

Custom Home **Planning Pack:**

Designed for WA Home Builders

Expert Guidance From WA's
Custom Home Specialists



Welcome + Instructions

Congratulations on starting your custom home journey! This downloadable pack has been created by Shelford Quality Homes to help you get organised, inspired, and in control of your build from the very first step. With over 34 years of experience building custom homes across Western Australia, we've guided hundreds of families through this exciting process and understand exactly what you need to know before you begin.

Our team of Design Consultants and building specialists has compiled these resources based on the questions and challenges we see most often, ensuring you have the tools to make confident decisions throughout your building journey. Whether you're just starting to dream or ready to break ground, these worksheets and planners will help you clarify your vision, organise your thoughts, and communicate effectively with your builder.

Print it out or fill it in digitally – it's yours to use however works best for you. And remember, when you're ready to take the next step, our experienced team is just a phone call away to provide personalised guidance for your unique custom home project.



ORious?
I can do



Budget Planner Worksheet

PLANNING YOUR CUSTOM HOME INVESTMENT

Use this comprehensive budget planner to account for all aspects of your custom home project. Being realistic about costs from the start helps avoid surprises later.

CATEGORY	ESTIMATED BUDGET	NOTES
Land Purchase	\$	Include settlement costs, taxes, and fees
Siteworks & Preparation	\$	Clearing, leveling, retaining walls, driveways
Engineering & Soil Testing	\$	Structural engineering, soil classification
Bushfire Requirements (BAL)	\$	Higher BAL ratings increase construction costs
Coastal Building Requirements	\$	Corrosion-resistant materials, wind ratings
Energy Efficiency (7-Star)	\$	Insulation, glazing, sustainable features
Council & Planning Approvals	\$	Application fees, planning reports
Base Build Cost	\$	Core construction costs per your contract
Selections & Upgrades	\$	Finishes, fixtures, appliances beyond standard
Electrical Upgrades	\$	Additional points, smart wiring, special lighting
Landscaping & Gardens	\$	Plants, irrigation, garden beds
Outdoor Areas & Paving	\$	Alfresco, pool area, additional concrete
Fencing & Gates	\$	Boundary and feature fencing
Window Treatments	\$	Curtains, blinds, shutters
Furniture & Decor	\$	New furniture pieces, artwork, accessories
Technology & Automation	\$	Home automation, security, entertainment
Contingency Buffer (10%)	\$	Essential for unexpected costs
Total Estimated Investment	\$	

Budget Planner Tip Box

Common Budget Oversights to Watch For

Site-Specific Costs:

Rocky soil, steep slopes, and limited access can add thousands to sitework costs. Get a soil test and contour survey before finalising your budget.

Council Requirements:

Local planning policies may require specific materials or design features not included in standard pricing.

Utility Connections:

Costs for connecting to services (water, electricity, gas, NBN) vary widely depending on your location and can be substantial in new or rural areas.

Temporary Accommodation:

If selling your current home before completion, factor in rental costs during the building period, which may extend longer than initially estimated.

Window Treatments:

Often overlooked in initial budgets but can be a significant expense, especially for large or custom windows.

Landscaping Reality:

Basic landscaping packages rarely cover everything you'll want. Set aside at least 5-10% of your build cost for creating outdoor spaces you'll love.

Future-Proofing:

Consider allocating budget for smart home wiring, solar-readiness, or EV charging infrastructure, even if you won't install everything immediately.

Price Escalation:

For longer builds, materials and labor costs may increase. Discuss how your contract addresses potential price changes over time.

Pro
Tip:

Rather than stretching your budget to its absolute limit, aim to keep a 10% contingency for unexpected costs and opportunities that arise during your build.



