REMODEL ATLAS

The Homeowner

Remodeling Playbook

Plan the project. Know the budget.

A practical workbook for defining your scope, comparing contractor quotes, tracking decisions, and keeping a renovation organized from idea to final walkthrough.

FREE HOMEOWNER EDITION

START HERE

Your 30-minute project setup

Before shopping, calling contractors, or choosing finishes, get the project out of your head and onto one page.

The goal

Create a clear starting brief. You do not need perfect answers yet. You need enough clarity to compare options consistently.

1. What are you changing?

Project type Project type Project type

Kitchen□ Bathroom□ Flooring□

Painting□ Roofing□ Windows□

HVAC□ Insulation□ Siding□

Deck / patio□ Landscaping□ Solar / energy□

2. Why now?

_____

3. Must-haves

_____

_____

4. Nice-to-haves

_____

_____

BUDGET PLANNING

Build a budget before you build anything

Use this worksheet to separate the project into buckets. Fill in contractor quotes later, but decide your ceiling now.

Budget bucket Your allowance / quote Notes

Demolition / removal $_____

Labor $_____

Materials / fixtures $_____

Permits / inspections $_____

Design / engineering $_____

Delivery / disposal $_____

Temporary living / storage $_____

Contingency reserve $_____

TOTAL PLANNING BUDGET $_____

Important

A planning budget is not a contractor quote. Local labor, site conditions, permit requirements, product selections, and changes in scope can materially affect final cost.

Your hard ceiling

$ _____

What will you cut first if the project exceeds that ceiling?

_____

SCOPE CONTROL

Write the scope before you compare prices

Two quotes are only comparable when they are pricing the same job. Use this page as your “same scope” checklist.

Scope item Included? Who supplies it? Notes / spec

Demolition / haul-away □ _____

Framing / structural work □ _____

Electrical □ _____

Plumbing □ _____

HVAC / ventilation □ _____

Drywall / patching □ _____

Flooring □ _____

Cabinetry / millwork □ _____

Countertops □ _____

Fixtures / appliances □ _____

Painting / finish work □ _____

Cleanup / final disposal □ _____

Anything specifically excluded?

_____

_____

_____

CONTRACTOR HIRING

Compare contractor quotes side by side

Price matters, but the lowest number can hide exclusions, allowances, vague specifications, or a different timeline.

Compare Contractor A Contractor B Contractor C

Total quoted price $_____ $_____ $_____

Scope matches brief? Yes No☐ ☐ Yes No☐ ☐ Yes No☐ ☐

Start date _____ _____ _____

Estimated duration _____ _____ _____

Permit responsibility _____ _____ _____

Materials / allowances clear? Yes No☐ ☐ Yes No☐ ☐ Yes No☐ ☐

Exclusions clear? Yes No☐ ☐ Yes No☐ ☐ Yes No☐ ☐

Change-order process clear? Yes No☐ ☐ Yes No☐ ☐ Yes No☐ ☐

Payment schedule clear? Yes No☐ ☐ Yes No☐ ☐ Yes No☐ ☐

Insurance / credentials checked? Yes No☐ ☐ Yes No☐ ☐ Yes No☐ ☐

Warranty / punch-list terms clear? Yes No☐ ☐ Yes No☐ ☐ Yes No☐ ☐

Ask the same questions

Send every bidder the same scope, drawings, photos, and product assumptions. That makes the comparison much more useful.

BEFORE WORK STARTS

Pre-construction checklist

A calmer renovation usually starts with fewer unanswered questions.

- ☐ Final written scope is attached to the contract.
- ☐ Product selections and model numbers are documented.
- ☐ Allowances are clearly identified.
- ☐ Start date, working hours, and expected duration are understood.
- ☐ Payment schedule is written down.
- ☐ Who handles permits and inspections is clear.
- ☐ Change orders must be approved in writing before extra work begins.
- ☐ Access, parking, keys, alarm codes, and lockbox rules are agreed.
- ☐ Dust protection and daily cleanup expectations are discussed.
- ☐ Pets, children, and restricted areas are planned for.
- ☐ Utility shutoffs and interruption windows are discussed.
- ☐ Where deliveries and removed materials will go is agreed.
- ☐ Neighbor / HOA requirements have been checked where applicable.
- ☐ You have a folder for contracts, receipts, photos, warranties, and change orders.

Project communication rule

Primary contact: _____ Preferred channel: _____ Update frequency: _____

PROJECT CONTROL

Simple renovation timeline

Track milestones instead of trying to remember every conversation.

Milestone Target date Actual date Status / notes

Contract signed _____ _____

Permits / approvals _____ _____

Materials ordered _____ _____

Site preparation _____ _____

Demolition _____ _____

Rough-in work _____ _____

Inspections _____ _____

Walls / surfaces _____ _____

Install finishes / fixtures _____ _____

Painting / touch-ups _____ _____

Final walkthrough _____ _____

Punch list complete _____ _____

Watch dependencies

A late material delivery can delay several later tasks. When one milestone moves, update the dates that depend on it instead of treating each delay in isolation.

KEEP DECISIONS VISIBLE

Decision + change-order log

Small changes become expensive when nobody remembers what was agreed. Keep one running record.

Date Decision / change Cost impact Schedule impact Approved?

____ _____ $_____ _____ ☐
____ _____ $_____ _____ ☐
____ _____ $_____ _____ ☐
____ _____ $_____ _____ ☐
____ _____ $_____ _____ ☐
____ _____ $_____ _____ ☐
____ _____ $_____ _____ ☐
____ _____ $_____ _____ ☐

Decision rule

☐ Scope change is written down.

☐ Price impact is known.

☐ Schedule impact is known.

☐ Both sides approve before work proceeds.

FINISH STRONG

Final walkthrough + punch list

Walk the space slowly. Test what can be tested. Photograph anything that still needs attention.

- ☐ Work matches the agreed scope and selections.
- ☐ Doors, drawers, windows, hardware, and moving parts operate correctly.
- ☐ Visible surfaces are complete and free of obvious damage.
- ☐ Fixtures and appliances included in the project are operating.
- ☐ Outlets, switches, lighting, fans, and controls included in the work are checked.
- ☐ Plumbing fixtures included in the work are checked for operation and visible leaks.
- ☐ Paint, caulk, grout, trim, and transitions are visually reviewed.
- ☐ Debris, labels, and protective materials are removed as agreed.
- ☐ Manuals, warranty information, spare materials, and keys are handed over.
- ☐ Open punch-list items have an owner and target completion date.
- ☐ Final payment conditions in the contract are reviewed before release.

Punch-list notes

_____

_____

_____

_____

_____

KEEP THIS WITH YOUR PROJECT

A good remodel is a chain of clear decisions

The purpose of this playbook is simple: make the project easier to define, easier to

price, and easier to manage.

Your next three actions

1. Finish the one-page project brief.

2. Set a planning budget and hard ceiling.

3. Compare quotes against the same written scope.

Use Remodel Atlas for:

- Project cost calculators
- Remodeling planning guides
- Contractor quote comparison tools
- Project-specific checklists
- Regional cost research as it is published

PLAN SMARTER WITH REMODEL ATLAS

remodelatlas.online

Plan the project. Know the budget.

Planning resource only. This playbook does not replace local building-code, permit, legal, financial, engineering, or professional contracting

advice. Requirements vary by location and project.