



A 10-STEP GUIDE TO AN

AWESOME

**KITCHEN & BATHROOM
REMODEL**





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Introduction - Why Read This Book?

Let's face it: residential remodeling has risen from the ashes of the the Great Recession and is moving across the USA at full-force. Many articles, like [this one](#) and [this one](#), tell us home renovations are on the rise and will be for years to come. This is a great sign that our economy is recovering, and we've noticed this trend as well at [kitchenCRATE](#) and [bathCRATE](#).

In response to this phenomenon, we created this e-book for you! In it we'll cover the remodeling process from start-to-finish, culling information from our 12+ years of construction experience, our favorite blogs and websites, and even some internal documents we use with our clients.

A Road Map for Your Project

We often meet with clients considering a remodel, but they tell us they have "no idea where to start." We use the same steps in this blog series to guide them through their remodel project; we assure you these steps are "real-world" proven.

But wait, you may be asking: Since this information is coming from a contractor won't it be skewed in favor of using said contractor's company?

Actually, it won't be.

Here's why: as much as we love serving clients we also understand kitchenCRATE and bathCRATE are not the right fit for everyone. Some homeowners want to do the work themselves. Some want to use a contractor they already know. And some are looking for a contractor with a "different" standard of quality (and thus a lower price structure).

So let's dive right in and start the path to your amazing kitchen or bathroom remodel!



Defining Your Remodel: From Idea to Paper

Our Dirty Little Secret

People don't believe us when we tell them this, but here's a little contractor secret.

You ready?

Here goes: The hardest part of any construction projects happens BEFORE work even starts.

That's right. All the little parts and pieces that have to be attended to before work begins are by far the most time consuming, stressful and important facets of an amazing remodel. (We're assuming, of course, that you don't just jump right into your remodel without thought; this would of course minimize the "planning" stage but surely ruin the "execution" stage.)

How can this be, you ask?

Well, the main challenge is getting your idea from your head into your contractor's head. Since we lack [Betazoid](#) ability to transmute thoughts to each other, there has to be a process in place to be sure your builder knows what you want. If not, you'll encounter issue after issue during and after construction.

The key elements of defining your project are beginning with the end in mind, harnessing the power of visual inspiration and translating your idea to "contractor-speak." Let's look a bit deeper at these three elements:

Begin with the End in Mind (Let's get Zen)

OK, do this: Pull out a blank piece of paper, a nice, clean, white piece of paper. And grab a pencil (not a pen).

Sit down at a desk or table, and remove yourself from the chaos of your day for just a minute. Place the paper in front of you. Grab the pencil. Close your eyes (well, not while you're reading this, of course, but you get the idea.)

Now, finish these 5 sentences, one by one:

- When I walk into my newly remodeled space, I want to see...
- When people see my new remodel, I want them to think...
- The three things I most want to see changed about my space are...

- If I had to choose between high-quality and low-cost, I would choose...
- My budget for my remodel is around...

Done? Good. You are now officially further on your remodel than many people ever get. You've visualized your remodel, you've identified what you want others to think, you've identified your major "pain points" that are causing the remodel, and you've declared a distinct financial direction for the project.

Good job! Now go have a glass of wine to celebrate. Or go to the next item...

Harnessing the Power of Visual Inspiration

Now, some fun stuff.

We live in an age of unprecedented visual stimulation. We have endless access to the wonderful things other people have created, and we have splendid little tools with which to organize them.

So now it's time for you to go on a picture-hunting expedition. You can use whatever form of medium you like: Internet, e-books, print books, the homes of friends and family, etc. All are perfectly acceptable options.

No matter which medium you choose, start gathering images and saving them on your computer, on an online database, or printing them and copying them and place them in a file folder. Your goal in this step is to gather images and ideas; inspiration if you will.

Here's what that might look like if you're a bit more technically inclined:

Let's say you need a kitchen remodel. When completing our little Zen exercise above, you landed on quartz countertops, antique-white cabinets, glass tile backsplash, stainless steel appliances, etc.

OK, perfect. Now go over to a great image site for homes like houzz.com, hgtv.com, or thisoldhouse.com. Search for kitchens and take a look around. Every time you get that "I love it!" feeling about a picture, capture it by saving it on your computer. Even better, take a few minutes to sign up for pinterest.com and "pin" each image to a "pinboard" you create just for this remodel. [Here's an example](#) from one of our team members.

Do this for a few minutes each day and in no time you'll have a great library of inspiration for your project.

Translating Your Idea to Contractor-Speak

Alright, so you are making some great progress, and all in one short afternoon. You've established guiding principles for your remodel, you've collected a lot of inspiration, and now it's time to translate into "contractor-speak."

