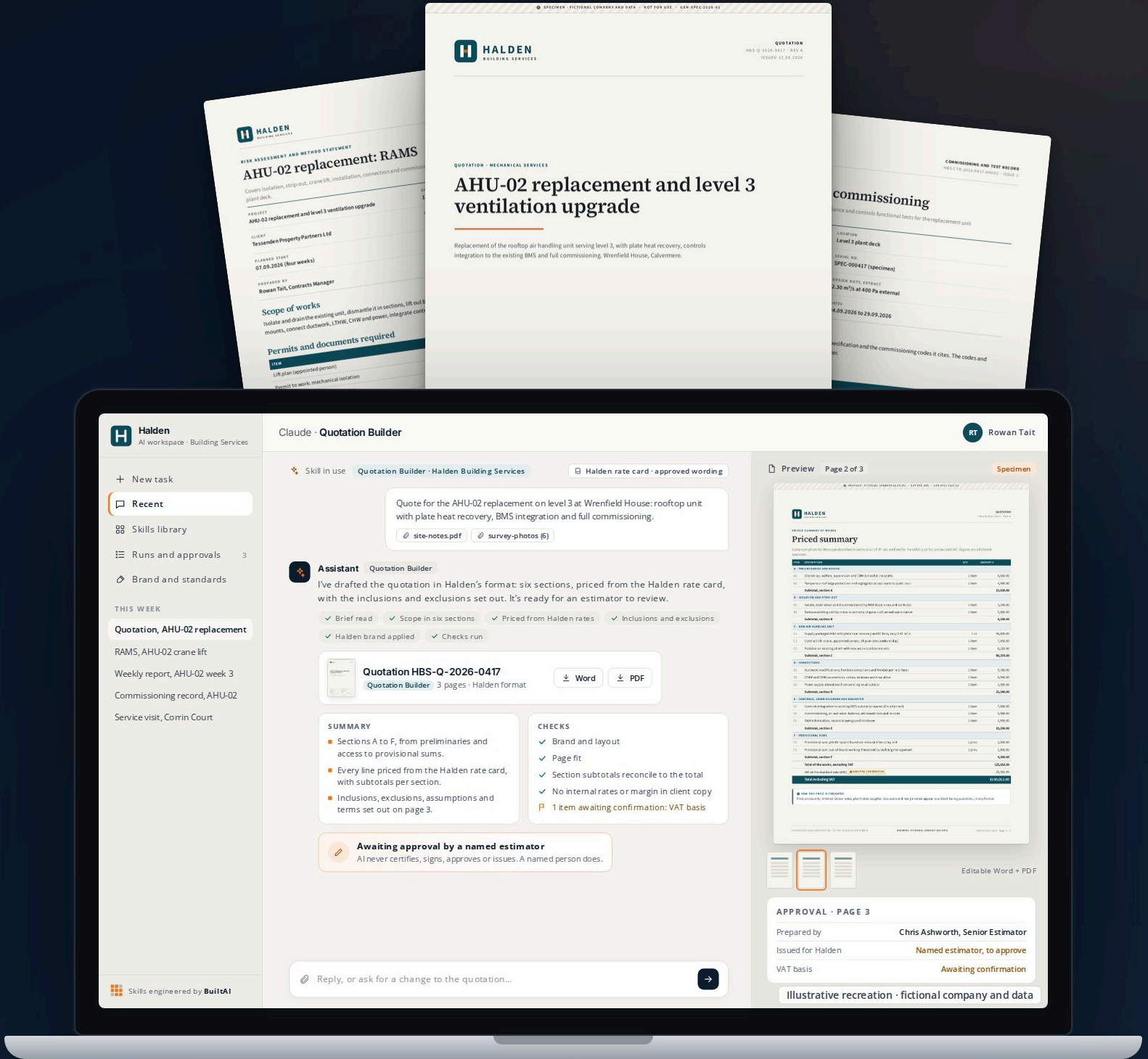


■ AI SKILLS, BUILT TO ORDER FOR YOUR BUSINESS

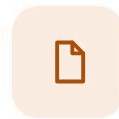
# Add capacity. Not headcount.

What would you do with more hours in the week? Bespoke AI skills draft and check your documents. Your people sign.



# Paperwork that works for you. **Not the other way round.**

Today, in most contracting and FM businesses, it is the other way round.



## Every job runs on paperwork

Quotations, tender returns, RAMS, commissioning records, progress reports, applications for payment, service reports and O&M packs. Each one matters, and each one is assembled by hand.



## Senior time goes on assembly

Estimators, engineers and managers spend hours copying, reformatting and checking instead of pricing, advising and winning work. When the team is full, the next tender waits.



## Inconsistency creeps in

Out-of-date files, re-typed figures and wording that drifts between authors. Small errors in a certificate, a rate or a clause are the expensive ones.



**What would your business do with more capacity?** BuiltAI skills take the assembly and the checking off your team's desk, so the same team has room for more tenders, more jobs and the work that wins. Your people keep the judgement, and the signature.

# Same team. More work out of the door.

An illustrative day at a fictional contractor, on specimen documents. Each one starts as a checked draft and ends with a person’s signature.

07:45

The quote is priced.

Yesterday's site notes become a priced quotation, from your own rates and in your brand. The estimator checks it, sends it and moves on to the next tender.

Specimen

CLIENT

Tessenden Property Partners Ltd

ATTENTION

Alex Samuels, Facilities Manager

QUOTATION TOTAL

£125,010.00 excl. VAT

09:30

Saturday's lift is planned.

Task-specific RAMS for the crane lift, with anything unconfirmed flagged. The competent person reviews and signs.

Specimen

SITE

12 Tollgate Street, Calvermere ZZ1 9XY

PRINCIPAL CONTRACTOR

Halden, as principal contractor

CRANE LIFT

Saturday 12.09.2026, 07:00 to 13:00

11:30

The record is set out.

The commissioning record carries the design duty and the named engineer. The engineer enters the readings, verifies and signs. Software signs nothing.

Specimen

UNIT

Packaged AHU, plate heat recovery, EC fans (specimen)

DESIGN DUTY, SUPPLY

2.40 m³/s at 450 Pa external

COMMISSIONED BY

Jamie Sorensen, Commissioning Engineer

13:30

The visit is written up.

Service notes and readings become a client-ready visit report, with the defect found ready to quote while the engineer heads to the next site.

Specimen

TASKS SCHEDULED

7

5 COMPLETE

DEFECTS FOUND

1

QUOTE TO FOLLOW

15:00

The week is reported.

Progress and safety, in the same format as last week, ready for the contracts manager to check, not to write.

Specimen

OVERALL COMPLETE

78%

PLANNED 75%

SAFETY

0 incidents

NO RIDDOR

16:30

The application is ready to sign.

The valuation reconciles to the contract sum and agreed variations, and open contract terms are listed. A named commercial manager signs.