Home Design **Wishlist**

Your Dream Home Features

Rate each item from 1-5 stars (☆) based on importance to you

MUST-HAVES

These are your non-negotiable features



KITCHEN & DINING

Open-plan living ☐ ☐ ☐ ☐ ☐

Scullery/butler's pantry ☐ ☐ ☐ ☐ ☐

Island bench with seating ☐ ☐ ☐ ☐ ☐

Walk-in pantry ☐ ☐ ☐ ☐ ☐

Other: _____ ☐ ☐ ☐ ☐ ☐



LIVING SPACES

Home office/study ☐ ☐ ☐ ☐ ☐

Media/theatre room ☐ ☐ ☐ ☐ ☐

Kids' activity area ☐ ☐ ☐ ☐ ☐

Other: _____ ☐ ☐ ☐ ☐ ☐



OUTDOOR LIVING

Large alfresco area ☐ ☐ ☐ ☐ ☐

Outdoor kitchen ☐ ☐ ☐ ☐ ☐

Pool/spa provision ☐ ☐ ☐ ☐ ☐

Other: _____ ☐ ☐ ☐ ☐ ☐



BEDROOMS & BATHROOMS

Guest suite/granny flat ☆☆☆☆☆

Master with ensuite & WIR ☆☆☆☆☆

Kids' wing ☆☆☆☆☆

Other: _____ ☆☆☆☆☆

Nice To Have

These enhance your lifestyle but could be compromised if needed



DESIGN FEATURES

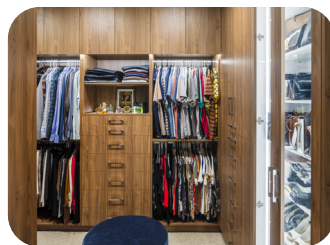
Feature lighting ☆☆☆☆☆

Skylights/voids ☆☆☆☆☆

Feature ceilings ☆☆☆☆☆

Stone benchtops ☆☆☆☆☆

Other: _____ ☆☆☆☆☆



PRACTICAL ADDITIONS

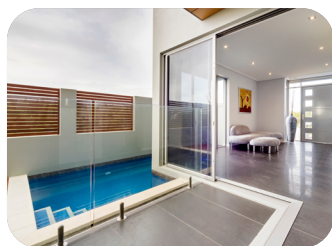
Smart home wiring ☆☆☆☆☆

Built-in storage solutions ☆☆☆☆☆

Mud room/drop zone ☆☆☆☆☆

Laundry with drying area ☆☆☆☆☆

Other: _____ ☆☆☆☆☆



SUSTAINABILITY FEATURES

Solar panel provision ☆☆☆☆☆

Battery storage readiness ☆☆☆☆☆

Water-wise landscaping ☆☆☆☆☆

EV charging capability ☆☆☆☆☆

Other: _____ ☆☆☆☆☆

ABSOLUTE DEAL-BREAKERS

List 3 features you absolutely cannot compromise on

1. _____

2. _____

3. _____

Future Considerations

Features to accommodate changing needs over time

Wider doorways/passages for accessibility

Ground floor bedroom potential

Flexible spaces that can change function

Ability to add on later

Other: _____

Pro Tip:

Think about your daily routines and how you actually live, not just what looks good in display homes. The most successful custom designs reflect your real lifestyle needs.





Vision Board Template

BRING YOUR DREAM HOME TO LIFE

Use this space to collect images, colors, and ideas that inspire you. Print and attach physical samples, or drag and drop digital images if using electronically.

EXTERIOR STYLE & FAÇADE

- What architectural style speaks to you?