But to do that, you need to know how contractors think. Bear in mind, most contractors (the good ones at least) are highly analytical. They're not the

"touchy-feely-let's-sit-down-and-have-a-deep-conversation-types." They succeed or fail based on fact, reduction of risk and financial responsibility. Of course, a good contractor wants you to have exactly what you want. But they also want enough clarity to accurately implement your job and satisfy you.

So you have two choices at your fingertips to translate the job from your head to "contractor-speak:"

- Hire an interior designer, architect or draftsman to produce this translation or
- Write a scope of work for your contractor.

Each method has its strengths and weaknesses. The former will require you to pay for services (unless you use kitchenCRATE or bathCRATE and their built-in design services) but will get you a set of plans everyone can work off of. The latter just costs you time, but it does require a working knowledge of materials and methods. We'll talk more about designers in Step 4, so for now, let's look at the self-performing method.

A scope of work is simply a bullet-point list of what you want. [Here's an example](#). It can be arranged by room, or by area of room (floor, walls, ceilings) or by trade (flooring, plumbing, electrical, tile, cabinets, etc.) Either way, it's a thorough listing of what you want (or what you think you might want.)

To help in creating such a scope, [here is a list](#) of standard elements of a residential remodel. Just take it one step at a time, filling it in as you go. Before you know it you'll have a completed scope of work!



Go/No-Go: Deciding if You Are Ready for a Remodel

Are You Ready to Remodel?

Now that you've completed Step 1 you have some good momentum going.

If you followed our simple instructions, you now have a firm grasp of your project goals, you've committed your most sacred project requirements to paper, you've collected great inspiration for your project, and you've translated your project to contractor-speak.

So what's next, you ask?

Well, deciding if you want to actually do the project is a good place to go from here.

In this 2nd step we'll deal with two critical elements in deciding if you want to proceed with your project: money and time.

Concept Budgeting

Concept budgeting is simply a rough estimate of your project budget based upon your known scope of work to date. Is that too technical? Try this: A concept budget is an educated guess of project costs.

There are a few ways you can get a concept budget for your project:

Soliciting Concept Budgets from Contractors

Hands down, this method gets you the most accurate budget possible. It also requires early discussions with a general contractor.

For example, at kitchenCRATE and bathCRATE we offer free phone consultations to all potential customers. During this call the CRATE team assess the scope of work and then offers a concept budget for the project. All of this takes less than 20-minutes. ([Click here if you'd like to try it out.](#))

To some, this is too early in the process to actually work with a builder.

Most reputable contractors will work with you at this stage at no charge, hoping to impress you with their thoroughness and communication skills, thus gaining your trust for the construction phase of the project.

Other contractors would rather just wait until you're sure of the project and have complete plans and specifications for bidding. To each their own. Your best bet, should you use this method, is to openly and honestly tell your contractor where you are in the process, and let them decide if they have the time and resources to help.

Note of Extreme Importance: Do NOT under any circumstance get multiple "bids" in this phase of the project. It's a waste of your time and certainly your contractor's time. There is no accurate way for contractors to "bid" a project at this phase, and you'll be making your decision based upon inaccurate and incomparable information. At kitchenCRATE and bathCRATE we respectfully decline any such requests to "bid" a project at this stage.

Building Your Own Spreadsheet

Perhaps you have some remodel experience and some Excel knowledge, and you want to assemble a project budget yourself. Good for you! Nothing wrong with that. Here's an approach you may consider:

1. [Download this simple budget worksheet.](#)
2. Using the scope of work you created in Step 1, input your best guess of costs for each project element. If an element is not applicable to your project, simply leave it blank.
3. If you encounter a row in the budget that you are unsure of, simply call a local vendor in that trade, and chat with them about potential costs. They'll usually give you a ballpark figure right over the phone.
4. You're done! The number at the bottom of the spreadsheet will be a great approximation of your project cost.

Using Online Calculators

The Internet is full of various online cost calculators. Some are better than others.

The main drawback with online calculators is they use general, lump-sum calculations instead of the more accurate line-by-line method used in the steps above. Nevertheless, they are often a good starting point. Here are a few links:

- [HomeAdvisor](#)
- [DIY Online](#)
- [Craftsmen Network](#)
-

Now that you're armed with a concept budget for your project, consider the specific timing of your potential remodel...

Timing Factors to Consider with Your Remodel

Project Duration

Consider how long your project might take. Project duration ranges from 7 days for a kitchenCRATE or bathCRATE Classic to a few months for a major down-to-the-studs renovation. If there are structural modifications involved, add even more time to the equation.

To minimize project duration, be sure to do the following before starting work:

- Secure building permits if required.
- Select your finishes.
- Inquire on material "lead-time" for your selections. "Lead-time" means how long the product has to be ordered before it arrives on-site.
- Sign contracts with your contractors. Reviewing contracts can take a while and doing this before work starts not only protects you, it allows you to edit the contract to meet your needs without the pressure of construction being under way.

