LEEDWAY
GROUP

Worksheet 1: Project Vision & Lifestyle Priorities

This worksheet clarifies what success looks like for your project.

Project Type

☐ Custom Home
☐ Major Renovation
☐ Addition
☐ Commercial Project

Primary Goals

(Select all that apply)

☐ Improve functionality and layout
☐ Increase property value
☐ Enhance comfort and livability
☐ Improve energy efficiency / sustainability
☐ Modernize aesthetics
☐ Long-term family home
☐ Income or mixed-use potential

Lifestyle Considerations

☐ Entertaining / hosting
☐ Work-from-home

☐ Growing family
☐ Aging in place
☐ Privacy
☐ Low maintenance

Notes / Vision Statement:

Worksheet 2: Budget Awareness & Comfort Range

This worksheet helps establish realistic financial parameters without committing to final pricing.

Target Investment Range

☐ Conservative
☐ Balanced
☐ Premium
☐ Ultra-Luxury

Budget Flexibility

Where are you most comfortable adjusting if required?

☐ Overall project size
☐ Material and finish level
☐ Specialty features
☐ Timeline
☐ Sustainability / performance targets

Financial Readiness

☐ Financing strategy identified
☐ Comfortable with phased decisions
☐ Understand contingency importance
☐ Prepared for market-driven adjustments

Questions or Concerns:

_____

_____

Worksheet 3: Allowance Planning & Selections

Allowances apply to items not yet finalized. Early clarity improves cost certainty.

Category	Priority Level	Early Decision?	Notes
Flooring	☐ Low ☐ Med ☐ High	☐ Yes ☐ No	
Cabinetry & Millwork	☐ Low ☐ Med ☐ High	☐ Yes ☐ No	
Plumbing Fixtures	☐ Low ☐ Med ☐ High	☐ Yes ☐ No	
Lighting	☐ Low ☐ Med ☐ High	☐ Yes ☐ No	
Appliances	☐ Low ☐ Med ☐ High	☐ Yes ☐ No	
Hardware	☐ Low ☐ Med ☐ High	☐ Yes ☐ No	
Specialty Features	☐ Low ☐ Med ☐ High	☐ Yes ☐ No	

Key Guidance:
Selections with higher variability have greater impact on budget accuracy.

Worksheet 4: Upgrade vs. Long-Term Value Assessment

This worksheet helps prioritize investments that deliver lasting value.

Category	Value Impact	Hard to Upgrade Later?	Priority
Building Envelope	High	Yes	☐ High ☐ Med ☐ Low
Mechanical Systems	High	Yes	☐ High ☐ Med ☐ Low
Structural Enhancements	High	Yes	☐ High ☐ Med ☐ Low
Insulation / Air Sealing	High	Yes	☐ High ☐ Med ☐ Low
Custom Millwork	Medium	No	☐ High ☐ Med ☐ Low
Decorative Finishes	Low	No	☐ High ☐ Med ☐ Low

Decision Lens:

Prioritize performance, durability, and systems before finishes.
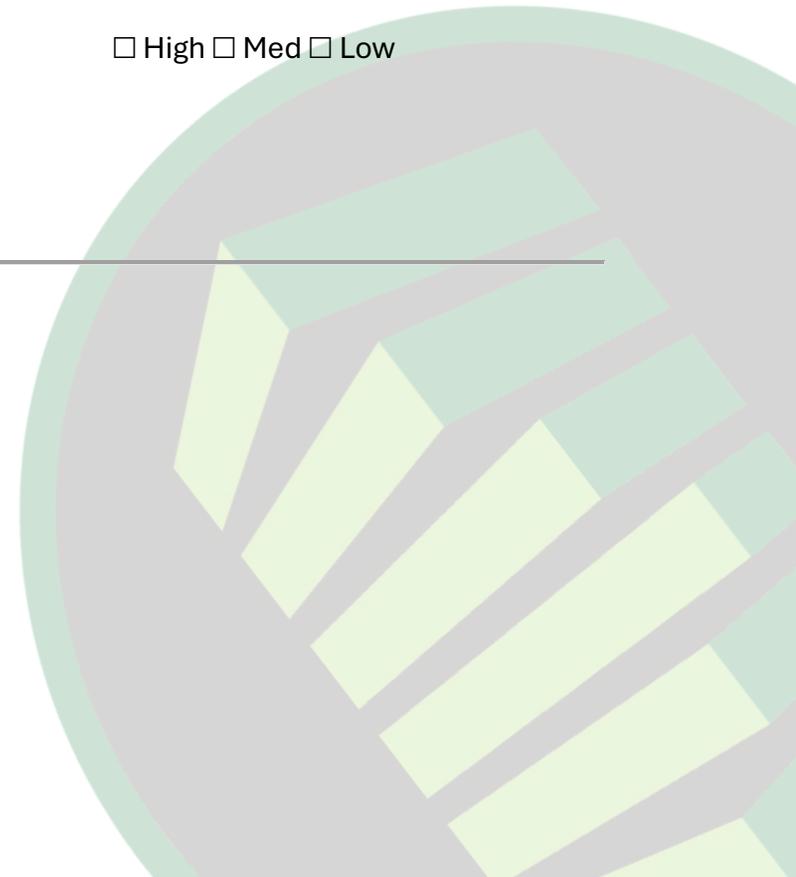
Worksheet 5: Timeline Expectations & Flexibility

