



SAMPLE PACKET. Fictional project, invented details, for illustration of the real form (PKT-01).

SMP-01 · Completed Sample · Custom New Home, Blount County

Built on form PKT-01 (Qualification Packet Working Form v2). Every name, address, and figure below is invented.

Packet ID: GM-2026-014 · **Client:** Daniel and Priya Nair · **Opened:** October 5, 2026

Part 1 · Stage 1 Screening Record (first contact)

Field	Entry
Source	Site form, October 5, 2026, followed by screening call same day
Project type	New build, custom single-family home
Estimated budget range stated	\$575,000 to \$650,000 total
Desired timeline or urgency	Start spring 2027, in the home before the 2027 school year
Current status	Exploring. Land under contract. No plans drawn yet, architect not yet engaged
Primary decision-maker	Daniel Nair (lead contact), decisions made jointly
Others involved	Spouse (Priya Nair, co-decision-maker). Lender (community bank, Knoxville). No investor
Prior contractor or builder experience	1 kitchen remodel in Ohio, 2021, completed with a local contractor, no disputes

Red flag screen:

- ☐ Unwilling to discuss budget in any range: clear, full range given on the first call
- ☐ "Figure it out as we go" on major scope or money: clear
- ☐ Multiple decision-makers, no clear lead: clear, joint decisions, 1 lead contact named
- ☐ Wants immediate start with no plans, permits, or discovery: clear, spring 2027 start accepted
- ☐ Disrespectful tone in the first conversation: clear
- ☐ Wants a detailed free deliverable before scope is agreed: clear

Stage 1 result: ADVANCE to questionnaire, October 5, 2026, Grandmark.

Part 2 · Project Questionnaire (submitted on the Grandmark questionnaire form)

Submitted via grandmarkinc.com/intake.html, October 7, 2026.

Form field	Answer
Full name	Daniel Nair and Priya Nair
Phone	On file
Email	On file
Property address, including county	Parcel under contract, Blount County, Tennessee (street address on file)
What is your total budget or project size? Range is fine.	\$610,000 total project budget
What is your ideal completion date?	July 31, 2027, before the 2027 school year starts
Tell us about your project.	New custom home, 2,150 sq ft, 3 bedrooms plus a dedicated office, on a 0.8 acre lot we are buying in Blount County. Moderate slope, septic, public water at the road.
Do you have plans, drawings, or a scope document?	No. Floor plan sketches collected from plan sites, no architect engaged yet
Who will make final decisions on this project? (First and Last Name of each.)	Daniel Nair and Priya Nair, jointly
Are other stakeholders involved (partner, spouse, lender, investor)? If so, please list them below.	Lender: community bank, Knoxville, construction loan pre-approval in hand
How do you prefer to receive updates?	Email, weekly. Text for scheduling only
What are your top 3 priorities?	1. Completion before the 2027 school year. 2. Fixed budget ceiling at \$610,000. 3. 3 bedrooms plus a dedicated office, because both work from home part of the week
Any payment structure preferences or constraints?	Construction loan with standard draw schedule. No cash gap funding beyond the \$15,000 contingency
Land status	Under contract
Financing path	Construction loan
Other: Anything else we should know?	Relocated to the Knoxville area for work; both started new roles September 2026 and are in a 12-month rental

Part 3 · Stage 3 Walkthrough / Discovery Record

Held on site October 10, 2026, with Daniel Nair and Priya Nair. Confirmations:

- ☒ Budget is real and discussed openly in a range: yes, \$610,000 ceiling stated and held through the full walkthrough

- ☒ Scope is clear enough to move forward, or the path to clear scope is agreed: yes, path agreed, clients engage an architect or buy a licensed plan set before builder pricing is finalised
- ☒ Communication style and expectations aligned: yes, weekly email update, decisions within 3 business days
- ☒ Decision-maker present and engaged: yes, both decision makers present for the full walkthrough
- ☒ Project is feasible for the partner network: yes, large residential partner profile (custom homes, 2,000 to 2,600 sq ft band) fits on size, county, and spring 2027 capacity
- ☒ Overall read: clean, professional engagement expected: yes

Site facts captured at walkthrough:

Item	Finding
Parcel size, slope, buildable area	0.8 acre lot, moderate slope falling away from the road, flat buildable pad of roughly 0.4 acre at the front half
Access and driveway	Road frontage on a paved county road. No driveway cut yet, roughly 80 ft of drive to the buildable pad
Water	Public water at the road, tap fee not yet paid
Sewer	Septic. No public sewer on this road
Septic evaluation or perc	Done, September 2026, passed for a 4-bedroom system, report on file
Power and gas	Power at the road on the lot frontage. No natural gas on this road, clients accept electric and propane
Survey	Ordered October 8, 2026, due before land closing. Not yet on file
Zoning, HOA, setbacks, easements	County zoning confirmed residential. No HOA. Standard setbacks apply. No easements found on the contract plat
Photos taken	14 photos, lot, road frontage, slope, and neighbouring homes, filed with this packet

Part 4 · Budget and Financing Verification

Line	Amount
Total project budget	\$610,000
Land cost committed or allowed	\$62,000 (lot under contract, closing in 3 weeks)
Construction budget inside the total	\$505,000
Site work allowance	\$28,000 (septic system, driveway, utility taps and runs)
Contingency held by client	\$15,000

- Cost check: construction budget \$505,000 on 2,150 sq ft equals \$235 per sq ft. Grandmark cost guide range for Knoxville pod custom work is \$225 to \$325 per sq ft (October 2026 edition), which puts a 2,150 sq ft build at \$484,000 to \$699,000. Verdict: INSIDE RANGE at the low end. Note TIGHT on finishes: the \$505,000 figure supports the mid finish level the clients selected only if finish upgrades stay inside the allowances in the scope summary. Any move to upper-mid finishes pushes this budget below range.
- Cut order if bids land high (client's own words): 1. Drop the screened porch to a covered deck. 2. Standard appliance package instead of the upgraded package. 3. Reduce the patio and landscaping scope.
- Financing path: construction loan.
- Lender and loan officer: community bank, Knoxville (name held in the client file). Pre-approval: letter on file, dated September 28, 2026, covering the \$610,000 total project.
- Proof of funds if cash: not applicable, loan financed. Clients confirmed the \$62,000 land purchase closes from savings, bank statement summary seen at the consult.
- Lender conditions affecting builder or schedule: standard draw inspections by the lender. Land must close before the construction loan converts. No unusual conditions noted.

Part 5 · Red Flags and Open Items

#	Flag or open item	Owner	Due	Status
1	Survey ordered October 8, 2026, not yet delivered. Builder site layout and final site work pricing wait on it	Client	Before land closing, late October 2026	Open
2	Finish allowances are tight against the construction budget (Part 4 note). Clients hold the cut order in Part 4 if bids land high	Client / Grandmark	At builder pricing	Noted, not blocking

No red flags from the Stage 1 screen or the walkthrough. 1 open item only.

Readiness call: READY WITH CONDITIONS (survey delivery, item 1).

Qualification summary: Relocating couple with both decision makers engaged, land under contract at \$62,000 with a passed 4-bedroom septic evaluation, and a documented construction loan pre-approval behind a \$610,000 total budget. The \$505,000 construction budget sits inside the current Knoxville custom range at the low end, so finishes are the pressure point and the clients have already named their cut order. The only open item is the pending survey, due before the land closing.

Part 6 · Gate Stamps

- ☒ Client Qualification Agreement signed · date: October 13, 2026
- ☒ Client Tranche 1 paid · \$2,475 · date: October 13, 2026 (flat fee band \$4,950, project band \$350,000 to \$750,000. Tranche 2 of \$2,475 due at builder contract signing, \$0 if no signing)
- ☒ Tri-Party Disclosure signed by client, builder, Grandmark · date: October 14, 2026



- ☒ Partner-Ready Brief released to: matched partner builder, large residential profile (builder name and license block as stated on the signed disclosure) · date: October 14, 2026

Deliverable A · Client Qualification Packet (cover summary, as sent to the client)

Readiness call: READY WITH CONDITIONS. Your project is qualified on budget, land, and financing. 1 condition rides with it: the survey ordered October 8, 2026 is due before your land closing, and your builder's final site work pricing waits on it.