Major life events

Now that you have an approximate project duration, go through your calendar and see what major life events may interfere. Do you have a major family event on the horizon, especially one you must host? Are there any imminent marriages, births, or the like?

If so, be sure you honestly assess each of these events and how they may cause you added stress. Remodeling can be stressful without other contributing factors.

Holidays

Remodeling around holidays, especially between Thanksgiving and New Year's Day, can be very challenging for a homeowner. Once again, honestly assess your responsibilities during these times and make sure they mesh with your remodel.

You can always elect to take a break from remodeling during these times, but in our experience, a project sitting without being worked upon is as stressful as work taking place.

Conversely, many contractors slow in the winter months, so intentionally scheduling your project for this time may lead to some cost savings from your contractor.

Seasons

If your remodel involves roofing, windows or exterior work in general, be sure to think through the approaching seasons. Any good contractor can handle weather issues that arise in wet months, but weather will delay the project, and could add to the stress of the remodel. Not to mention, an unusually wet winter could cause significant project delays.

Even if your project is entirely indoors, rain and snow will cause more dirt and mud to be tracked into your home than during dry months. Be sure to address this issue with your contractor up front, and establish expectations for flooring protection, access to the home, and clean-up standards.

Conclusion

You've now thoroughly thought through both the money and time aspects of your project. It's time to make a decision: do you want to proceed, or not.

If not, table your project for a while. Perhaps circumstances will change and you'll be ready in a few months to proceed.



To Permit or Not To Permit – Dealing with Building Codes and Departments

Now that you've defined your remodel and decided to move forward, the detailed planning can begin. Next up: permitting.

Why is permitting important? Your permitting strategy determines which design professionals you need to partner with and also significantly impacts your project schedule. Add "permitting" to the very long list of things many folks wait too long to address, costing time and money.

A Brief Overview

Permitting is basically getting your project certified, or approved, by your local building department. There are hundreds of different types of permits, and each and every jurisdiction (county, city, etc.) approaches permitting differently.

Since this e-book focuses on kitchen and bathroom remodels, you're really dealing with one type of permitting: building permits. (Note: planning permits are typically triggered by changes to exterior features like additions, expansions, fencing installation, change of use of the property, etc.)

Basic building permits require a permit application be submitted with either plans or a description of work. The building department then reviews the application, asks for clarifications as needed, and then issues the building permit. At this point, it's up to the homeowner (or contractor) to obtain inspections throughout the construction process. Your building official will advise which inspections are required. Upon job completion, a "final inspection" is conducted and, when passed, your project is complete in the eyes of the building department.

How Do I Know If I Need a Permit?

Here's a good rule-of-thumb: you need a permit if you need an inspection.

What kinds of activities typically require an inspection? Here's a general list:

- anything that affects the structure of the building
- plumbing
- electrical
- framing
- concrete
- masonry other than decorative veneer

- insulation
- roofing
- drywall
- pools or spas
- fencing over 6' (typically)
- closing off of exterior doors or windows

So What Do I Do If I Need a Permit?

Depending on the extent of your project, you might be able to get by with a description of work instead of a full set of plans. Check with your building department on this issue.

If plans are required, you'll need to hire an interior designer, architect and/or engineer. To find a local architect, check with your local branch of the AIA by using [this architect finder tool](#). The AIA is a long-established professional organization for architects and designers. It's a great starting point.

Once you find your designer, it's simply a matter of agreeing on a price and then moving forward with the design. This is money well-spent. Not only will you ensure your project meets proper code requirements, but architects bring a wealth of project experience, often quickly solving design challenges that stump homeowners for years.

(Note: kitchenCRATE and bathCRATE handle all design and permitting in-house, no need to hire outside consultants.)

Bypassing the Permitting Process

As you can tell by the information above, your project may not require a permit if it pertains solely to cosmetic, non-structural improvements. If that's the case, you've saved yourself quite a bit of effort and money. Good for you!

If you decide to forgo the permitting process despite knowing you need one, be ready for the following potential outcomes:

- Inability to sell your home due to non-compliant construction. This is often flagged by the appraiser during the transaction and many lenders will subsequently not lend.
- Risk of the improvements causing injury or death. If your non-permitted carport falls during a wild graduation party, you will be on the hook, and your insurance company may not offer much support. Quite a tragedy on many levels.

The cost and time saved by not permitting your project is rarely worth the risk.



Designing and Specifying - The Importance of the Details

Now that you've defined your remodel, decided to move forward and dealt with any permitting issues we can now move on to designing and specifying your project.

Designing or specifying your project can take one of two distinct routes: creating a detailed scope document or generating a set of plans.