Specimen

SUBMITTED FOR HALDEN

Signed by: named commercial manager

NAME

SIGNATURE

DATE

— Every document drafted and checked. Every one signed by your people. The same team, with room for more.

■ WHAT A SKILL IS

# Packaged expertise that produces one document, properly, every time.

A skill is a set of instructions, rules, rates and approved wording that Claude follows to produce one specific document to a fixed standard. It is not a chatbot answer. It is your document, laid out, calculated and checked.

- One skill per document type, built around how your business already works
- Your rates, standards, clauses and approved wording, held once
- Your brand on every page, chosen and locked before anything is built

| General AI chat                 | ✓ A BuiltAI skill                  |
|---------------------------------|------------------------------------|
| × Different answer each time    | ✓ The same standard every time     |
| × Generic look and wording      | ✓ Your brand, your wording         |
| × Guesses when unsure           | ✓ Flags what it cannot confirm     |
| × You still format the document | ✓ A finished file, ready to review |

■ HOW A SKILL WORKS

# From a job description to a checked draft.

Describe the job in plain English, or answer a short guided intake. The skill drafts the document, the checks run, and a named person decides.

Halden

AI workspace · Building Services

+ New task

Recent

Skills library

Runs and approvals3

Brand and standards

THIS WEEK

Quotation, AHU-02 replacement

RAMS, AHU-02 crane lift

Weekly report, AHU-02 week 3

Commissioning record, AHU-02

Service visit, Corrin Court

Skills engineered by BuiltAI

Claude · Quotation Builder

Skill in use

Quotation Builder · Halden Building Services

Halden rate card · approved wording

1

Quote for the AHU-02 replacement on level 3 at Wrenfield House: rooftop unit with plate heat recovery, BMS integration and full commissioning.

site-notes.pdf survey-photos (6)

Assistant

Quotation Builder

I've drafted the quotation in Halden's format: six sections, priced from the Halden rate card, with the inclusions and exclusions set out. It's ready for an estimator to review.

✓ Brief read

✓ Scope in six sections

✓ Priced from Halden rates

✓ Inclusions and exclusions

✓ Halden brand applied

✓ Checks run

2

Quotation HBS-Q-2026-0417

Quotation Builder3 pages · Halden format

WordPDF

SUMMARY

Sections A to F, from preliminaries and access to provisional sums.

Every line priced from the Halden rate card, with subtotals per section.

Inclusions, exclusions, assumptions and terms set out on page 3.

CHECKS

✓ Brand and layout

✓ Page fit

✓ Section subtotals reconcile to the total

✓ No internal rates or margin in client copy

1 item awaiting confirmation: VAT basis

4

Awaiting approval by a named estimator

AI never certifies, signs, approves or issues. A named person does.

Reply, or ask for a change to the quotation...

Preview

Page 2 of 3

Specimen

PRICED SUMMARY OF WORKS

Halden

Quotation

Summary of works

Prices are fixed for the validity period and exclude VAT. Figures are a fictional recreation.

| ITEM                                                      | DESCRIPTION                                                                    | QTY    | UNIT PRICE |
|-----------------------------------------------------------|--------------------------------------------------------------------------------|--------|------------|
| <strong>A - PRELIMINARIES AND ACCESS</strong>             |                                                                                |        |            |
| A1                                                        | Site set-up, safety, supervision and CME duties for the works                  | 1 item | 4,000.00   |
| A2                                                        | Temporary road and pedestrian access and segregated access route to plant dock | 1 item | 1,000.00   |
| <strong>Subtotal, section A</strong>                      |                                                                                |        |            |
| 15,000.00                                                 |                                                                                |        |            |
| <strong>B - ISOLATION AND STRIP-OUT</strong>              |                                                                                |        |            |
| B1                                                        | Isolate, drain down and disconnect existing AHU-02 (services and controls)     | 1 item | 1,240.00   |
| B2                                                        | Remove existing unit by crane to sections, dispose via licensed waste center   | 1 item | 5,860.00   |
| <strong>Subtotal, section B</strong>                      |                                                                                |        |            |
| 7,100.00                                                  |                                                                                |        |            |
| <strong>C - NEW AND EXISTING UNIT</strong>                |                                                                                |        |            |
| C1                                                        | Supply and install AHU with plate heat recovery and 10 bar, duty 5.4m³/s       | 1 no   | 46,400.00  |
| C2                                                        | Contract lift, crane, appointed person, lift plan (one weekend day)            | 1 item | 1,400.00   |
| C3                                                        | Position on existing strength with new anti-vibration mounts                   | 1 item | 6,120.00   |
| <strong>Subtotal, section C</strong>                      |                                                                                |        |            |
| 53,920.00                                                 |                                                                                |        |            |
| <strong>D - CONNECTIONS</strong>                          |                                                                                |        |            |
| D1                                                        | Ductwork modification, flexible connections and fire damper interfaces         | 1 item | 6,780.00   |
| D2                                                        | CFRPP and CME connections, valves, strainers and insulation                    | 1 item | 6,240.00   |
| D3                                                        | Power supply alterations from existing local supply                            | 1 item | 3,560.00   |
| <strong>Subtotal, section D</strong>                      |                                                                                |        |            |
| 16,580.00                                                 |                                                                                |        |            |
| <strong>E - CONTROLS, COMMISSIONING AND HANDOVER</strong> |                                                                                |        |            |
| E1                                                        | Controls integration to existing BMS (location points not attached)            | 1 item | 1,500.00   |
| E2                                                        | Commissioning, air and water balance, whored water records                     | 1 item | 5,400.00   |
| E3                                                        | Operational information, record drawings and handover                          | 1 item | 1,950.00   |
| <strong>Subtotal, section E</strong>                      |                                                                                |        |            |
| 8,850.00                                                  |                                                                                |        |            |
| <strong>F - PROVISIONAL SUMS</strong>                     |                                                                                |        |            |
| F1                                                        | Provisional sum: plate heat recovery on removal of existing unit               | 1 item | 1,500.00   |
| F2                                                        | Provisional sum: cost of hours working if required by building management      | 1 item | 1,500.00   |
| <strong>Subtotal, section F</strong>                      |                                                                                |        |            |
| 3,000.00                                                  |                                                                                |        |            |
| <strong>Total of the works, excluding VAT</strong>        |                                                                                |        |            |
| 136,800.00                                                |                                                                                |        |            |
| <strong>VAT at the standard rate (20%)</strong>           |                                                                                |        |            |
| 27,360.00                                                 |                                                                                |        |            |
| <strong>Total including VAT</strong>                      |                                                                                |        |            |
| 164,160.00                                                |                                                                                |        |            |

NEW FIRM PRICE IS PRESENTED

Final preliminary, internal labour rates, plant rates, supplier discounts and margin never appear in a client facing quotation, in any format.

APPROVAL · PAGE 3

Prepared by

Chris Ashworth, Senior Estimator

Issued for Halden

Named estimator, to approve

VAT basis

Awaiting confirmation

Illustrative recreation · fictional company and data

1 Describe the job.

Plain English, with your site notes and photos attached.