Understanding schedule variables leads to better outcomes.

Timeline Sensitivity

☐ Fixed move-in date
☐ Some flexibility
☐ Flexible

Understanding Delays

I understand that timelines may be affected by:
☐ Design revisions
☐ Permit approvals
☐ Material lead times
☐ Weather conditions
☐ Client-initiated changes

Decision Responsiveness

☐ Comfortable making timely decisions
☐ Prefer structured decision milestones
☐ Require extended review time

Worksheet 6: Renovation-Specific Risk Awareness *(if applicable)*

☐ Aware of hidden conditions (framing, plumbing, electrical)
☐ Understand scope adjustments may be required
☐ Comfortable with contingency usage
☐ Prefer conservative planning

Primary Concerns:

_____

_____

Worksheet 7: Communication & Decision-Making Preferences

Primary Contact

Name: _____

Preferred Communication Method

☐ Email
☐ Phone
☐ In-person meetings
☐ Scheduled updates

Update Frequency Preference

☐ Weekly
☐ Bi-weekly
☐ Milestone-based

Worksheet 8: Final Alignment & Readiness Check

☐ Project goals are clear
☐ Budget expectations are realistic

☐ Scope flexibility is understood
☐ Timeline expectations are aligned
☐ Comfortable proceeding to design and pricing

Interior Finishes & Fixtures

Category	Priority	Early Decision?	Cost Variability	Notes
Flooring – Main Areas	☐ L ☐ M ☐ H	☐ Yes ☐ No	☐ Low ☐ Med ☐ High	Wood species, plank width, install method
Flooring – Secondary Areas	☐ L ☐ M ☐ H	☐ Yes ☐ No	☐ Low ☐ Med ☐ High	Tile size, pattern
Stair Finishes	☐ L ☐ M ☐ H	☐ Yes ☐ No	☐ Low ☐ Med ☐ High	Wood, glass, steel
Interior Doors & Hardware	☐ L ☐ M ☐ H	☐ Yes ☐ No	☐ Low ☐ Med ☐ High	Solid core, custom profiles
Trim & Mouldings	☐ L ☐ M ☐ H	☐ Yes ☐ No	☐ Low ☐ Med ☐ High	Profiles, heights
Paint & Wall Finishes	☐ L ☐ M ☐ H	☐ Yes ☐ No	☐ Low ☐ Med ☐ High	Level of prep, specialty finishes

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Kitchen & Millwork

Category	Priority	Early Decision?	Cost Variability	Notes
Kitchen Cabinetry	☐ L ☐ M ☐ H	☐ Yes ☐ No	☐ Low ☐ Med ☐ High	Custom vs semi-custom
Cabinet Interior Accessories	☐ L ☐ M ☐ H	☐ Yes ☐ No	☐ Low ☐ Med ☐ High	Pull-outs, organizers