The Scope Document Method

In Step 1, we discussed specifying your project using a scope of work document. For small projects or for homeowners with extensive remodeling experience, this could be all that's needed.

If that's the case, go back to your scope document (hopefully it's on your computer and neatly filed away ready for edits!) and review it for accuracy. If you haven't done so already, take a few little field trips to local stores and suppliers and really start getting into the details. For example, instead of identifying "wood baseboard" for a room, specify "3-1/2" MDF Colonial Baseboard, Painted."

Evaluate your project piece-by-piece, and be sure to define it well. This allows you to solicit more accurate pricing from contractors and also eliminates costly delays during construction.

Believe me, the pressure of making a major color or finish decision during the remodel isn't fun for you, your contractor, or especially your significant other!

The "Full Set of Plans" Method

If you need to take your design and specifying a step further, then you definitely want to have professional generated plans for your project.

As mentioned in Step 3, there are lots of ways to find an architect, but the AIA is the best. Check out their "[Find and Architect](#)" online tool!

Also consider the services of a qualified interior designer, like those that work directly with kitchenCRATE and bathCRATE on each project. Many have the tools available to generate plans, schematics and 3D renderings of your project. Others are just glorified furniture and wall-paper purchasers. Be sure to look at past documents he or she has generated to get a feel for the deliverable.

In general, a full set of plans includes:

- Demolition plan
- Floor plan

- Reflected Ceiling Plan (basically a drawing of what you would see if you laid on your floor and looked up)
- Interior elevations
- Plumbing Plan
- Electrical Plan
- Mechanical Plan

Depending on the size of the job, these plans may be combined onto one sheet or even onto one drawing. For example, a small living room remodel plan might have the demolition, floor, and electrical plan all on one drawing since there's not too much to specify.

Not only will a full set of plans clarify your project in your mind and help you obtain a building permit, it will also allow you to get accurate and comprehensive bids from contractors and subcontractors. Which just happens to be our next step!



Choosing a Contractor - Finding a Perfect Match for Your Project

Great, we've now specified your project with a scope document or plans, so it's time to focus on selecting your contractor.

An Important Decision

Much like choosing a spouse, business partner or friends, choosing your contractor can be a fantastically important decision. (OK, maybe not as much as some of those, but you get the point!)

A good contractor will be your advocate, inspire trust, produce great results and make your remodel experience anywhere from tolerable (if you just hate change) to fantastic (if you have fun with these types of things).

A bad contractor will cause sleepless nights, contentious exchanges, hours sitting by the front window waiting for SOMEONE (ANYONE!) to arrive, and at its worst, lawsuits, lost money, and unfinished projects.

There are two distinct ways to choose a contractor, and it's a huge mistake to confuse the two. You can't have it both ways. Either you negotiate with one contractor you feel comfortable with, or you "hard bid" your project to multiple contractors and make your decision mostly based upon price. Either way can work well, but once again, you can't do both. Let's tackle the more common method first.

Choosing Your Contractor through Bidding

"Bidding" your project is the most common way of choosing a contractor, especially for large-scale, multi-month projects. But, like any value proposition you must be careful because you get what you pay for. Back when our corporately-owned franchise location used to do large-scale custom remodeling work (they now focus exclusively on kitchenCRATE and bathCRATE), one of their project categories was the "Post-Low-Bid-Contractor-Repair-Job." These were jobs for clients who started out with the low bidder (sometimes REALLY low), commenced work and then had their contractor 1) never show up 2) take a deposit and run or 3) "complete" the job in a terrible, frighteningly bad fashion.

But there is a right way to bid your job out, and here it is:

1. Ensure your scope of work documents are in place. See Step 4 for the details, using either a scope document for simple, smaller jobs or plans for larger, more detailed jobs.