Quote for the AHU-02 replacement on level 3 at Wrenfield House: rooftop unit with plate heat recovery, BMS integration and full commissioning.

site-notes.pdf

survey-photos (6)

2 The skill drafts it.

Your brand, an editable Word file and a print-ready PDF.

Quotation HBS-Q-2026-0417

Quotation Builder3 pages · Halden format

Word

PDF

3 Automatic checks run.

Brand, page fit, totals, internal costs; VAT basis flagged.

- ✓ Brand and layout
- ✓ Page fit
- ✓ Section subtotals reconcile to the total
- ✓ No internal rates or margin in client copy
- ✗ 1 item awaiting confirmation: VAT basis

4 A named person approves.

A named estimator reviews, edits if needed and issues it.

Awaiting approval by a named estimator

AI never certifies, signs, approves or issues. A named person does.

BuiltAI

BUILT AI SKILLS

05

# One suite, from first enquiry to handover and beyond.

Typical operating families across building services, FM, fit-out and specialist contracting. Your own catalogue is shaped around the documents your business actually produces.



01 · WIN THE WORK

### Estimating and Tenders

- Quotation Builder
- Tender Scope of Works
- Tender Return and Compliance Matrix



01 · WIN THE WORK

### Design and Technical

- Site Survey Report
- Technical Specification
- RFI and Technical Query Register



02 · SAFE AND COMPLIANT

### Health and Safety (RAMS)

- RAMS Generator
- Method Statement
- Site Induction Pack



02 · SAFE AND COMPLIANT

### Testing, Commissioning and Compliance

- Compliance Calendar and Certificate Tracker
- Inspection and Test Report
- Commissioning Record Pack



03 · DELIVER AND GET PAID

### Project Delivery and Site

- Mobilisation Plan
- Project Programme
- Weekly Progress Report



03 · DELIVER AND GET PAID

### Commercial and Accounts

- Supplier and Subcontractor Quote Comparison
- Variation Notice
- Application for Payment



04 · HAND OVER AND KEEP IT RUNNING

### O&M and Handover

- Handover Pack Assembler
- Handover Document Index
- Asset Register Builder



04 · HAND OVER AND KEEP IT RUNNING

### Maintenance and Service Delivery

- Job and Work-Order Intake
- PPM Schedule
- Service and Call-Out Report



04 · HAND OVER AND KEEP IT RUNNING

### Client Reporting and Governance

- SLA and KPI Report
- Client Review Meeting Brief
- New Contract Onboarding Pack

- Word · Excel · PDF, and HTML where it helps
- Your brand on every page
- A named approver for every document
- Examples, not a fixed menu

# 01

## CHAPTER 01

# Win the work

More tenders answered with the same team, so your estimators spend their time on price and risk.

- Quotations and priced proposals
- Tender returns and compliance matrices
- Specifications and technical queries

01 SPECIMEN - FICTIONAL COMPANY AND DATA - NOT FOR USE - GEN-SPEC-2026-01

QUOTATION  
HBS-Q-2026-0417 - REV A

**HALDEN**  
BUILDING SERVICES

PRICED SUMMARY OF WORKS

### Priced summary

Lump-sum prices for the scope described in sections A to F. Prices are fixed for the validity period and exclude VAT. Figures are a fictional specimen.

| ITEM                                            | DESCRIPTION                                                                   | QTY    | AMOUNT £           |
|-------------------------------------------------|-------------------------------------------------------------------------------|--------|--------------------|
| <b>A - PRELIMINARIES AND ACCESS</b>             |                                                                               |        |                    |
|                                                 |                                                                               | 1 item | 8,650.00           |
| A1                                              | Site set-up, welfare, supervision and CDM duties for the works                | 1 item | 4,980.00           |
| A2                                              | Temporary roof edge protection and segregated access route to plant deck      |        | <b>13,630.00</b>   |
| <b>Subtotal, section A</b>                      |                                                                               |        |                    |
| <b>B - ISOLATION AND STRIP-OUT</b>              |                                                                               |        |                    |
| B1                                              | Isolate, drain down and disconnect existing AHU-02 (services and controls)    | 1 item | 3,240.00           |
| B2                                              | Remove existing unit by crane in sections; dispose via licensed waste carrier | 1 item | 5,860.00           |
| <b>Subtotal, section B</b>                      |                                                                               |        |                    |
| <b>C - NEW AIR HANDLING UNIT</b>                |                                                                               |        |                    |
|                                                 |                                                                               | 1 nr   | 46,800.00          |
| C1                                              | Supply packaged AHU with plate heat recovery and EC fans, duty 2.40 m³/s      | 1 item | 7,450.00           |
| C2                                              | Contract lift: crane, appointed person, lift plan (one weekend day)           | 1 item | 6,120.00           |
| C3                                              | Position on existing plinth with new anti-vibration mounts                    |        | <b>60,370.00</b>   |
| <b>Subtotal, section C</b>                      |                                                                               |        |                    |
| <b>D - CONNECTIONS</b>                          |                                                                               |        |                    |
|                                                 |                                                                               | 1 item | 9,780.00           |
| D1                                              | Ductwork modifications, flexible connections and fire damper interfaces       | 1 item | 8,940.00           |
| D2                                              | LTHW and CHW connections, valves, strainers and insulation                    | 1 item | 3,560.00           |
| D3                                              | Power supply alterations from existing local isolator                         |        | <b>22,280.00</b>   |
| <b>Subtotal, section D</b>                      |                                                                               |        |                    |
| <b>E - CONTROLS, COMMISSIONING AND HANDOVER</b> |                                                                               |        |                    |
|                                                 |                                                                               | 1 item | 7,900.00           |
| E1                                              | Controls integration to existing BMS outstation (points list attached)        | 1 item | 5,480.00           |
| E2                                              | Commissioning, air and water balance, witnessed tests and records             | 1 item | 1,950.00           |
| E3                                              | O&M information, record drawings and handover                                 |        | <b>15,330.00</b>   |
| <b>Subtotal, section E</b>                      |                                                                               |        |                    |
| <b>F - PROVISIONAL SUMS</b>                     |                                                                               |        |                    |
|                                                 |                                                                               | 1 prov | 2,500.00           |
| F1                                              | Provisional sum: plinth repairs found on removal of existing unit             | 1 prov | 1,800.00           |
| F2                                              | Provisional sum: out-of-hours working if required by building management      |        | <b>4,300.00</b>    |
| <b>Subtotal, section F</b>                      |                                                                               |        |                    |
| <b>Total of the works, excluding VAT</b>        |                                                                               |        |                    |
|                                                 |                                                                               |        | 25,002.00          |
| <b>VAT at the standard rate (20%)</b>           |                                                                               |        |                    |
|                                                 |                                                                               |        | <b>£150,012.00</b> |
| <b>Total including VAT</b>                      |                                                                               |        |                    |

**1 HOW THIS PRICE IS PRESENTED**  
Final prices only. Internal labour rates, plant rates, supplier discounts and margin never appear in a client-facing quotation, in any format.

