

What I need from you

Commercial Management

This list explains what I need for this service, why I need it and where you can usually find it. Send the information together where practical. Tell me straight away about anything unavailable or urgent. I will confirm when the essential information is complete and the delivery date is fixed.

Essential items are needed before the relevant work can proceed. Important items affect what I can conclude; optional items add useful context. If an item is missing, incomplete, unreadable or a different version from one already sent, identify it by its number and explain what you hold. I will tell you what replacement is needed, why it matters and any effect on the agreed work or date.

1. Contract and quote ESSENTIAL

Why I need it. The mechanics everything runs on.

Where you'll find it. Your own records; the builder's office can resend anything missing.

Without it. There is nothing the monthly reporting can be checked against, so every figure in it is a guess dressed as a position.

2. Budget and funding IMPORTANT

Why I need it. The baseline the monthly position reports against.

Where you'll find it. Your own figures: the budget or cost plan as you have it, and your mortgage or self-build funding offer for the facts behind it.

Without it. The monthly report has no baseline to measure against and no funding picture to warn you if the money looks like running out before the work is done.

3. History to date IMPORTANT

Why I need it. The account starts true.

Where you'll find it. Bank statements, emails and texts hold most of it.

Without it. The account starts from zero instead of from where the build actually is, and everything already spent or agreed stays invisible to it.

4. The photo habit ESSENTIAL

Why I need it. The valuation's eyes.

Where you'll find it. Your own phone, on the walk before each request is due; the routine starts once we agree it, nothing more is needed.

Without it. There is no independent record between visits, so a payment request cannot be checked against what has actually been built.

5. Same-day forwarding ESSENTIAL

Why I need it. The whole service's clock.

Where you'll find it. Your inbox, the moment anything with a number on it lands.

Without it. Decisions get made and money gets committed before the retainer ever sees them.

6. How the build is run, and the works type ESSENTIAL

Why I need it. The route decides how many accounts run in parallel, what quotes and valuations are levelled onto, and which contract a change belongs in.

Where you'll find it. You know this already and it takes two minutes: who holds the contracts, one builder for the whole job or trades engaged separately or a kit company plus trades; who designed it; and whether anyone is administering the contract or certifying payments. Say if it has changed since you started

Without it. The retainer cannot be scoped or priced, because the route decides how much of every service there is

How to send it

Everything to contact@jackbutlerkettle.com. Original files rather than scans of printouts wherever you have them, and forwarded emails rather than text copied out of them, because the dates and the addressees travel with the original and they often turn out to matter.