STRONG ROOTS
BUILD • GROW • LIVE

# HOW TO EVALUATE A CUSTOM HOME BUILDER

*An Objective Guide for Prospective Custom Home Clients*

*Choosing a custom builder is one of the most consequential decisions you'll make in the construction process. This guide is designed to help you ask the right questions and evaluate any builder — including us — on the merits that matter most. A confident builder welcomes this scrutiny.*

| 1. Leadership & Communication | |
|---|---|
| **Clear communication structure** | A defined point of contact — project manager or superintendent — who gives consistent, scheduled updates throughout the build. |
| **Responsiveness** | Replies within 24 hours, provides clear written updates, and proactively flags issues before they become problems. |
| **Collaborative mindset** | Works seamlessly with your architect, interior designer, and consultants rather than trying to dominate or shortcut the process. |
| **Conflict resolution skill** | Handles client-requested changes or design disagreements constructively and without defensiveness. |

| 2. Organization & Process Discipline | |
|---|---|
| **Documented systems** | Uses a robust project management platform (e.g., BuilderTrend, ProCore) for RFIs, selections, schedules, and photos. |
| **Change-order protocol** | Every change has a written scope, documented cost impact, and owner sign-off before any work is executed. |
| **Schedule control** | Maintains an updated critical-path or Gantt chart with realistic milestones reviewed regularly with the client. |
| **Selection management** | Tracks all finish selections with deadlines so design decisions don't inadvertently stall framing or MEP work. |

| 3. Financial Transparency | |
|---|---|
| **Detailed budgets** | Breaks down every division with line-item pricing — not lump sums. You should know where every dollar is going. |
| **Allowance realism** | Uses market-appropriate allowances for luxury fixtures, stone, millwork, and appliances — not artificially low placeholders. |
| **Open-book practices** | On a cost-plus contract, shares invoices and subcontractor bids openly and willingly. |

| | |
|---|---|
| **Real-time budget updates** | Updates the budget at least weekly to show cost impacts and running totals in real time. |

| 4. Site Supervision & Craft Execution | |
|---|---|
| **Dedicated superintendent** | A full-time superintendent on site with authority to make decisions and enforce quality — not a part-time check-in. |
| **Clean, safe jobsite** | Orderly staging, secured materials, and professional signage — these reflect genuine culture and respect for your property. |
| **Phase-based quality walks** | Regular punch walks during each phase (framing, drywall, finishes) rather than waiting until the end to catch problems. |
| **Attention to detail** | Willingness to create mock-ups for finishes (stone smears, grout colors, trim reveals) before mass installation. |

| 5. Subcontractor Relationships | |
|---|---|
| **Stable trade network** | Long-standing subcontractors known for both reliability and craftsmanship — not whoever is cheapest that week. |
| **Timely payment reputation** | Subcontractors confirm they are paid promptly. Delayed sub payments are a leading cause of project delays. |
| **Trade specialization** | Uses different specialist teams for millwork, tile, and paint rather than all-purpose crews handling everything. |
| **Trade accountability** | Holds regular site coordination meetings with trades to manage sequencing and resolve conflicts proactively. |

| 6. Risk & Compliance Management | |
|---|---|
| **Insurance verification** | Maintains active general liability, workers' compensation, and builder's risk coverage — and can provide certificates. |
| **Permitting & inspections** | Handles coordination with local jurisdictions, engineers, and inspectors efficiently and without client burden. |
| **Documentation culture** | Keeps daily logs, photos, and inspection records — protecting both you and the builder throughout the warranty period. |

| 7. Professional Integrity & Fit | |
|---|---|
| **Financial stability** | Strong supplier and banking relationships. No history of liens, lawsuits, or contractor disputes. |
| **Contract clarity** | Uses detailed, attorney-vetted agreements outlining scope, payment milestones, escalation clauses, and warranties. |
| **Client advocacy** | Prioritizes your best interest when pricing subcontractors or sourcing materials — not the path of least resistance. |
| **Chemistry and trust** | Demonstrates empathy, patience, and professionalism. This relationship runs 12–18 months. It matters. |

| 8. Post-Completion Support |
|---|

| | |
|---|---|
| **Structured punch process** | Uses a formal close-out checklist before requesting the final draw — not a rushed final walkthrough. |
| **Warranty responsiveness** | Provides a one-year workmanship warranty with a clear, organized system for handling service requests. |
| **Follow-up visits** | Conducts 6- and 12-month walkthroughs to address settlement issues as the home completes its first year. |
| **Documentation hand-off** | Delivers O&M manuals, appliance warranties, paint schedules, and vendor contacts at turnover. |