HALDEN BUILDING SERVICES LTD - CO. NO. 000000000 (SPECIMEN)      SPECIMEN - FICTIONAL COMPANY AND DATA      HBS-Q-2026-0417 - Page 2 / 3

— Specimen quotation: fictional company and data.

# A priced quotation from your own rates.

Site notes, a schedule or an enquiry become a quotation with a clear scope, inclusions, exclusions and validity, in your brand, ready for your estimator to check.

Specimen: fictional company and data.

Specimen • Quotation, page 2 of 3

1

2

3

| SPECIMEN - FICTIONAL COMPANY AND DATA - NOT FOR USE - GEN-SPEC-2026-01                                                                                  |                                                                               |                                      |             |
|---------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|--------------------------------------|-------------|
| H HALDEN<br>BUILDING SERVICES                                                                                                                           |                                                                               | QUOTATION<br>HBS-Q-2026-0417 - REV A |             |
| PRICED SUMMARY OF WORKS                                                                                                                                 |                                                                               |                                      |             |
| Priced summary                                                                                                                                          |                                                                               |                                      |             |
| Lump-sum prices for the scope described in sections A to F. Prices are fixed for the validity period and exclude VAT. Figures are a fictional specimen. |                                                                               |                                      |             |
| ITEM                                                                                                                                                    | DESCRIPTION                                                                   | QTY                                  | AMOUNT £    |
| A - PRELIMINARIES AND ACCESS                                                                                                                            |                                                                               |                                      |             |
| A1                                                                                                                                                      | Site set-up, welfare, supervision and CDM duties for the works                | 1 item                               | 8,650.00    |
| A2                                                                                                                                                      | Temporary roof edge protection and segregated access route to plant deck      | 1 item                               | 4,980.00    |
| Subtotal, section A                                                                                                                                     |                                                                               |                                      | 13,630.00   |
| B - ISOLATION AND STRIP-OUT                                                                                                                             |                                                                               |                                      |             |
| B1                                                                                                                                                      | Isolate, drain down and disconnect existing AHU-02 (services and controls)    | 1 item                               | 3,240.00    |
| B2                                                                                                                                                      | Remove existing unit by crane in sections; dispose via licensed waste carrier | 1 item                               | 5,860.00    |
| Subtotal, section B                                                                                                                                     |                                                                               |                                      | 9,100.00    |
| C - NEW AIR HANDLING UNIT                                                                                                                               |                                                                               |                                      |             |
| C1                                                                                                                                                      | Supply packaged AHU with plate heat recovery and EC fans, duty 2.40 m³/s      | 1 nr                                 | 46,800.00   |
| C2                                                                                                                                                      | Contract lift: crane, appointed person, lift plan (one weekend day)           | 1 item                               | 7,450.00    |
| C3                                                                                                                                                      | Position on existing plinth with new anti-vibration mounts                    | 1 item                               | 6,120.00    |
| Subtotal, section C                                                                                                                                     |                                                                               |                                      | 60,370.00   |
| D - CONNECTIONS                                                                                                                                         |                                                                               |                                      |             |
| D1                                                                                                                                                      | Ductwork modifications, flexible connections and fire damper interfaces       | 1 item                               | 9,780.00    |
| D2                                                                                                                                                      | LTHW and CHW connections, valves, strainers and insulation                    | 1 item                               | 8,940.00    |
| D3                                                                                                                                                      | Power supply alterations from existing local isolator                         | 1 item                               | 3,560.00    |
| Subtotal, section D                                                                                                                                     |                                                                               |                                      | 22,280.00   |
| E - CONTROLS, COMMISSIONING AND HANDOVER                                                                                                                |                                                                               |                                      |             |
| E1                                                                                                                                                      | Controls integration to existing BMS outstation (points list attached)        | 1 item                               | 7,900.00    |
| E2                                                                                                                                                      | Commissioning, air and water balance, witnessed tests and records             | 1 item                               | 5,480.00    |
| E3                                                                                                                                                      | O&M information, record drawings and handover                                 | 1 item                               | 1,950.00    |
| Subtotal, section E                                                                                                                                     |                                                                               |                                      | 15,330.00   |
| F - PROVISIONAL SUMS                                                                                                                                    |                                                                               |                                      |             |
| F1                                                                                                                                                      | Provisional sum: plinth repairs found on removal of existing unit             | 1 prov                               | 2,500.00    |
| F2                                                                                                                                                      | Provisional sum: out-of-hours working if required by building management      | 1 prov                               | 1,800.00    |
| Subtotal, section F                                                                                                                                     |                                                                               |                                      | 4,300.00    |
| Total of the works, excluding VAT                                                                                                                       |                                                                               |                                      | 125,010.00  |
| VAT at the standard rate (20%)                                                                                                                          |                                                                               |                                      | 25,002.00   |
| Total including VAT                                                                                                                                     |                                                                               |                                      | £150,012.00 |
| HOW THIS PRICE IS PRESENTED                                                                                                                             |                                                                               |                                      |             |
| Final prices only. Internal labour rates, plant rates, supplier discounts and margin never appear in a client-facing quotation, in any format.          |                                                                               |                                      |             |
| HALDEN BUILDING SERVICES LTD - CO. NO. 00000000 (SPECIMEN) SPECIMEN - FICTIONAL COMPANY AND DATA HBS-Q-2026-0417 - Page 2 / 3                           |                                                                               |                                      |             |

## 1 Priced line by line.

Every item priced from your own rate data, grouped by section with subtotals that add up.

### A - PRELIMINARIES AND ACCESS

|                     |                                                                          |        |           |
|---------------------|--------------------------------------------------------------------------|--------|-----------|
| A1                  | Site set-up, welfare, supervision and CDM duties for the works           | 1 item | 8,650.00  |
| A2                  | Temporary roof edge protection and segregated access route to plant deck | 1 item | 4,980.00  |
| Subtotal, section A |                                                                          |        | 13,630.00 |

## 2 Flagged, never guessed.

The VAT basis prints as awaiting confirmation until a person confirms it.

|                                   |            |
|-----------------------------------|------------|
| Total of the works, excluding VAT | 125,010.00 |
| VAT at the standard rate (20%)    | 25,002.00  |

## 3 Internal costs stay internal.

Final prices only. Labour rates, plant rates, discounts and margin are kept out of the client copy, and a check looks for them before anyone sees it.

### HOW THIS PRICE IS PRESENTED

Final prices only. Internal labour rates, plant rates, supplier discounts and margin never appear in a client-facing quotation, in any format.

# Every requirement answered, or declared.

The tender return letter and a compliance matrix built as the tender is answered: each requirement, your response, the evidence and its owner, with open items declared as clarifications.