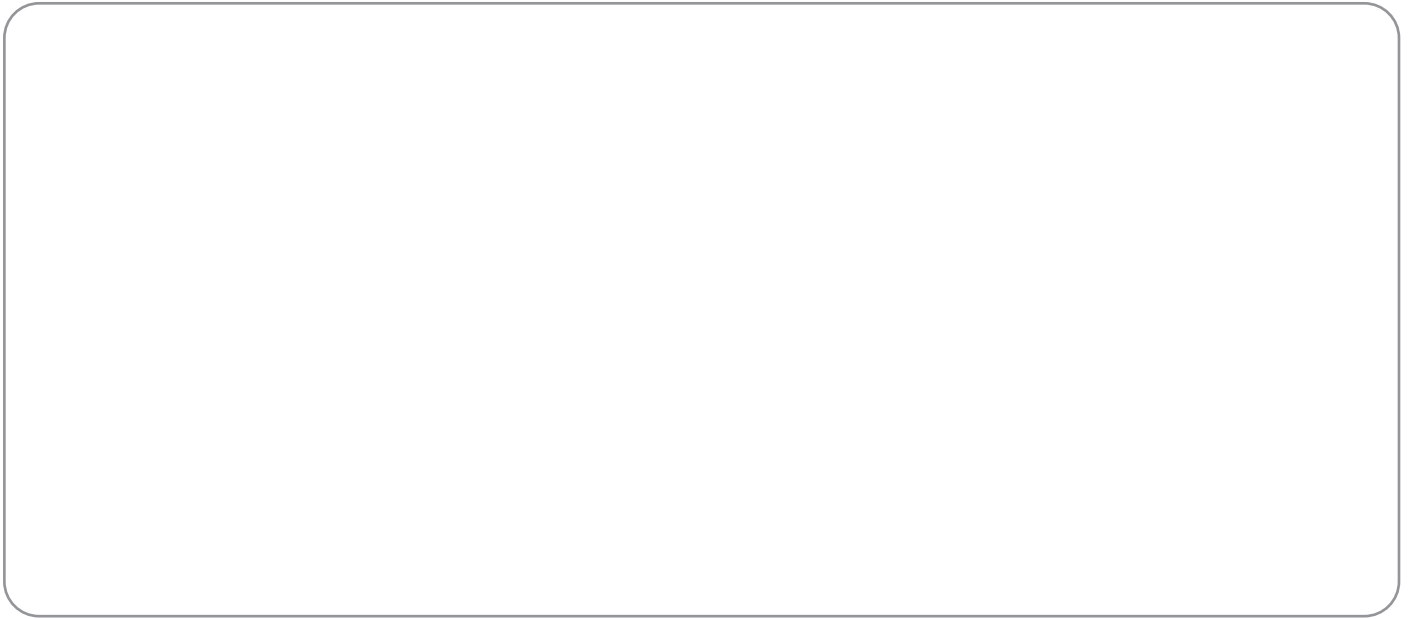
Consider: Street appeal, materials, roof design, entry feature

Questions to
ask yourself:

Modern or traditional? Light or dark palette?
Statement or subtle?

KITCHEN & LIVING SPACES

- The heart of your home



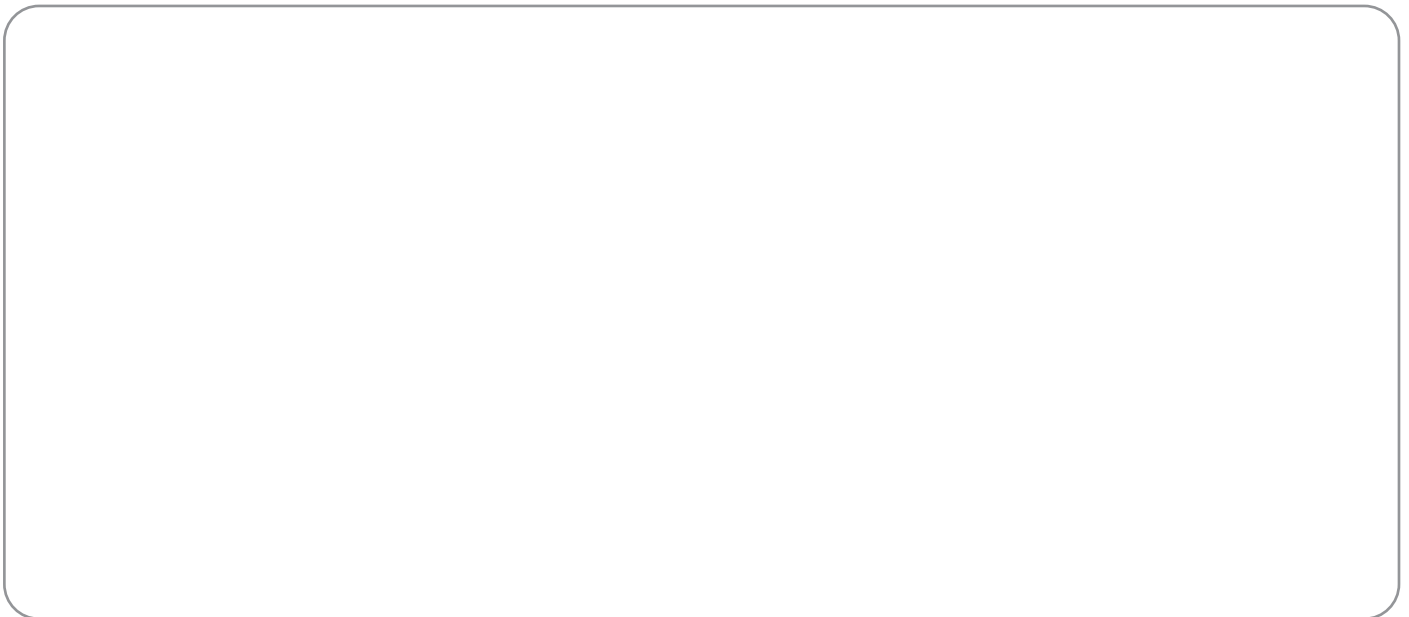
Consider: Layout, island design, appliances, connection to dining

