



HOMEOWNER / PRINTABLE FIELD GUIDE

Project Planning and Final Walkthrough

A simple plan to reduce surprises before, during and after a home project.

Before work

List the must-haves, optional upgrades, budget ceiling and access limitations.

Photograph existing conditions. Identify pets, parking, work hours, utilities and areas to protect.

For older housing, ask whether work will disturb painted surfaces and whether federal or local lead-safe requirements apply.

For comfort or energy projects, consider a whole-home assessment before selecting isolated improvements.

During work

Set a check-in rhythm and a single decision-maker. Put scope, price and timeline changes in writing before extra work proceeds.

Keep dated photos and a brief decision log. Check progress at agreed milestones rather than waiting until the last day.

Walkthrough

- ☐ Confirm the agreed scope, finishes, fixtures and cleanup
- ☐ Test doors, windows, outlets or equipment affected by the work where safe
- ☐ List unfinished or damaged items with photos and target resolution dates
- ☐ Collect warranty and care instructions, permit closeout records and final receipts

Project notes

Top three outcomes that matter most

Open items and responsible person at final walkthrough



One-page decision log

Keep a dated row for each change: what was found, proposed solution, cost difference, schedule difference and who approved it. Confirm in writing before extra work starts.

Need a starting point for your next project? Visit saferpros.com and describe the work. • Call 1-800-HIRE-A-PRO (1-800-447-3277).

Sources and further reading

FTC: How to Avoid a Home Improvement Scam - <https://consumer.ftc.gov/articles/how-avoid-home-improvement-scam>

EPA: Lead Renovation, Repair and Painting Program - <https://www.epa.gov/lead/lead-renovation-repair-and-painting-program>

DOE: Professional Home Energy Assessments - <https://www.energy.gov/energysaver/professional-home-energy-assessments>

Educational guidance for U.S. readers. Requirements, permits, licenses, consumer rights and payment rules vary by location and project. Check current local rules and your written agreement. Safer Pros is a referral and project-support platform; participating providers are independent businesses.

Additional notes and next actions