H

Halden

AI workspace · Building Services

+ New task

Recent

Skills library

Runs and approvals3

Brand and standards

THIS WEEK

Tender return, Learning Centre

Quotation, AHU-02 replacement

RAMS, AHU-02 crane lift

Weekly report, AHU-02 week 3

Claude · Tender Return and Compliance Matrix

RTRowan Tait

XLSX

Corvesham Learning Centre, phase 2: M&E services package · Compliance matrix

Tender return HBS-T-2026-0213 · cover letter (Word) and matrix (Excel) · Halden Building Services

C3

fx

Yes. Outline plan enclosed; full plan issued before start.

11 compliant2 clarifications1 awaiting

|    | A   | B                                                               | C                                                                       | D                          | E                     | F             |
|----|-----|-----------------------------------------------------------------|-------------------------------------------------------------------------|----------------------------|-----------------------|---------------|
| 1  | REF | REQUIREMENT                                                     | OUR RESPONSE                                                            | EVIDENCE                   | OWNER                 | STATUS        |
| 2  | 1.1 | Construction phase plan before start on site                    | Yes. Outline plan enclosed; full plan issued before start.              | App B · CPP outline        | Contracts Manager     | Compliant     |
| 3  | 1.2 | RAMS for each activity, issued before the activity starts       | Yes. Task-specific RAMS, approved by our competent person.              | App C · RAMS register      | H&S Manager           | Compliant     |
| 4  | 1.3 | Named site manager with a current site management qualification | Yes. Named site manager for the full programme.                         | App D · CV and certificate | Contracts Manager     | Compliant     |
| 5  | 2.1 | LTHW and CHW systems to the employer's requirements             | Yes. Design basis set out against each requirement.                     | App E · Design basis note  | Design Engineer       | Compliant     |
| 6  | 2.2 | Presence-detection lighting in teaching areas                   | Yes. Lighting and controls schedule enclosed.                           | App F · Lighting schedule  | Electrical Lead       | Compliant     |
| 7  | 2.3 | Sub-metering for each floor                                     | Yes. Metering schematic enclosed.                                       | App G · Metering schematic | Electrical Lead       | Compliant     |
| 8  | 2.4 | BMS integration with the existing head end                      | Head-end protocol to be confirmed. Allowance made for an open protocol. | Clarification CL-01        | Controls Engineer     | Clarification |
| 9  | 3.1 | Seasonal commissioning in the first year                        | One seasonal visit included; a second visit offered as an option.       | Clarification CL-02        | Commissioning Manager | Clarification |
| 10 | 3.2 | Commissioning to the specified codes, with witnessed tests      | Yes. Commissioning method and test records per system.                  | App H · Commissioning plan | Commissioning Manager | Compliant     |
| 11 | 3.3 | O&M manuals and record drawings at completion                   | Yes. Handover index enclosed; pack issued at completion.                | App J · Handover index     | Project Manager       | Compliant     |
| 12 | 4.1 | Programme to suit possession dates                              | Yes. Programme enclosed, with key dates and hold points.                | App K · Programme          | Project Manager       | Compliant     |
| 13 | 4.2 | Noisy works outside teaching hours in term time                 | Yes. Noisy activities sequenced outside teaching hours.                 | App L · Method extract     | Site Manager          | Compliant     |
| 14 | 5.1 | Professional indemnity insurance at the stated level            | Certificate requested from our broker.                                  | To follow                  | Commercial Manager    | Awaiting      |
| 15 | 5.2 | Social value commitments, including local apprenticeships       | Yes. Commitments and reporting set out.                                 | App M · Social value       | Bid Manager           | Compliant     |

Matrix

Clarifications

Evidence index

Cover letter

✓ Answered or declared

✓ Evidence on compliant lines

✓ Owner on every line

Awaiting approval by the named bid manager. Open items are declared as clarifications.

Illustrative recreation · fictional company and data

1 Requirement by requirement.  
Each requirement mapped to your response.

| REQUIREMENT                                                     | OUR RESPONSE                                               |
|-----------------------------------------------------------------|------------------------------------------------------------|
| Construction phase plan before start on site                    | Yes. Outline plan enclosed; full plan issued before start. |
| RAMS for each activity, issued before the activity starts       | Yes. Task-specific RAMS, approved by our competent person. |
| Named site manager with a current site management qualification | Yes. Named site manager for the full programme.            |

2 An owner for every answer.  
Who supplies it and where it stands.

| OWNER             | STATUS    |
|-------------------|-----------|
| Contracts Manager | Compliant |
| H&S Manager       | Compliant |
| Contracts Manager | Compliant |
| Design Engineer   | Compliant |

3 Open items, declared.  
Anything not yet confirmed goes into the return as a clarification, not a guess.

|                                                                         |                     |
|-------------------------------------------------------------------------|---------------------|
| Head-end protocol to be confirmed. Allowance made for an open protocol. | Clarification CL-01 |
| One seasonal visit included; a second visit offered as an option.       | Clarification CL-02 |

# From the first enquiry to the technical submission.



## Estimating and Tenders

Quotations, tender returns and pre-qualification answers from your rates, wording and standards.

### Quotation Builder

Priced from your rates, scope and exclusions set out

Word

PDF

### Tender Scope of Works

Every requirement mapped to a deliverable

Word

PDF

### Tender Return and Compliance Matrix

Every requirement answered or declared

Word

Excel

### PQQ and SQ Response

Answers from your approved company facts

Word

PDF

### Bill of Quantities Pricing Workbook

Live totals that reconcile to the quotation

Excel

PDF

### Subcontract Enquiry Pack

Packages that come back like for like

Word

Excel



## Design and Technical

Survey findings, specifications, technical queries and document control, for your engineers to check and approve.

### Site Survey Report

Notes and photos into findings and next steps

Word

PDF

### Technical Specification

Your clauses, cited standards flagged for checking

Word

PDF

### RFI and Technical Query Register

Who owes each answer, and since when

Excel

PDF

### Drawing and Document Register

Everyone works from the current revision

Excel

PDF

ALSO POSSIBLE

Technical Submittal Pack

Design Calculation Summary

Interactive tender showcase

Supplier quote comparison

Takeoff assist

Designer's risk assessment

# Safe and compliant

- RAMS and method statements
- Commissioning and test records
- Compliance calendars and certificates

**HALDEN**  
BUILDING SERVICES

SPECIMEN - FICTIONAL COMPANY AND DATA - NOT FOR USE - GEN-SPEC-2026-01

RISK ASSESSMENT AND METHOD STATEMENT  
HBS-RAMS-2026-0417 - REV B

## RISK ASSESSMENT AND METHOD STATEMENT

# AHU-02 replacement: RAMS

Covers isolation, strip-out, crane lift, installation, connection and commissioning of the replacement air handling unit on the level 3 plant deck.

|                                                               |                                                                                            |
|---------------------------------------------------------------|--------------------------------------------------------------------------------------------|
| PROJECT<br>AHU-02 replacement and level 3 ventilation upgrade | SITE<br>12 Tollgate Street, Calvermere ZZ1 9XY                                             |
| CLIENT<br>Tessenden Property Partners Ltd                     | PRINCIPAL CONTRACTOR<br>Halden, as principal contractor <span>AWAITING CONFIRMATION</span> |
| PLANNED START<br>07.09.2026 (four weeks)                      | CRANE LIFT<br>Saturday 12.09.2026, 07:00 to 13:00                                          |
| PREPARED BY<br>Rowan Tait, Contracts Manager                  | SITE SUPERVISOR<br>Morgan Pemberton                                                        |

## Scope of works

Isolate and drain the existing unit, dismantle it in sections, lift out by mobile crane, lift in the new packaged unit, position on new anti-vibration mounts, connect ductwork, LTHW, CHW and power, integrate controls to the BMS, then commission.