Your next steps, in order:

1. Close on the lot (scheduled late October 2026) and send Grandmark the recorded deed copy.
2. Send Grandmark the survey the day it arrives.
3. Engage your architect or select a licensed plan set by December 2026 so builder pricing is final before a spring 2027 start.
4. Review the builder response when it lands (response due within 3 business days of the brief).

Fee status: client qualification fee \$4,950 for your band. Tranche 1 of \$2,475 paid October 13, 2026. Tranche 2 of \$2,475 is due only if a builder contract signs. If no contract signs, Tranche 2 is \$0.

This packet belongs to you and can be used with any builder.

Delivery log

Deliverable	To	Date	By
Client Qualification Packet	Daniel and Priya Nair	October 14, 2026	Email
Partner-Ready Brief	Matched partner builder (per signed disclosure)	October 14, 2026	Email
Lender transmittal	Not requested	n/a	n/a

Prepared by: Grandmark (packet build), October 12, 2026 · Approved by Ben Long: initials on file, October 13, 2026 · Filed against the client record in GRID / Airtable on: October 14, 2026

Deliverable B · Partner-Ready Project Brief (as sent to the builder)

READINESS CALL: READY WITH CONDITIONS (1 open item, survey pending, due before land closing late October 2026)

Project: Custom new home, Blount County, Knoxville pod. Packet GM-2026-014.

Clients: Daniel and Priya Nair, relocating from Ohio for work. Both are decision makers. Lead contact Daniel Nair, email preferred, weekly update cadence agreed.

Scope summary: 2,150 sq ft single-story custom home, 3 bed / 2.5 bath, plus a dedicated office. Mid finish level: painted cabinets, quartz counters in the kitchen, LVP through the main living areas, tile in both full



baths. Covered back deck. 2-car garage. Clients hold floor plan sketches only at this stage; an architect engagement or licensed plan purchase is scheduled by December 2026, before final pricing. Finish allowances are tight (see budget note) and the clients have pre-agreed a cut order: screened porch to covered deck first, standard appliance package second, reduced patio and landscaping third.

Site facts: 0.8 acre lot on a paved county road (fictional address on the signed disclosure). Moderate slope falling away from the road, flat buildable pad of roughly 0.4 acre. Public water at the road, tap fee unpaid. Septic: evaluation done September 2026, passed for a 4-bedroom system, report on file. Power at the road, no natural gas (electric and propane accepted). No HOA, standard county setbacks, no easements found on the contract plat. 14 site photos attached to this brief.

Budget and cost check: Total project budget \$610,000. Land \$62,000, under contract, closing late October 2026, purchase closing from client savings. Construction budget \$505,000. Site work allowance \$28,000 held outside the construction budget. Client contingency \$15,000. Grandmark cost check: \$505,000 on 2,150 sq ft equals \$235 per sq ft against the current \$225 to \$325 per sq ft Knoxville custom range. Inside range at the low end. Price the mid finish level as scoped; bring any finish-driven overage back against the client cut order above rather than absorbing it silently.

Financing evidence: Construction loan. Pre-approval letter on file, dated September 28, 2026, from a community bank in Knoxville, covering the \$610,000 total project. Lender runs standard draw inspections. Land closes before the loan converts.

Timeline: Target start spring 2027 (March to April). Target completion July 31, 2027, ahead of the 2027 school year. Flexibility plus or minus 60 days on start. The school year date is the hard edge on completion.

Red flags and open items: No red flags. 1 open item: boundary and topo survey ordered October 8, 2026, due before the land closing; final site layout and site work pricing wait on delivery. Grandmark forwards the survey to you the day it arrives.

Documents available on request: septic evaluation report (on file), lender pre-approval letter (on file), land purchase contract (on file), survey (pending, due late October 2026), site photos (attached, 14).

Response required within 3 business days of this brief: accept, pass, or name the specific missing information you need.

Grandmark fee line for this deal (restated from the signed Tri-Party Disclosure): on a \$505,000 construction contract, the Grandmark builder fee is \$12,575, calculated at 3% on the first \$250,000 (\$7,500), 2% on the next \$250,000 (\$5,000), and 1.5% on the remaining \$5,000 (\$75). Payable 50% at contract signing (\$6,287.50) and 50% at construction start or first draw (\$6,287.50). The client contracts directly with you. Grandmark does not perform, supervise, price, or warrant the construction.