How do you entertain? Do you need zones for different activities?

Questions to
ask yourself:

MASTER RETREAT

- Your personal sanctuary



Consider: Bedroom size, ensuite features, wardrobe design

Questions to
ask yourself:

What makes a relaxing space for you? What storage solutions do you need?

COLOR PALETTE & MATERIALS

- The elements that tie your home together

- **Consider:** Flooring, cabinetry, benchtops, wall colors, fixtures

Light or dark? Warm or cool tones? Statement or subtle?

Questions to
ask yourself:

OUTDOOR LIVING

- Extending your home into nature


- **Consider:** Alfresco design, landscaping, pool area, outdoor kitchen

Questions to
ask yourself:

How will you use this space throughout the year?

INSPIRATION FROM SHELFORD HOMES

- Some of our favourite custom designs to spark ideas



Pro
Tip:

Save images from our website gallery or take photos at our display homes to include here!

Design
Notes:

Record any specific thoughts or must-have elements here

Remember: Your vision board is a communication tool to help our designers understand your style and preferences. The more specific you can be, the better we can bring your vision to life!

Must-Ask Builder Questions

COMPARING BUILDERS: THE ESSENTIAL QUESTIONS

Use this page to record answers from different builders you're considering. These questions will help reveal important differences in value, service, and approach.

QUESTIONS	BUILDER 1	BUILDER 2	BUILDER 3
<p>1. What exactly is included in your base price?</p> <p>Look for detailed specifications, not just general descriptions. Ask about standard inclusions for kitchens, bathrooms, and flooring.</p>			
<p>2. How do you handle variations and upgrades?</p> <p>Understanding the process and any additional fees for changes is crucial. Ask about their documentation system.</p>			
<p>3. Do you offer fixed-price contracts?</p> <p>What exclusions or conditions might cause the price to change? Are site works fixed or provisional?</p>			
<p>4. Who will be my point of contact throughout the build?</p> <p>Will you have a dedicated supervisor or client liaison? How often will they communicate with you?</p>			
<p>5. Do you offer design consultation or custom floorplans?</p> <p>Is this service included or an additional cost? Who will work with you on the design?</p>			
<p>6. What is your experience with similar homes/blocks to mine?</p> <p>Ask for examples of comparable projects they've completed, especially if you have unusual requirements.</p>			
<p>7. How do you approach energy efficiency and sustainability?</p> <p>Beyond meeting minimum 7-star requirements, what additional options do they offer?</p>			
<p>8. What sets you apart from other builders?</p> <p>Listen carefully to understand their values and what they believe makes them different.</p>			

RED FLAGS TO WATCH FOR:

- Vague answers about inclusions or specifications
- Reluctance to provide references from recent clients
- Unusually low prices without clear explanation
- Pressure to sign quickly without adequate information
- Limited flexibility with design changes
- Poor communication during the quote/inquiry process

QUESTIONS TO ASK YOURSELF AFTER EACH MEETING:

- Did they listen more than they talked?
- Did they ask thoughtful questions about my needs?
- Do I feel comfortable communicating with them?
- Were they transparent about potential challenges?
- Did they explain things clearly without industry jargon?

Pro
Tip:

Don't just compare bottom-line prices. The most important factor is often the builder's communication style and whether you feel they truly understand your vision



Your Custom Home Journey Timeline

Use this planner to map out your building journey and track important milestones. Understanding timeframes will help you plan your life around your build.