## Permits and documents required

| ITEM                                 | ISSUED BY               | STATUS                  |
|--------------------------------------|-------------------------|-------------------------|
| Lift plan (appointed person)         | Crane hire company      | <span>AWAITING</span>   |
| Permit to work: mechanical isolation | Halden supervisor       | <span>ON THE DAY</span> |
| Permit to work: electrical isolation | Halden supervisor       | <span>ON THE DAY</span> |
| Fire alarm isolation permit          | Client building manager | <span>ON THE DAY</span> |
| Refurbishment survey review          | Client                  | <span>AWAITING</span>   |
| Road closure, service yard           | By others               | <span>AWAITING</span>   |

## Regulations and guidance referenced

Construction (Design and Management) Regulations, Lifting Operations and Lifting Equipment Regulations, Work at Height Regulations, Electricity at Work Regulations, COSHH, and the code of practice for the safe use of cranes. The reference library and editions are AWAITING CONFIRMATION by the named health and safety lead before issue.

## Key contacts

| ROLE                       | NAME                   | CONTACT                            |
|----------------------------|------------------------|------------------------------------|
| Contracts manager          | Rowan Tait             | 01632 960 140                      |
| Site supervisor            | Morgan Pemberton       | Mobile on the site induction       |
| Client building manager    | Alex Samuels           | Via the client help desk           |
| Appointed person (lifting) | Named in the lift plan | <span>AWAITING CONFIRMATION</span> |

HALDEN BUILDING SERVICES LTD - CO. NO. 00000000 (SPECIMEN)

SPECIMEN - FICTIONAL COMPANY AND DATA

HBS-RAMS-2026-0417 - Page 1 / 4

- Specimen RAMS: fictional company and data.

# RAMS that wait for a competent person.

Task-specific RAMS drafted from your safe systems of work, so your competent person reviews rather than writes. The checks run first; issue waits for the named person.

Halden

AI workspace · Building Services

+ New task

Recent

Skills library

Runs and approvals

3

Brand and standards

RAMS Generator · run

AHU-02 replacement: crane lift, Saturday 12.09.2026 · HBS-RAMS-2026-0417 · Halden Building Services

Inputs

WHAT THE SKILL WAS GIVEN

Scope of works

from HBS-Q-2026-0417

Site survey notes and photos

Halden safe systems of work

Lift plan

awaiting, from crane hire company

Site

12 Tollgate Street, Calvermere

Client

Tessenden Property Partners Ltd

Contracts manager

Rowan Tait

Supervisor

Morgan Pemberton

Steps

Read scope and site notes

Scope of works, survey notes and photos

Select hazards and controls

From Halden safe systems of work

Draft sequence and hold points

Crane lift day included

List permits and documents required

With who issues each one

Run checks

See the checks panel

Competent person review

Waiting

Checks

4 passed · 3 to confirm

Brand and layout

Halden colours, fonts, logo and footer

✓ Pass

Page fit

Nothing dipped or cut off

✓ Pass

Every hazard has a control

Rated before and after controls

✓ Pass

Permits listed with issuer

Who issues each permit and document

✓ Pass

Uncertain facts

Flagged for a person to confirm, never guessed

P 3 awaiting

3 FACTS AWAITING CONFIRMATION

P Principal contractor role

P Appointed person (lifting)

P Regulation editions

Outputs

DOCX

RAMS · Word

Editable · Halden format

PDF

RAMS · PDF

Print-ready

Issue waits for the named competent person

AI never certifies, signs, approves or issues. A named person does.

Open for review

Illustrative recreation

**1 Built from what you hold.**  
The scope, the site notes and your own safe systems of work.

WHAT THE SKILL WAS GIVEN

- Scope of works  
from HBS-Q-2026-0417
- Site survey notes and photos
- Halden safe systems of work
- Lift plan  
awaiting, from crane hire company

**2 Checks before anyone sees it.**  
Brand, page fit, a control for every hazard, permits listed with who issues them.

- Brand and layout  
Halden colours, fonts, logo and footer ✓ Pass
- Page fit  
Nothing dipped or cut off ✓ Pass
- Every hazard has a control  
Rated before and after controls ✓ Pass
- Permits listed with issuer  
Who issues each permit and document ✓ Pass

**3 Awaiting competent person sign-off.**  
The skill prepares. Your competent person verifies and signs.

Awaiting competent person sign-off

BuiltAI

02 SAFE AND COMPLIANT

12

Specimen · Commissioning record, page 1 of 3

1

The commissioning basis stays awaiting confirmation until the named commissioning manager confirms it.

Commissioning method, test procedures and tolerances per the project specification and the commissioning codes it cites. The codes and editions are **AWAITING CONFIRMATION** by the named commissioning manager.

## 2

Pass where it passed; the missing ductwork leakage certificate shows as awaiting.

1

Commissioning method, test procedures and tolerances per the project specification and the commissioning codes it cites. The codes and editions are: **AWAITING CONFIRMATION** by the named commissioning manager.

## 2

3

| ROLE                   | NAME                   | ORGANISATION                      |
|------------------------|------------------------|-----------------------------------|
| Commissioning engineer | Jamie Sorensen         | Halden Building Services Ltd      |
| Controls engineer      | Named on the day sheet | Controls subcontractor (specimen) |
| Client witness         | Alex Samuels           | Tessenden Property Partners Ltd   |

## 3

Who commissioned, who witnessed, and for which organisation.

Specimen: fictional company and data.

# Safety and compliance records, prepared for the people who certify.

## Health and Safety (RAMS)

Task-specific RAMS, method statements and site safety records written to your safe systems of work, with a named competent person approving every issue.

### RAMS Generator

Task-specific, from your safe systems of work

Word

PDF

### Method Statement

Sequence, hold points, permits and controls

Word

PDF

### Site Induction Pack

Site rules, contacts and a sign-on record

Word

PDF

## Testing, Commissioning and Compliance

Statutory compliance tracking, inspection reports and test records set out clearly. Your qualified people certify.