2. Find three good contractors willing to bid. Bear in mind, most of the best residential contractors will respectfully decline bid invitations, depending on work flow. They know they'll never be the "low bidder" because of supply and demand: their services are in demand and therefore their prices are higher. However, plenty of residential contractors are eager to bid. Use web searches, Angies' list, social media sites or word of mouth to come up with a list, and then...
3. ...check references! Yes, that's right: ask for three references. And not just three references, but the names and phone numbers for the last three clients they worked with, including project dates. Why? Otherwise, you'll get their three favorite clients, not objective clients who recently experienced this contractor's services. Many contractors performed well in the past, but you're interested in current performance. Also, by getting project dates you validate the recency of the job and also find out if the contractor has been slow for a while (if they have been, investigate why).
4. Now you're armed with your list of three qualified contractors and it's time to host a job walk. We recommend having the contractors walk the job at the same time. This allows everyone to hear answers to questions posed by others, and creates a sense of competition among the bidders. Make sure you have copies of your scope documents available for the contractors.
5. After walking the job, set a firm bid date for the project. We recommend 2 weeks as the ideal time frame for most jobs. This allows the contractors time to assemble the budget, solicit pricing from subcontractors and suppliers, etc. Also, a firm date creates their first "deadline." Buyer beware: if your contractor is late in getting you a bid, don't expect them to be timely in starting (or finishing) your project.
6. Once the bids are in, it's time to evaluate the proposals. Be sure to request the bids be broken out by trade, or sections of the project (framing, plumbing, electrical, drywall, etc.) This helps you analyze each contractor's assumptions. If a line item doesn't look right, simply ask for clarification. In our experience, if something "just doesn't look right," it probably isn't.
7. Now that the bids are evaluated, it's time to make your decision. By this time, you've met each contractor, interacted with them, reviewed their pricing and clarified their bid. You should have a good feeling of what direction to head. If not, if there is no clear winner, congratulations! Looks like you have more than one good option. So go ahead and make your choice.
8. So what's the first thing you ask for from your newly hired contractor? A schedule, of course. Ask for a complete project schedule showing a firm start date and timing for each item of the project. Once again, this is a chance for your contractor to meet a deadline. If they won't send you a schedule, or send one later than requested, consider it an ominous sign. ([Here's a sample of what a kitchenCRATE schedule looks like...](#))
9. Lastly, and MOST IMPORTANTLY, it's time to sign a contract. We highly recommend paying the \$22 and using an [AIA](#) contract. These contracts are the best in the business, and protect the homeowner to no end. You can buy single contracts at the AIA website [here](#). For a residential job, the A105 is perfect. We've used it for years. If your contractor insists on using their contract, be sure to review carefully. It's likely written with their interests in mind.

Choosing Your Contractor through Negotiation

This method of choosing your contractor follows a similar course as the one above, but offers a few key advantages and some disadvantages.

The key advantage is forging a trusting relationship with your contractor early. If you choose the right builder, this will be an enjoyable, productive experience, and much quicker than the bid process. A good contractor who knows he or she is "the chosen one" will treat your job with urgency and respect, knowing that you are placing much trust in them.

Negotiating a project still requires a scope document, reference checks (even more so!), a job walk, and a bidding phase, but the spirit will be one of collaboration and win-win, as opposed to adversarial and competitive. Once again, to each their own.

At kitchenCRATE and bathCRATE we don't hard bid projects. We only negotiate. The main concern we hear from homeowners is "how do I know I'm getting a good deal?" And it's a great question.

We solve this through an open-book estimating process. The way we see it, this method gets the homeowner a great deal and establishes a great working relationship from the onset. Pretty nice indeed.



When to Start - Timing Your Remodel to Fit Your Life

You're really on your way now! Your contractor is on board so now it's time to schedule your project.

When you start your remodel depends on two timing factors: timing based on your life circumstances and timing based on seasons (weather). Here we go!

Accommodating Life Circumstances

The first timing factor is easy to understand: after all, who would start remodeling their home when they have an important upcoming event or are about to host a major holiday?

Um, well, a lot of people, actually.

That's right: in our experience mild amnesia occurs as homeowners are about to embark on a remodel. Sometimes they are so engrossed in the process that they forget that their first grandchild is due in 5 weeks, or they fail to recall that they're hosting a graduation party for 150 of their closest friends and family in about a month.

So, do this: take the project schedule your contractor provided in Step 5, and add 20% to it. (Example: If the schedule is 40 calendar days, use 48 calendar days for this exercise.) Then, sit down with your household and review each day of your personal schedules from the day your project starts until the end of this 120% timeline.

That's right. Each day. You'd be amazed at the things you remember when you all go through this together.

Accommodating the Weather

Like the previous factor, this too should be obvious for folks to assess. Alas, once again, we often encounter full exterior projects starting in late fall.

Here's a good rule of thumb: don't open up your roof, exterior walls, windows, etc. if there is a chance of rain in the near future. (As an aside, there are certain climates that are "never" dry, so make sure you have a contractor experienced with wet-weather work.)

To further assist, here is a list of items to avoid in wet weather:

- Exterior concrete
- Pool plastering

- Major dirt movement or landscaping
- Roof or wall framing
- Roofing
- Gutter replacement
- Window replacement
- Stucco work
- Exterior painting

Additionally, be sure your contractor protects the inside of your home if doing work during wet months. The constant tracking of water and mud through the house can cause a mess and even permanent damage.

A note on floor protection: Be leery of the material used when covering floors. Red rosin paper has been known, when wet, to "bleed" onto carpet or linoleum. Also, adhesive-backed carpet-covering (a thin plastic that sticks to carpet) can leave an adhesive residue that attracts dirt over time and can leave a stain. The best thing to use is a heavy painter's drop cloth. Its weight keeps it down without any tape and it can take a ton of abuse without allowing dirt or moisture onto your floor.



