



How to Optimize Your Estimating Workflow as a Small MEP Contractor

Top 5 estimating tasks made easier through estimating software



As the owner of a small contracting company, you're used to doing things a certain way. And why not? If it isn't broke, don't fix it.

But, as it turns out, there are several elements of the estimating workflow that could greatly benefit from optimization. Pervasive, costly inefficiencies in the way projects are estimated are inhibiting most small construction companies from reaching their full potential. These issues are holding you back—you just might not realize it yet. Chances are that your team could improve estimating tasks by integrating web-based estimating software. As a small construction company, you need to jump at any opportunity to gain a competitive advantage, so here are a few ways estimating software can help overcome the workflow inefficiencies you don't realize are holding you back.

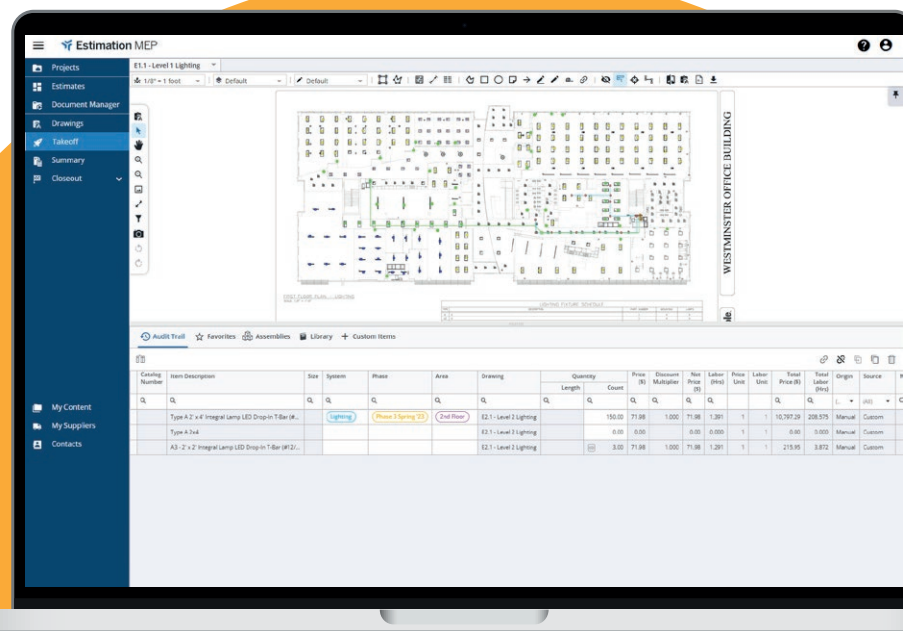


01

Generate an
Accurate Bill
of Materials



For many small construction companies, material costs and quantities are sometimes a shot in the dark.



It is often a guesstimate that is generated off the top of the head of the most experienced member of the team. While the classic method of ballparking material costs and quantities can yield a pretty accurate figure, the recent price volatility and supply chain disruptions make this approach extremely risky and can greatly impact the profitability and timeline of a given project. When it comes to material quantities, even a small margin of error can lead to

unforeseen expenses and delays. After being awarded a project, many estimators don't know the exact material quantities to order, which could lead to last-minute reorders that may affect the project timeline. That initial guess delivered during the estimating phase may be inaccurate, and rework is now required to obtain material quantities to start the project. All of this could have been done during the initial estimate, and

that's why many companies leverage estimating software to improve the accuracy of their material orders. Estimating software which leverages an up-to-date catalog of materials and material costs eliminates the need for guesswork. By taking this extra step at the outset of a project, you will save your team immeasurable time, money, and headaches when it comes time to get quotes and order materials from your vendors.



02

Address Client Disputes



There may come a time when you need to support an estimate you delivered with concrete facts. Maybe a client is disputing expenses, or maybe it has even escalated into a legal conversation. Whatever the reason may be, you need to hold your ground.

