

Electrical buyer checklist

Use this two-page checklist before progressing an offer. On this page record the document requested, what you inspected and the question left open. Add reviewer and action details on the next page. There is no pass score.

Business and review date

Document requested	Inspected result	Unresolved question
Agreements and income schedule		
People and competence records		
Scheme and issuer correspondence		
Quote to receipt job file		
Cash and job balance schedules		
Accounts and profit bridge		

Additional document requested, result and question

Type your answers in and save a copy, or print the page and fill it in by hand. Nothing you enter is sent to us.

Electrical buyer checklist: reviewers and actions

Use the same business and review date as the first page. Name the person reviewing each open question and the next action. Decide which missing evidence must be resolved before you progress an offer.

Business and review date

Check	Responsible reviewer	Next action and date
Agreements and income		
People and competence		
Scheme continuity		
Quote to receipt		
Cash and job balances		
Profit bridge		

Evidence required before progressing an offer, and why

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