

In order to portray the right image and fulfil your obligations to a prospective client your report should contain certain basic fundamental documentation. If you are offering to provide a guarantee then it is only reasonable that you enclose a specimen with your report so the client is able to see what they will be getting. Guarantees and guarantee management is also an important part in a building preservation company. This pack contains all the basic items that should accompany a report and estimate as well as very informative information with regard to guarantees and guarantee management.

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### **CGD 5A: Health and Safety Information Data Sheet:**

*Health and safety information should be enclosed with every report that is specifying the use of timber or rising damp treatment products. Contractors have a duty to inform clients of precautions they should take before work commences on site - not when the operatives arrive. Basic health and safety precautions are outlined in this Data Sheet but these should be adapted as considered necessary and as dictated by the product manufacturer of the materials it is intended to use.*

### **CGD 5B: Health and Safety Warning Notice:**

*It is good practice as well as fulfilling your insurance obligations to prominently display a warning notice for the benefit of others before, during and after any treatment takes place. This document is a suggested format for a Health and Safety warning notice. You may wish to adapt*

*the notice so that it is relevant to the products that you are using. ( For 'Pack' grouping purposes this document is the same as CGD 6M)*

**CGD 5C: Notice of Acceptance:**

*This CGD is a blank formal Notice of Acceptance for you to enclose with each estimate that enables your client to formally accept your estimate together with your terms and conditions with the minimum of fuss or effort on their part.*

**CGD 5C.1: Notice of Acceptance - Completed Example**

*This is an example of a Notice of Acceptance (CGD 5C) that has been completed as if by a potential client.*

**CGD 5D: Contractors own Guarantee Guidance Notes:**

*These notes explain in general terms about a contractors own guarantee and more specifically about the suggested wording for a guarantee contained in CGD 5D.1. It also points out that it is the contractor who decides what will and will not be guaranteed and when it is perhaps best to walk away.*

**CGD 5D.1: A Suggested Contractor's Own Guarantee:**

*This Guidance Document is a suggested lay out and content for a contractor's own guarantee. Prior to using this guarantee you should first of all satisfy yourself that it fully meets all of your requirements.*

**CGD 5D.2: Guarantee Claim Letter:**

*If a company is in the business of issuing long term guarantees then it is inevitable that it will be called upon to investigate a potential guarantee claim occasionally. It is therefore important to have a procedure in place for dealing with this type of situation when it arises. It should always be remembered that it is how a guarantee claim situation is handled that will have a significant influence upon the type of reputation a company gains. This guidance note outlines a polite informative letter that should be sent out upon receipt of a guarantee claim.*

**CGD 5D.3: Guarantee Claim Form:**

*This is a guarantee claim form that should accompany the guarantee claim letter CGD 5D.2. The guarantee claimant is required to complete the form that covers the basic points to enable a guarantee claim to be serviced.*

**CGD 5D.4: Client Guarantee Claim Information:**

*In most circumstances the person making a guarantee claim is not an expert in damp or timber related problems and sometimes a simple explanation is all that is required to put a clients mind at rest. This Guidance Document contains information to help a client evaluate their problem and decide whether or not they have a valid guarantee claim. This information sheet should accompany a guarantee claim letter and form CGD 5D.2 & CGD 5D.3.*

**CGD 5E: Terms and Conditions:**

*Whilst it is acknowledged that not all terms and conditions are enforceable it is important that any contract is based on certain basic criteria for the benefit of all concerned. It is also important that conditions of contract are not seen to be overwhelming to the extent that they act as a deterrent. This sheet contains sixteen reasonable Terms and Conditions which it is suggested are printed on the reverse side of a formal estimate.*

**CGD 5F: Environmental Policy Statement:**

*This is a single sheet document to enclose with your report that lays down a suggested environmental policy that your company may wish abide by. Minimising the impact your company's activities have upon the environment is always worthwhile and it is sometimes very useful to have a company policy available for use when tendering for contracts.*

## 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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