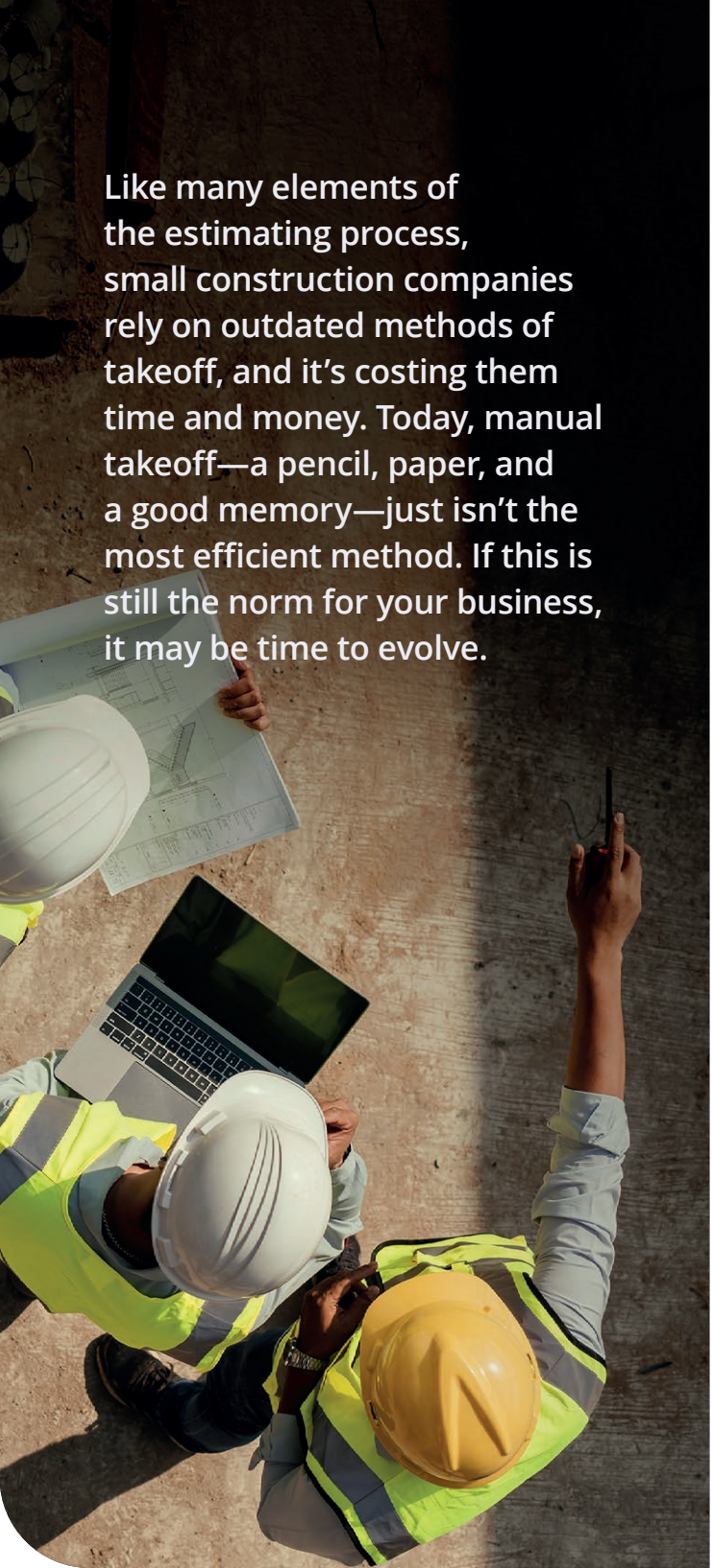
This common issue underscores the value of utilizing labor industry standards. When your team (inevitably) encounters a dispute over an estimate, you can fall back on an established, agreeable norm that is recognized by construction professionals at large. For example, many MEP contractors rely on labor units developed by their industry associations—the National Electrical Contractors Association (NECA) or the Mechanical Contractors Association of America (MCAA) which cater to the specific needs of electrical and mechanical contractors. When a client comes to you concerned about costs, you can rely on the support of industry standard labor as explanation. Industry standards can even act as defensible proof in the case of legal action.

When using estimating software, all calculations are based off of industry standard labor units. Whether you tap into NECA or MCAA-validated figures, or the labor standard developed from the software, the aid of agreed-upon facts and figures can not only ensure accuracy but also better support estimates in the case of a dispute.