Category	Priority	Early Decision?	Cost Variability	Notes
Countertops	☐ L ☐ M ☐ H	☐ Yes ☐ No	☐ Low ☐ Med ☐ High	Quartz vs natural stone
Backsplash	☐ L ☐ M ☐ H	☐ Yes ☐ No	☐ Low ☐ Med ☐ High	Tile complexity
Kitchen Appliances	☐ L ☐ M ☐ H	☐ Yes ☐ No	☐ Low ☐ Med ☐ High	Integrated, professional-grade
Specialty Features	☐ L ☐ M ☐ H	☐ Yes ☐ No	☐ Low ☐ Med ☐ High	Pantry, wine storage

Bathrooms & Plumbing

Category	Priority	Early Decision?	Cost Variability	Notes
Plumbing Fixtures	☐ L ☐ M ☐ H	☐ Yes ☐ No	☐ Low ☐ Med ☐ High	Brand, finish
Shower Systems	☐ L ☐ M ☐ H	☐ Yes ☐ No	☐ Low ☐ Med ☐ High	Body sprays, digital controls
Vanities	☐ L ☐ M ☐ H	☐ Yes ☐ No	☐ Low ☐ Med ☐ High	Custom vs prefabricated
Tile & Waterproofing	☐ L ☐ M ☐ H	☐ Yes ☐ No	☐ Low ☐ Med ☐ High	Tile size, layout
Freestanding Tubs	☐ L ☐ M ☐ H	☐ Yes ☐ No	☐ Low ☐ Med ☐ High	Structural requirements

Lighting, Electrical & Technology

Category	Priority	Early Decision?	Cost Variability	Notes
Lighting Fixtures	☐ L ☐ M ☐ H	☐ Yes ☐ No	☐ Low ☐ Med ☐ High	Decorative vs architectural
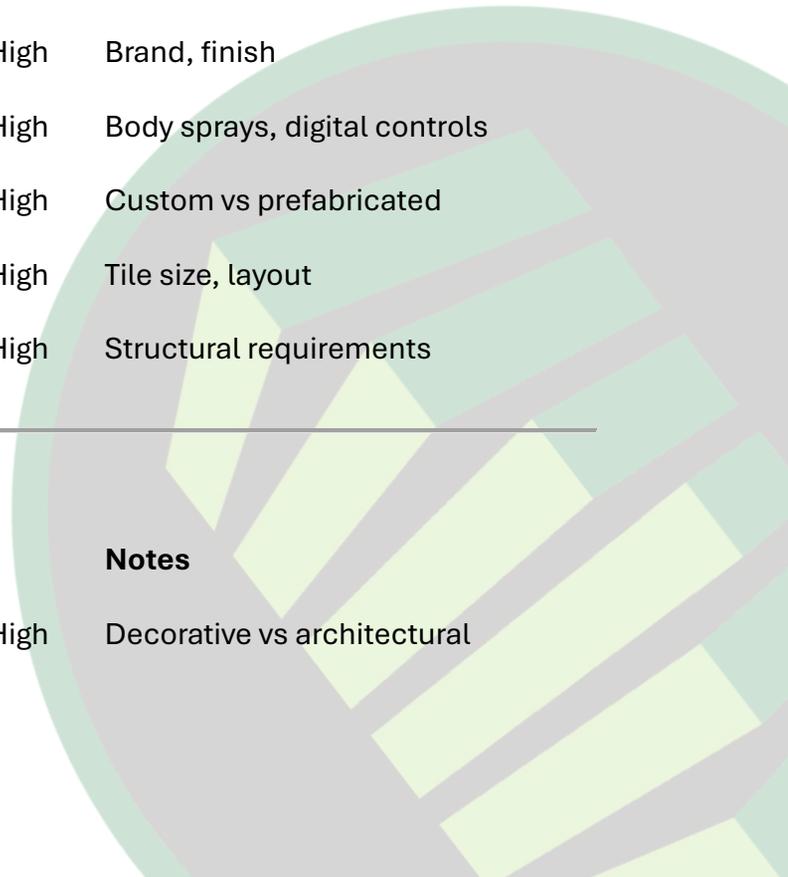
Category	Priority	Early Decision?	Cost Variability	Notes
Lighting Controls	☐ L ☐ M ☐ H	☐ Yes ☐ No	☐ Low ☐ Med ☐ High	Dimming, smart controls
Smart Home Infrastructure	☐ L ☐ M ☐ H	☐ Yes ☐ No	☐ Low ☐ Med ☐ High	Wiring, hubs
Audio / Visual	☐ L ☐ M ☐ H	☐ Yes ☐ No	☐ Low ☐ Med ☐ High	Whole-home vs zones
Security Systems	☐ L ☐ M ☐ H	☐ Yes ☐ No	☐ Low ☐ Med ☐ High	Cameras, access control