What to Expect - Advice for Enduring a Home Under Construction

Next up: Here's some advice for getting through the process while maintaining your sanity.

Expect the Inevitable "Problem"

The one thing you can be sure of during your remodel: there will be a problem.

Not necessarily a big problem, and certainly not an unsolvable problem, but there will be a problem. Material may arrive damaged. One of your selections might appear differently than you expected. Mold could be discovered once the walls are opened up. Any variety of challenges may be encountered.

So your best game plan is to expect problems during the job. That's the nature of construction. (And why the life expectancy of most contractors is roughly 42 years...)

Trust the Professionals...

Alas, when the problems pop up, be confident in your team. If you've followed the six previous steps in this series, you'll have a great contractor and design team, so let them help you through the process.

In fact, a main difference between an average contractor and a great contractor is the ability to navigate challenges.

Another element of trusting the pros is to show that you trust by not micro-managing. This is a fine line. The remodel, after all, is yours. And you're paying good money and expecting a high-quality product. So expecting excellence is not the issue. But micro-managing and expecting excellence are two different things.

...But Be Sure to Check on Them

It's highly recommended, however, that you check your project daily. This is easy if you're living in the home during construction. However, if you're remodeling a 2nd home, or have moved out during the remodel, be sure you check in daily to make sure things look as you expect. Catching an issue early often makes the repair or change simple and affordable for all parties.

A good idea regarding this issue is creating a project notepad. Simply purchase an inexpensive notepad or notebook before the job starts, and each night put your requests/reminders/concerns

down on the pad of paper. Instruct your contractor to check the notepad each morning before starting work and to call you if there are further questions. Not only does this create a seamless line of communication but it also establishes a written record of items if you ever need to go back and validate.

Remember, Nearly Everything is Fixable

If you encounter an issue, be sure to pause, take a deep breath, and remember nearly everything is fixable.

Now, if a work of art that's been in your family for 200 years gets damaged, of course that's not fixable. (And of course you would never leave such an item in a spot where it could get damaged). But nearly everything else can be fixed or altered if it's not as it should be. Remember this as you navigate problems, and it will do wonders for your stress level.

Make it Fun

Keep in mind: you're getting an amazing remodel! (After all, that's what this series is called.)

Focus on the finish line and have fun. Buy the crews lunch every once in a while to show your appreciation. I guarantee you'll get a better product and have happier workers, and it will only cost a few bucks.



Important Documents - How to Protect Yourself during Your Project

Time to get your paperwork in order. Let's take a look at the most important documents you can have in place during your project.

Contract Documents

What are they: Contract documents are a general term describing the documents upon which your contract is based. In many cases, the contract documents are a set of plans. In some cases, the contract documents are simply a scope of work. Either way, contract documents are the documents your contract references that define your project.

Why it's important: Without contract documents, the scope of work only exists in the mind of the client and the contractor. Not only are the two minds often of differing opinion, but if there is ever a need for a legal remedy, no contract documents means no leg to stand on.

How you get it: See Step 4 discussing the development of your contract documents, including two different ways to define your project.

When it should be in place: Before project starts.

Prime Contract

What is it: A prime contract is a legal agreement between a project owner and a general contractor. At minimum, it defines the project price, schedule, payment terms and ramifications if either party fails to uphold their end of the agreement. It also references the Contract Documents described above as an integral part of the contract.

Why it's important: It protects you, plain and simple. Without a contract, it's nearly impossible to seek legal remedy to an issue.

How you get it: Any general contractor worth their salt will have a standard agreement to use. Be sure you review in great detail, as it needs to protect you as well as the general contractor.

Alternatively, the [AIA](#) has a great set of legal documents that can be purchased for less than \$25 each. We recommend the AIA 105 for almost all residential projects if the general contractor does not have a standard contract you agree with. ([Here's where you can purchase legal documents from AIA.](#))

When it should be in place: Before project starts.

Project Schedule

What is it: A document that shows each element of your project, along with a start and end date for each. Professional schedules are usually in a [Gantt chart](#) format but can also be a simple bullet-point document. ([Here's a sample schedule.](#))

Why it's important: Without a detailed schedule it's nearly impossible to hold your contractor accountable until it's too late. It's much better to notice schedule slippage on an item-by-item basis than it is at the end of a job.

How you get it: Simple: ask your contractor to generate it. If he or she cannot produce it, or does not understand what you mean, start looking elsewhere. It's like a mechanic who struggles to find your hood-release button. ("Um, I think I'll take my car somewhere else...")

When it should be in place: Before project starts.

