

# What I need from you

## Retention Tracking

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. Contracts showing retention percentage, release triggers and the full payment clause

#### ESSENTIAL

**Why I need it.** The percentage, what releases it, the payment cycle every release has to be applied for in, and the due date, payment notice period and final date for payment that run from an application.

**Where you'll find it.** The commercial folder for live jobs; the archive for the ones everyone has stopped thinking about.

**Without it.** There is no percentage, no trigger to register against, no application date to count an alert back from and no payment dates to diarise once a release is applied for: nothing about retention can be tracked at all

### 2. Practical completion dates and certificates

#### IMPORTANT

**Why I need it.** The first release trigger on most contracts.

**Where you'll find it.** The contract administrator's letters, usually filed with the job's formal correspondence.

**Without it.** The first release date on that contract is only ever an estimate, not one you can rely on to actually claim the money back

### 3. Defects periods, and any certificate ending them

#### IMPORTANT

**Why I need it.** The second.

**Where you'll find it.** The contract administrator's letters, usually filed with the job's formal correspondence.

**Without it.** The second release date on that contract stays provisional, taken from the printed form rather than confirmed against what you actually signed

**4. Every certificate issued on each contract** ESSENTIAL

**Why I need it.** What proves the trigger has been met, and what proves the deduction.

**Where you'll find it.** The payment folders, job by job.

**Without it.** There is nothing to prove what has actually been deducted, so an over-deduction running quietly for years never gets caught

**How to send it**

Everything to [contact@jackbutlerkettle.com](mailto: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.