Exterior & Site Elements

Category	Priority	Early Decision?	Cost Variability	Notes
Windows & Doors	☐ L ☐ M ☐ H	☐ Yes ☐ No	☐ Low ☐ Med ☐ High	Performance, material
Exterior Cladding	☐ L ☐ M ☐ H	☐ Yes ☐ No	☐ Low ☐ Med ☐ High	Brick, stone, metal
Decks & Railings	☐ L ☐ M ☐ H	☐ Yes ☐ No	☐ Low ☐ Med ☐ High	Wood vs composite
Driveway & Hardscape	☐ L ☐ M ☐ H	☐ Yes ☐ No	☐ Low ☐ Med ☐ High	Pavers vs poured concrete
Landscaping Allowances	☐ L ☐ M ☐ H	☐ Yes ☐ No	☐ Low ☐ Med ☐ High	Softscape vs hardscape

Client Guidance

The greater the number of unresolved selections, the wider the cost range. Early alignment improves pricing accuracy and schedule reliability.

**Worksheet 4: Upgrade vs. Long-Term Value Assessment**

Purpose:
This worksheet helps prioritize **investments that are difficult to change later** and deliver long-term performance, comfort, and durability.

Building Envelope & Structure

Category	Upfront Cost	Long-Term Value	Upgrade Later?	Priority
Foundation Enhancements	Med	Very High	No	☐ H ☐ M ☐ L
Structural Framing Upgrades	Med	High	No	☐ H ☐ M ☐ L
High-Performance Windows	Med–High	Very High	No	☐ H ☐ M ☐ L
Insulation Levels	Med	Very High	No	☐ H ☐ M ☐ L
Air Sealing	Low–Med	Very High	No	☐ H ☐ M ☐ L
Roofing Assembly	Med	High	Difficult	☐ H ☐ M ☐ L

Mechanical, Electrical & Plumbing Systems

Category	Upfront Cost	Long-Term Value	Upgrade Later?	Priority
HVAC System Quality	Med–High	Very High	No	☐ H ☐ M ☐ L
Heat Recovery Ventilation	Med	High	Difficult	☐ H ☐ M ☐ L
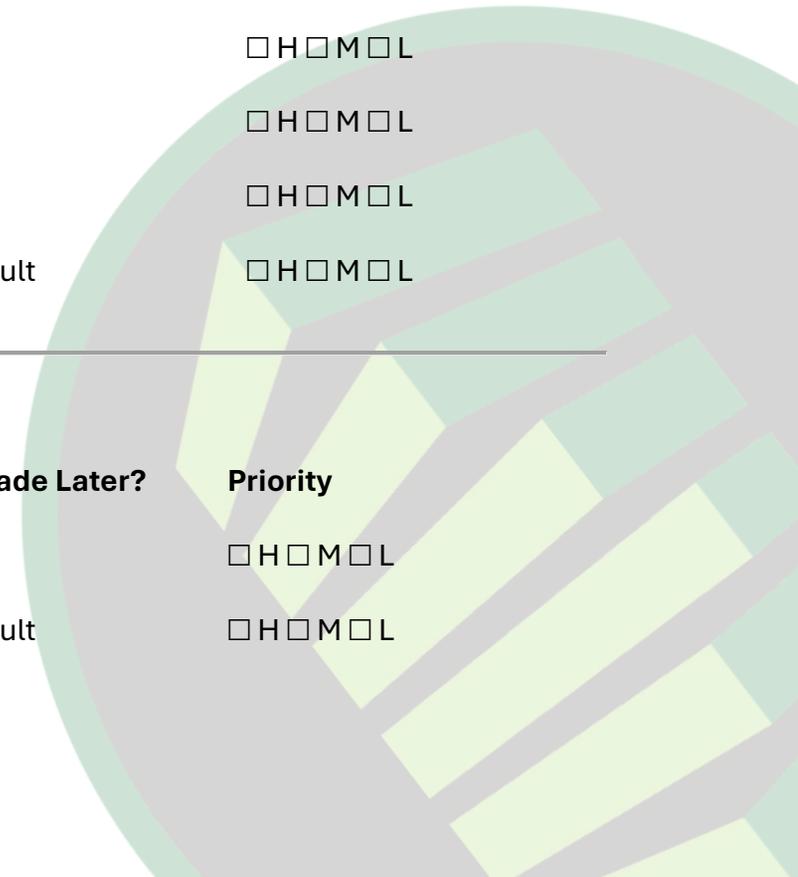
Category	Upfront Cost	Long-Term Value	Upgrade Later?	Priority
Domestic Hot Water System	Med	High	Difficult	☐ H ☐ M ☐ L
Electrical Capacity	Low–Med	High	Difficult	☐ H ☐ M ☐ L
Plumbing Infrastructure	Med	High	Difficult	☐ H ☐ M ☐ L