Insurance Certificate

What is it: A certificate produced by a contractor's insurance carrier proving insurance coverage. ([Here's a sample.](#))

Why it's important: Without this document it's difficult to ensure your contractor carries insurance. Also, when listed as "additionally insured" at the bottom-left of the certificate, an owner benefits from additional risk reduction should an on-the-job accident occur.

How you get it: Simply ask your general contractor to provide this document from their insurance agent. Not being able to provide this document is a major warning sign. (Enough to where you should probably not use this specific contractor.)

When it should be in place: Before project starts.

Contractor's License

What is it: A state issued license proving a contractor has the education, experience and (sometimes) insurance necessary to perform contracting activities.

Why it's important: An unlicensed contractor exposes the project owner to an array of liability. For example, an unlicensed contractor is not under the jurisdiction of the state licensing board, and therefore the licensing board can be little help during a dispute. A contractor that has not taken the time to acquire a license obviously does not place importance on following rules and regulations. This is a concern on any project because compliance ensures safety for occupants.

How you get it: Ask your contractor for a copy of his or her "pocket license," a credit-card sized license that shows class and expiration date. In addition, check your state licensing board website ([here's the CA version](#)) to cross-reference any information provided by your contractor.

When it should be in place: Before project starts.

Pre-lien

What is it: A document filed by sub-contractors on your job that notifies you, the property owner, that they are working on your job and reserve the right to lien your property if they are not paid by your general contractor.

Why it's important: Since the sub-contractors do not have a direct contract with you, the property owner, the law states they have to tell you they have future lien rights if they are not paid by your general contractor. Not every sub-contractor files a pre-lien, but many do, just in case. **THIS IS NOT A LIEN!** It is simply a notice of the potential for a lien if your contractor does not pay.

How you get it: The sub-contractor has to mail it to you within a certain number of days of starting work. The number of days varies by jurisdiction, but is usually around 20. When you get these, simply file them away for use at the end of the job. See the next section on Lien Release.

When it should be in place: You should have all of the pre-liens by the end of the job, for sub-contractors securing their pre-lien rights. If you don't get one from a sub-contractor, no action is required.

Lien Release

What is it: A lien release is an official document that releases you, the property owner, from lien responsibility. There are many different kinds of lien releases, but the most important is an Unconditional Upon Final Lien Release. ([Here's a sample of the California version.](#))

Why it's important: Once your general contractor and sub-contractors provide you this document, they waive their right to lien.

How you get it: Collect an Unconditional Upon Final Lien Release from each sub-contractor that has filed a pre-lien on your property, and then from your general contractor. Parties only provide this document concurrent with receiving final payment, since it removes their lien rights. The reason this is so important to secure from sub-contractors who have pre-liened is because it insures your general contractor has paid them in full (and ensures they won't come after you for payment if the general contractor flees with your money).

When it should be in place: You should get these from your general contractor concurrent with handing him or her final payment.

Notice of Completion

What is it: An official document filed with your county clerk's office stating your project is complete.

Why it's important: It starts the clock on your contractor's lien rights expiring. Check your local law, but anywhere from 30-90 days after it is filed, your property can't be liened by a contractor (unless they have done so already). This protects you from any liens that may pop-up long after your project is complete.

How you get it: Check your local legal document store for the right form used in your jurisdiction.

When it should be in place: It should be filed within a few days of your project ending.

Now you're aware of all the documents you need to effectively administer your remodel. It may seem like a lot of paperwork, but the majority is provided by your contractor before the job begins. It's well worth spending some time on these items to ensure you have the proper protection in place.



The End is Near - Tips for Cleanly and Quickly Closing Out Your Project

Sometimes crossing the finish line on your project is the hardest part. The last few details can be so frustrating! You want your project complete (and so does your contractor) but little items keep popping up, and pretty soon you feel like the job will never end.

There are a few things you and your contractor can do to get to the finish line. Some are based upon concepts we've covered, and others are new:

Respect the Finish Date

In Step 8, we talked about the project schedule, a sacred document issued by your contractor that shows when each element of your project should be completed.

When you get this schedule take a look at the finish date. Then put this date in your calendar. Then remind your contractor of this date weekly until the project is done. **Don't let this date die.** This date is important, because if it's forgotten, before you know it your project is behind schedule and the date is a distant memory.

There's really no purpose in creating a schedule and then not holding the team accountable for meeting it, so make sure you constantly check!

Create a Punch List

A punch list is a list of the items needing to be completed before the project owner deems the project "complete."

Any good contractor endeavors to have a "zero punch-list" project; meaning items are completed as they are noticed, not left to linger until the job is complete. (If your contractor says over and over "we'll take care of that at the end," beware. This is just like your kid telling you they'll "clean their room later...")

Alas, most projects have a few items that are not noticed until the job is substantially complete and cleaned up. No matter how many times you look at a job during construction, there are usually items you just didn't notice.