03

Renew Manual Methods of Takeoff



Like many elements of the estimating process, small construction companies rely on outdated methods of takeoff, and it's costing them time and money. Today, manual takeoff—a pencil, paper, and a good memory—just isn't the most efficient method. If this is still the norm for your business, it may be time to evolve.

Web-based digital takeoff offers the following benefits:

Improved, cloud-based collaboration:

All stakeholders can access estimates online within web-based estimating software, which makes collaboration far more streamlined. No more need to meet in person to go over plans with a pencil and ruler. All collaboration can take place in a shared, online workspace.

Accessible online:

Digital takeoff hosted in the cloud securely stores all documents within a central, online platform. This way all stakeholders can access takeoff no matter where they are. Whether you're in the field or in the office, web-based estimating software offers a central repository for all estimating information that can be easily accessed online.

Takeoff doesn't have to be such a headache. Aided by all of the benefits that come along with digital takeoff—finally bringing it into the 21st century and going paperless—you can maximize efficiency and accuracy at this stage.

Paperless:

Save on printing and storage costs by moving all takeoff documents to a digital platform. No more printed plans, which means reduced printing or storage costs. All takeoff information is conveniently stored within an accessible, digital repository.

Accuracy:

Automated graphical takeoff speeds up the estimating process, allowing you to compare drawings side-by-side and seamlessly connecting to the audit trail in real-time to ensure that your estimate is always up to date for more accurate bids.



04

Leverage Past Successes





For many small construction companies, past successes exist solely in the memory of the owner.

The key to success for these libraries is that they're easily accessible and regularly reviewed and updated.

But, without any concrete record of repeatable processes, these successes will remain just fond memories with little-to-no actionable substance.

The most successful construction companies record past wins, unpack what worked, and leverage that insight for future projects. By tracking bid success history, you can better align your business with the projects that have proven successful and develop a repeatable strategy. You can dip into this data to better inform bid/no-bid decisions by determining which projects are worth your effort.

After integrating estimating software, all historical success will be documented in one convenient place. You have a record of all of your bids in one place, including what has worked in the past. Backed by this historical data, your team can track projects and better understand where you're successful and where you're not.





05

Accurately Forecast Job Expenses

As an estimating professional, you are well aware how a miscalculation can affect profit margins.

Before undertaking a project, you painstakingly account for any direct costs—such as materials or installation—to ensure all expenses are established and disclosed.

But are you adequately accounting for overhead?

Office coordination, insurance, transportation—these factors have just as much affect on project cost, but are rarely given the same attention. As an estimator you're accustomed to determining direct job costs so you can provide an accurate, profitable bid, but so often the overhead minutiae are overlooked. Small construction companies usually use a percentage to calculate overhead, but this guesstimate lacks the specificity needed to accurately calculate any overhead expenses that can affect a bid. And, when you simply ballpark overhead, you put your profit margin at risk.

Use estimating software to refine project expenses and improve the accuracy of bids. By leveraging accurate expense data within estimating software, your team can finally account for the little things that are costing you big business.



In Conclusion

There's only one estimating software that addresses all of the above for small-to-mid-sized MEP contractors: Estimation MEP powered by Trimble.

Estimation MEP is a web-based estimating software designed with smaller MEP contractors and projects in mind, which closely replicates traditional takeoff sheets. Backed by a Trimble® managed library of over 1 million components, from various manufacturers, Estimation MEP offers a robust catalog of items (many of which include pricing from Trade Service) for efficient and accurate online estimating.

Estimating tasks no longer have to fall solely on the shoulders of the most experienced members of the team. The software features an intuitive user interface so anyone on the team can work in the software.

Simple estimating tasks that would normally require first-hand expertise—setting up the job, uploading drawings, etc.—can be delegated to less-technical team members. This not only helps better distribute the estimating workload, but also adds an essential collaborative element to the process.

Estimation MEP visualizes construction plans and leverages industry recognized metrics to help improve the efficiency and accuracy of estimating tasks. Easy to use, accurate, and best of all, scalable—Estimation MEP makes it easy for any MEP contractor to adopt professional estimating software and reach their full potential.

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