HANDOFF	A kickoff meeting happens on every award. Its agenda is written and consistent. KNOWN
ASSUMPTIONS	Estimate assumptions are in the estimator's notes. Project managers say they do not see them. INFERRED
CAPACITY	No record of how many pursuits are active per estimator at one time. UNKNOWN

3. Top three improvement opportunities

A. CARRY ASSUMPTIONS ACROSS THE HANDOFF

Attach the estimate's top assumptions to the kickoff agenda so the project team starts from them.

B. MAKE COST HISTORY REACHABLE AT BID TIME

Identify which closed-job figures an estimator would need, and where they could be found in under a day.

C. RECORD PURSUIT LOAD

Start a simple count of active pursuits per estimator before judging capacity.

WHY THE HANDOFF ISSUE MATTERS

When the estimate's assumptions stay with the estimator, the project team plans, buys and schedules against a different picture of the work than the one that was priced. Differences then surface during execution as change conversations and rework, when they are hardest to resolve.

No savings, margin or schedule outcomes are estimated in this review.

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FIRST 30-DAY ACTION

Recommended first action

Add a one-page "assumptions we are carrying" sheet to the next award kickoff, written by the estimator and reviewed by the project manager.

SUGGESTED OWNER	EVIDENCE OF PROGRESS
Chief estimator, with the project executive for the first project.	The sheet exists for the next award and the project manager has read it before kickoff.

Readout call

A 30-minute call walks through the register, tests the three opportunities with the team, and confirms the first action and its owner.

What a real review includes

- Your own materials, reviewed under your direction
- A scope and timing confirmed in writing before payment
- Introductory price: $495

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