So, it's imperative to have a "punch walk" with your contractor right at the end of the job. Ideally, you'll have this walk after the work is complete, after the job is cleaned, and before you provide

final payment to your contractor. It's a good idea for both the project owner and contractor to make a list, or create one and then run a copy to ensure both parties agree.

It may also be helpful to take pictures of each item as you list them, just so there's additional back-up in case you need to refer back.

Your contractor should begin completing the punch list items immediately after the list is created.

Conduct a Punch List Follow-up Walk

Once your contractor indicates the punch list is complete, you should walk the job with him or her. Pull out your list and go through each item, making sure it's complete to your satisfaction.

If the list is complete, then your contractor should be paid promptly.

Nothing is as frustrating to a contractor as completing a punch list and then having payment withheld for "one more item I just noticed."

Will items pop up after you make final payment that need to be fixed?

Sure, on occasion, but under no circumstance should final payment be held on a contractor simply because you keep finding one more small thing. If you're concerned your contractor will not service your project post-payment, then you picked the wrong contractor. If you're still concerned, then hold back a small amount of the final payment until the last item is complete.

And this leads nicely into our last point...

Be Careful Before Releasing Final Payment

If you've followed our advice for the past 8 steps, the end of the job should be as pleasant as the beginning and middle.

However, there are lots of deadbeat contractors out there, so if you've made the wrong choice or were fooled in the beginning, you may need to play hardball.

Don't release final payment until you're satisfied with your project.

But be careful, make sure your level of satisfaction would hold up to an arbitrator, judge or jury, because that's the road you may be on. If you're withholding \$10,000 from your contractor because a door has a scratch, you're not playing fair. Figure out the cost to make the repair (if your contractor is responsible for the damage), then double it, and withhold that amount. That way you have the money to make the fix but you're not unreasonably holding funds.



Warranty and Closeout - After the Project is Complete

You're done! Now let's take a look at some post-project items you may encounter.

Warranty Items/Issues

A key reason to choose a reputable contractor is realized after the project is complete. Good contractors address warranty items promptly and thoroughly; bad contractors are nowhere to be found should an issue come up.

In terms of the letter of the law, contractors are required to warranty the workmanship of the project for a specific period of time. In California, this is one year. If a workmanship issue pops up within one year, your contractor has to make the repair. If not, they risk a claim being filed with the licensing board in addition to some legal action.

Since you chose a great contractor, you'll likely get fantastic service and support well beyond one year. After all, the contractor's reputation is at stake, and good business practices (not to mention common human decency) dictate customer service is paramount for future referrals.

One note: this warranty will not cover defective materials. The materials in your project carrying a manufacturer's warranty transfer to you once the project is complete. Now, your contractor should be willing and able to assist you through the repair process but remember, you own the warranty and have ultimate authority with the manufacturer.

Wrap-up Meeting

When the dust settles from your project, when the punch list is complete, when final payment is made, when you've had a little while to live in and enjoy your project, it's great to have a wrap-up meeting. During this meeting each party can check in, any after-the-punch-list items can be addressed, and most importantly, you can offer feedback to your contractor.

Perhaps you noticed something during construction that he or she could improve. Perhaps the contractor did something remarkable that you noted. Perhaps you just have general feedback regarding the process. No matter what, this short conversation can leave both parties knowing that everything is on the table, and is extraordinarily valuable to your contractor. Consider it a small gift for a job well-done.

Contractor Reviews

And finally, the most important thing you can do for your contractor: provide a review. Ideally, this would be a short 2-3 paragraph review answering some or all of these questions:

- What was the best part of working with your contractor?
- If you referred your contractor to a friend, how would you describe him or her?
- Did anything your contractor do surprise or delight you in some way?

The most helpful way to provide this review is to both email it to your contractor (for publication on marketing materials) and post it to an online review site (Yelp, Facebook, Google+, etc.)

This gives your contractor both future benefit and also increases their online reputation. The whole process might take 30-minutes; certainly a small token of appreciation for a job well-done!



Conclusion: Where to Go From Here

We hope you've enjoyed this e-book on getting an amazing kitchen and bathroom remodel. It took us quite a while to distill all of this information to writing, but we hope it benefits many of you in your remodel adventure.

We built kitchenCRATE and bathCRATE back in 2012. Since then we've grown both our corporately-owned franchise as well as launched a franchise system, currently looking for franchise partners in an assortment of Northern California locations.

If we can assist you in any way, either with a kitchenCRATE or bathCRATE, or provide more information on our franchise offering, here are a few helpful links.

www.mykitchencrate.com

www.mybathcrate.com

www.cratefranchisesystems.com

Cheers!

Scott Monday, Co-founder and CEO