## Three Principles Worth Keeping in Mind

| | | |
|---|---|---|
| **Process Trumps Portfolio**<br>A builder's systematic approach to planning, problem-solving, and communication will determine the success of your project far more than whether they've built a home that looks exactly like yours. Solid process applies to any style or square footage. A disorganized builder with a perfect portfolio match will still create chaos. | **Adaptability Is the Real Skill**<br>A builder skilled at realizing unique visions and navigating unfamiliar territory is often better than one who simply repeats the same project. Can they articulate how they'd approach your particular style, site, and budget? That matters more than showing you past work that looks identical. | **Your Situation Is Unique**<br>Your site, soil conditions, local code requirements, budget, and preferences won't perfectly match any past project regardless. A builder who can thoughtfully adapt to your circumstances beats one who just copies a previous job. That is, in essence, what custom home building means — no two are alike. |

## The Questions That Matter Most

When you sit down with any builder — in a formal interview or a casual walkthrough — these are the questions whose answers will tell you the most:

| | |
|---|---|
| **1.** | How do they problem-solve when they encounter something new? |
| **2.** | Can they clearly explain their specific approach to your project — site, style, and scope? |
| **3.** | Do subcontractors and past clients speak highly of their communication and follow-through? |
| **4.** | How do they handle budget accountability and timeline slippage? |
| **5.** | What is their system for quality control and inspections at each phase? |
| **6.** | Can they provide references from varied, unique projects — even if stylistically different from yours? |

A track record of successfully completing varied, custom work is a stronger indicator than a perfect portfolio match. It shows a builder who can ***think*** — not just repeat.

## Builder Evaluation Scorecard

*Use this checklist when interviewing and comparing builders. Rate each builder 1–5 or simply check the boxes to track your impressions.*

| Evaluation Criterion | Builder A | Builder B | Builder C | Notes |
|---|---|---|---|---|
| Clear communication structure & defined contact | /5 | /5 | /5 | /5 |
| Responsive within 24 hours; proactive communication | /5 | /5 | /5 | /5 |
| Collaborative with architect & design team | /5 | /5 | /5 | /5 |
| Uses documented project management platform | /5 | /5 | /5 | /5 |
| Written change-order protocol with sign-off | /5 | /5 | /5 | /5 |
| Maintains updated schedule with milestones | /5 | /5 | /5 | /5 |
| Line-item budgets — no lump sums | /5 | /5 | /5 | /5 |
| Realistic allowances for finishes & fixtures | /5 | /5 | /5 | /5 |
| Open-book practices (cost-plus) | /5 | /5 | /5 | /5 |
| Full-time dedicated superintendent on site | /5 | /5 | /5 | /5 |
| Clean, organized, professional jobsite | /5 | /5 | /5 | /5 |
| Phase-by-phase quality inspection walks | /5 | /5 | /5 | /5 |
| Stable long-term subcontractor network | /5 | /5 | /5 | /5 |
| Subs confirm timely payment history | /5 | /5 | /5 | /5 |
| Active insurance — GL, workers comp, builder's risk | /5 | /5 | /5 | /5 |
| Clear warranty terms & service request process | /5 | /5 | /5 | /5 |
| 6- and 12-month follow-up walkthrough | /5 | /5 | /5 | /5 |
| Documentation hand-off at turnover | /5 | /5 | /5 | /5 |
| No history of liens, lawsuits, or disputes | /5 | /5 | /5 | /5 |
| Strong chemistry & client trust | /5 | /5 | /5 | /5 |