### Compliance Calendar and Certificate Tracker

What to book or chase, and when

Excel

HTML

### Inspection and Test Report

Engineer's readings into clear findings

Word

PDF

### Commissioning Record Pack

Results against design values, gaps flagged

Excel

PDF

ALSO POSSIBLE

Permit to Work Pack

COSHH Assessment

Refrigerant and F-Gas Log

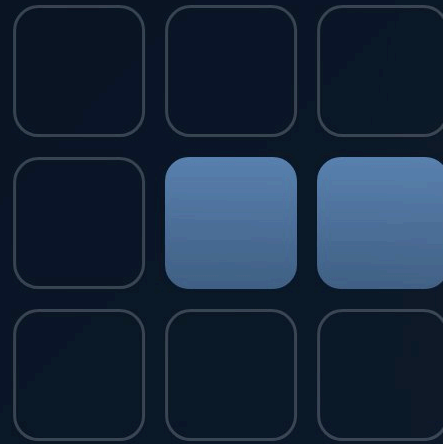
Electrical Test Results Preparation

H&S incident and near-miss log



The skills prepare. Your competent people verify, sign and certify.

# 03

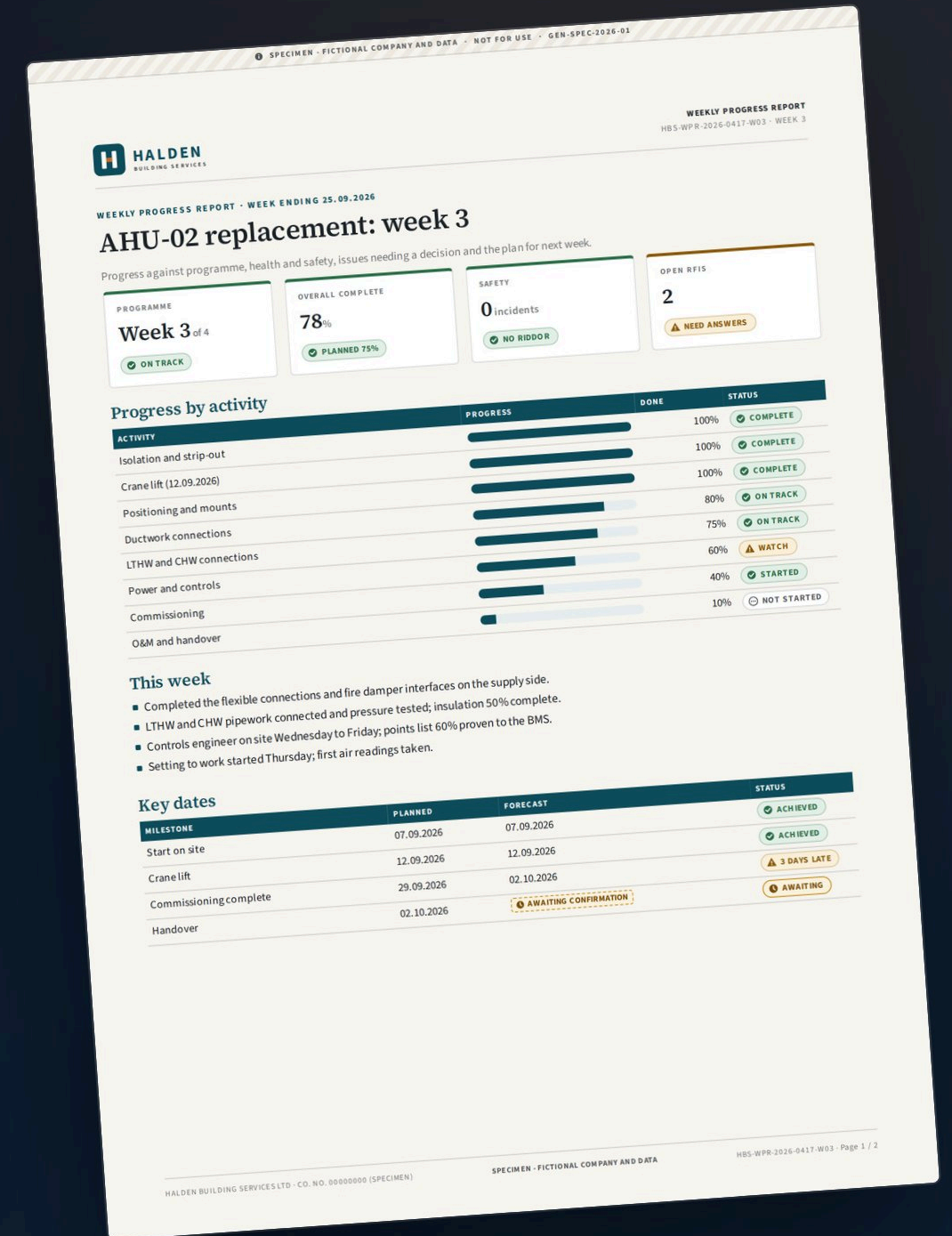


## CHAPTER 03

# Deliver and get paid

More jobs documented, the same way every time, with progress and payment figures that agree.

- Weekly progress reporting
- Applications for payment
- Variations and quote comparisons



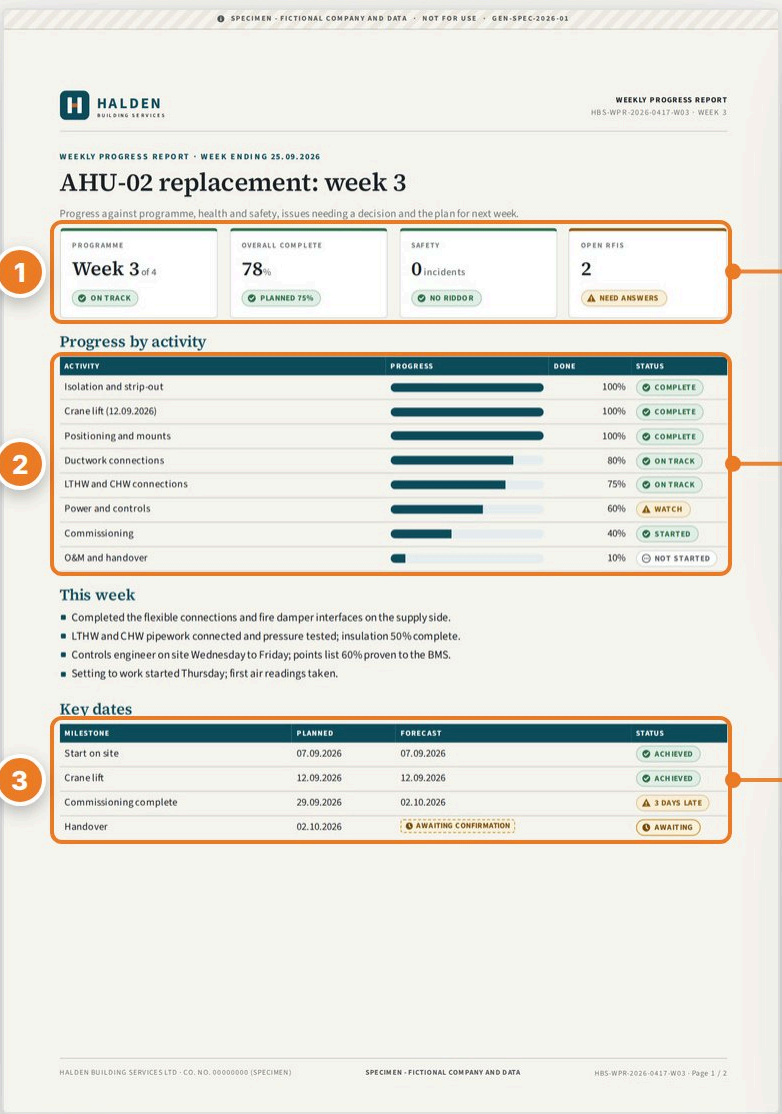
— Specimen weekly progress report: fictional company and data.

