

A contractor should be aware of potential liabilities, make effective use of valuable survey time, maintain accurate records and have a correct pricing structure all of which are fundamental to the running of a building preservation business. This Pack contains valuable information and guidance to help put this part of a building preservation company in order.

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### ***CGD 1A: Common Aspect of the Law:***

*Three page document briefly outlining certain aspects of the law that are encountered on a regular basis by the building restoration industry.*

### ***CGD 1B: Taking Survey Instructions:***

*Obtaining good information at the time of an enquiry is important for many reasons. Seventeen essential points that should be covered when taking survey instructions from a potential client together with the reasons why are contained in this document.*

### ***CGD 1C: Effective Record Keeping:***

*Any organisation offering long term guarantees should keep readily accessible accurate records. It should also be possible to rapidly cross reference all new enquires otherwise*

*expensive and embarrassing blunders could be made. This Guidance Document outlines an accurate easily retrievable manual record and reference system. It is simple and it works.*

**CGD 1D: Survey Enquiry Form:**

*An ergonomically designed single sheet enquiry form that incorporates all the information a surveyor should have available to enable the survey to be conducted efficiently and the report compiled correctly. The form also contains a brief costing facility. This form is intended to be printed/copied and used.*

**CGD 1D.1: Survey Enquiry Form Completed:**

*This is a completed example of the survey enquiry form CGD 1D to show how the survey enquiry information is displayed and the costing sections are used.*

**CGD 1E: □ Enquiry/Acceptance Analysis Notes:**

*To be efficient it is extremely important to monitor and analyse all enquiries. CGD 1E comprises of a set of five documents. The notes in this document explain how to use three of the forms that are part of the CGD 1E set. If used correctly the information obtained enables the likelihood of work transpiring from all enquiries to be categorised, the effectiveness of advertising and potential work sources to be monitored. Correct use of these forms will enable you to operate an effective and controlled selective survey charge policy should you wish.*

**CGD 1E.1: Enquiry/Acceptance Analysis Form:**

*This CGD is a blank form listing 18 possible sources of enquiry. Obviously the 18 sources used will not be applicable to everyone so they should therefore be changed to suit individual needs. The same form layout is used to plot survey enquiries (or reason for surveyor visits) and also to plot the source of enquiries that resulted in an acceptance.*

**CGD 1E.2: Enquiry/Acceptance Analysis Form: (Enquiries Example)**

*A partially completed example of the enquiry/acceptance analysis form (CGD 1E.1) on which fictitious figures for a first quarter's **enquiries** have been plotted.*

**CGD 1E.3: Enquiry/Acceptance Analysis Form: (Acceptance Example)**

*A partially completed example of the enquiry/acceptance analysis form (CGD 1E.1) on which fictitious figures for a first quarter's **acceptances** have been plotted.*

**CGD 1E.4: Enquiry Sector Analysis Form (Partially completed):**

*The Enquiry Sector Analysis Form is a slightly different layout to CGD 1E.1. This Guidance Document shows a partially completed example of each enquiry sector and for continuity makes use of the fictitious numbers entered on forms CGD 1E.2 & CGD 1E.3. By using these figures it is possible to calculate the percentage chance of being instructed to undertake work for each enquiry sector. This is the form that reveals the cost effectiveness of a company's survey time.*

**CGD 1E.5: Enquiry Sector Analysis Form:**

*A blank Enquiry Sector Analysis form for you to print/copy and use.*

**CGD 1F: Pricing structure:**

*How to arrive at the right price for a job is crucial for the success of any business. It is extremely important to have a pricing structure and this Guidance Document explains a simple way to formulate one. It also explains how to monitor the effectiveness of pricing, contract management and a cash flow forecast.*

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**To Purchase**

These Guidance Documents contain a wealth of information gained over many years that will

prove to be extremely useful to any building preservation company. The entire collection of Guidance Documents is available for purchase for the sum of £250.00. All of the Packs are supplied on CD in word format so that you will be able to adapt the documents for your own use. To purchase please complete the attached CGD Purchase Order Form. Please make certain that you include your name, address and telephone number with your order.

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