STAGE	TARGET DATE	NOTES & ACTION ITEMS
Land Settlement		<ul style="list-style-type: none">• Arrange soil test & contour survey• Check covenant requirements• Research local council requirements
Builder Selection		<ul style="list-style-type: none">• Complete builder interviews• Check references & display homes• Review quotes & inclusions
Design Finalised		<ul style="list-style-type: none">• Confirm floor plan & elevations• Review preliminary specifications• Consider future needs & adaptability• Best to do all your structural changes here.
Pricing		<ul style="list-style-type: none">• Builder to price the home build and any other extra variations.
Preliminary Agreement Signed		<ul style="list-style-type: none">• Pay initial deposit• Confirm timeline expectations• Discuss communication preferences
Finance Approval		<ul style="list-style-type: none">• Submit all required documentation• Arrange valuation if required• Confirm loan structure & repayments
Building Contract Signed		<ul style="list-style-type: none">• Review all contract details carefully• Clarify any uncertainties• Confirm variations process• Working drawings for your home should be finalised, and all the relevant reports should be in with the builder
Prestart Selections Complete		<ul style="list-style-type: none">• Research options before appointments• Bring inspiration images• Stay within budget allocations• Any extra variations from pre-start to be priced and confirmed

Building Permit Received		<ul style="list-style-type: none"> • Council processing time varies • May require additional information • Consider any neighbour notifications
Slab Down		<ul style="list-style-type: none"> • First progress payment typically due • Verify dimensions & positioning • First opportunity to see your home's footprint
Brick Stage		<ul style="list-style-type: none"> • Progress payment • Walk through to visualize spaces • Confirm window placements
Lockup Stage		<ul style="list-style-type: none"> • Progress payment • Roof on, windows & external doors installed • Home is secured against weather
Internal Fit-Out		<ul style="list-style-type: none"> • Progress payment • Cabinetry, plasterboard, painting, flooring • Begin planning furniture & window treatments
Practical Completion		<ul style="list-style-type: none"> • Final inspection & handover • Document any minor defects • Final payment due
Move-In Date		<ul style="list-style-type: none"> • Arrange utilities connections • Organise moving logistics • Begin enjoying your custom home!

IMPORTANT CONTACTS

ROLE	NAME	PHONE	EMAIL
Sales and Design Consultant			
Pre-Start Consultant			
Client Liaison			
Construction Supervisor			
Finance Broker/Bank			
Council Contact			

Planning Tip

Work backward from your ideal move-in date, but allow flexibility. Weather, material availability, and approval processes can all impact timelines. Always have a contingency plan for accommodation if delays occur.

Communication Tip

Schedule regular site visits (with builder approval) to see progress, but limit unscheduled drop-ins which can disrupt work. Take photos at each stage to document your journey!

Resources & Next Steps

HELPFUL RESOURCES TO SUPPORT YOUR JOURNEY

Learn More

Explore these articles on our website for deeper insights:

Understanding the
Custom Design
Process

Your Guide to
Buying Land and
Building

Selecting the Perfect
Block

Our Custom Home
Gallery

Connect With Our Team

Our design consultants are ready to help bring your vision to life:





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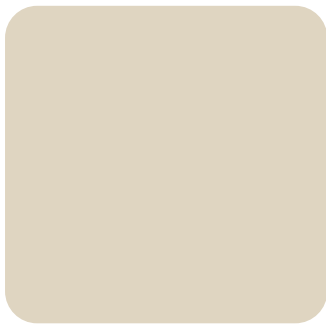
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Experience our quality craftsmanship firsthand

Perth Metro



Ready to
Fall in Love?

Scan to Lock in Your Private Home Tour!



Don't lose your valuable planning work: We'll send a PDF copy of your completed planning pack to your email address

READY FOR EXPERT GUIDANCE?

Share your completed pack with us for personalized feedback: Once you've filled in your planning pack, we'd be happy to review it and provide personalised insights based on your specific needs and vision. This complimentary consultation can help refine your ideas and identify opportunities you might not have considered.



Custom Home **Planning Pack:**

Build with Confidence