Energy, Sustainability & Performance

Category	Upfront Cost	Long-Term Value	Upgrade Later?	Priority
Solar Readiness	Low–Med	Medium–High	Yes	☐ H ☐ M ☐ L
EV Charging Infrastructure	Low	High	Yes	☐ H ☐ M ☐ L
High-Efficiency Fixtures	Low	Medium	Yes	☐ H ☐ M ☐ L
Building Automation	Med	Medium–High	Yes	☐ H ☐ M ☐ L

Interior & Lifestyle Enhancements

Category	Upfront Cost	Long-Term Value	Upgrade Later?	Priority
Custom Millwork	High	Medium	Yes	☐ H ☐ M ☐ L
Specialty Rooms	High	Medium	Difficult	☐ H ☐ M ☐ L
Decorative Lighting	Med	Medium	Yes	☐ H ☐ M ☐ L
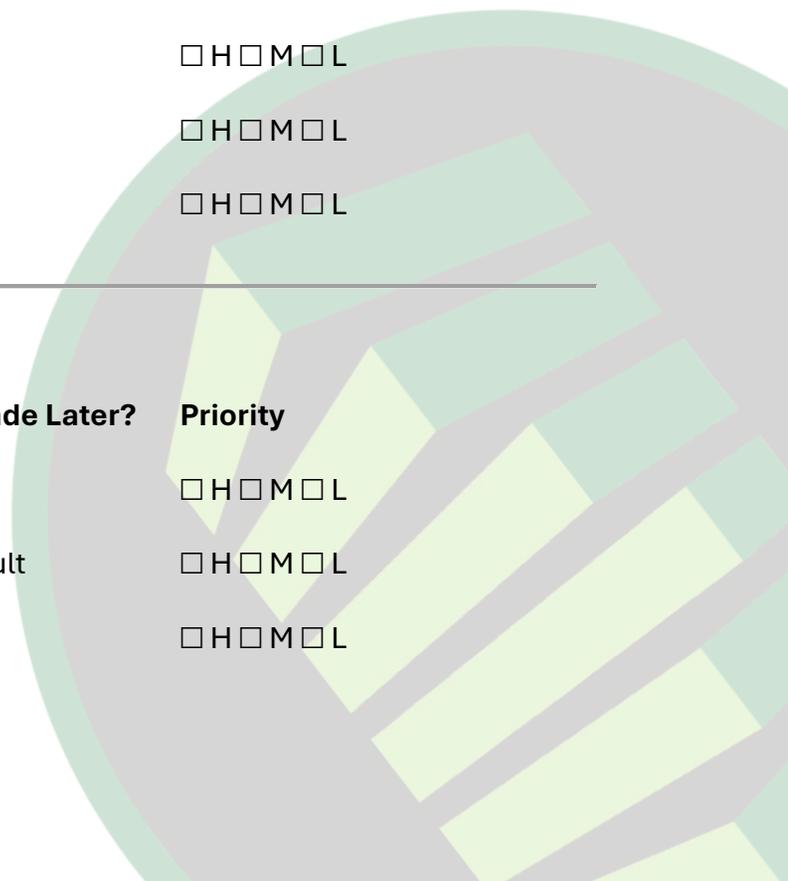
Category	Upfront Cost	Long-Term Value	Upgrade Later?	Priority
Luxury Finishes	Med–High	Low–Medium	Yes	☐ H ☐ M ☐ L