# The same report, the same standard, every week.

Work done, look-ahead, health and safety, issues and photos, in your brand and in the same format every week.

Specimen: fictional company and data.

Specimen · Weekly progress report, page 1 of 2



**1 The week at a glance.**  
Programme, progress, safety and open RFIs, each with its status.

|                                      |                                        |                                    |                                |
|--------------------------------------|----------------------------------------|------------------------------------|--------------------------------|
| PROGRAMME<br>Week 3 of 4<br>ON TRACK | OVERALL COMPLETE<br>78%<br>PLANNED 75% | SAFETY<br>0 incidents<br>NO RIDDOR | OPEN RFIs<br>2<br>NEED ANSWERS |
|--------------------------------------|----------------------------------------|------------------------------------|--------------------------------|

**2 Progress by activity.**  
What is complete, on track or worth watching.

| ACTIVITY                 | PROGRESS    | DONE | STATUS      |
|--------------------------|-------------|------|-------------|
| Isolation and strip-out  | <div></div> | 100% | COMPLETE    |
| Crane lift (12.09.2026)  | <div></div> | 100% | COMPLETE    |
| Positioning and mounts   | <div></div> | 100% | COMPLETE    |
| Ductwork connections     | <div></div> | 80%  | ON TRACK    |
| LTHW and CHW connections | <div></div> | 75%  | ON TRACK    |
| Power and controls       | <div></div> | 60%  | WATCH       |
| Commissioning            | <div></div> | 40%  | STARTED     |
| O&M and handover         | <div></div> | 10%  | NOT STARTED |

**3 Dates that say when they slip.**  
Forecast against plan, with anything unconfirmed flagged.

| MILESTONE              | PLANNED    | FORECAST              | STATUS      |
|------------------------|------------|-----------------------|-------------|
| Start on site          | 07.09.2026 | 07.09.2026            | ACHIEVED    |
| Crane lift             | 12.09.2026 | 12.09.2026            | ACHIEVED    |
| Commissioning complete | 29.09.2026 | 02.10.2026            | 3 DAYS LATE |
| Handover               | 02.10.2026 | AWAITING CONFIRMATION | AWAITING    |

# An application that adds up before it goes.

The periodic valuation against the contract sum and agreed variations, with retention and previous payments shown, so the figures reconcile before anyone signs.

# Specimen · Application for payment, page 1 of 2

SPECIMEN · FICTIONAL COMPANY AND DATA · NOT FOR USE · GEN-SPEC-2026-01

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**HALDEN**  
BUILDING SERVICES

**APPLICATION FOR PAYMENT**  
HBS-AFP-2026-0417-02 · APPLICATION 2

---

APPLICATION FOR PAYMENT · APPLICATION 2

## Application for payment no. 2

Interim application for work done to the end of the period, valued against the accepted quotation and agreed variations. Breakdown overlaid; the Excel version carries the live formulas.

|                                                                                  |                                                        |
|----------------------------------------------------------------------------------|--------------------------------------------------------|
| <b>COUNTERPARTY</b><br><b>AHU-02 replacement and level 3 ventilation upgrade</b> | <b>OUR REFERENCE</b><br><b>HBS-AFP-2026-0417-02</b>    |
| <b>CLIENT</b><br><b>Tessenden Property Partners Ltd</b>                          | <b>QUOTATION</b><br><b>HBS-Q-2026-0417</b>             |
| <b>VALUATION PERIOD</b><br><b>01.09.2026 to 30.09.2026</b>                       | <b>APPLICATION DATE</b><br><b>30.09.2026</b>           |
| <b>DUE DATE FOR PAYMENT</b><br>AWAITING CONFIRMATION                             | <b>FINAL DATE FOR PAYMENT</b><br>AWAITING CONFIRMATION |

**VALUATION SUMMARY**

|                                                                                 | £                 |
|---------------------------------------------------------------------------------|-------------------|
| Original contract sum (accepted quotation, excl. VAT)                           | 125,010.00        |
| Agreed variations                                                               | 780.00            |
| Adjusted contract sum                                                           | 125,790.00        |
| Gross valuation of work done to date                                            | 105,230.00        |
| Less retention (3%, rate per contract)                                          | -3,156.90         |
| Net valuation to date                                                           | 102,073.10        |
| Less previously applied (application 1: off-site materials, AHU, to 31.08.2026) | -49,853.15        |
| <b>Amount due this application, excluding VAT</b>                               | <b>52,219.95</b>  |
| VAT at the standard rate (20%)                                                  | 10,443.99         |
| <b>Amount applied for, including VAT</b>                                        | <b>£62,663.94</b> |

**AWAITING CONFIRMATION BEFORE ISSUE**

- Retention percentage and release terms under the contract
- Off-site materials terms (vesting and insurance) relied on for application 1
- Due and final dates for payment, and the payment notice process the contract sets
- VAT registration number, and whether the domestic reverse charge applies

**SUBMITTED FOR HALDEN**

Signed by: named commercial manager

NAME \_\_\_\_\_

SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_

**RECEIVED FOR THE CLIENT**

Tessenden Property Partners Ltd

NAME \_\_\_\_\_

SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_

HALDEN BUILDING SERVICES LTD · CO. NO. 000000000 [SPECIMEN]
SPECIMEN · FICTIONAL COMPANY AND DATA
HBS-AFP-2026-0417-02 · Page 1 / 2

Specimen: fictional company and data. A matching total is not a decision to issue.

- 1 From contract sum to amount due.**  
Variations, retention and previous applications, in one reconciled summary.

| VALUATION SUMMARY                                                               | £                |
|---------------------------------------------------------------------------------|------------------|
| Original contract sum (accepted quotation, excl. VAT)                           | 125,010.00       |
| Agreed variations                                                               | 780.00           |
| Adjusted contract sum                                                           | 125,790.00       |
| Gross valuation of work done to date                                            | 105,230.00       |
| Less retention (3%, rate per contract)                                          | -3,156.90        |
| Net valuation to date                                                           | 102,073.10       |
| Less previously applied (application 1: off-site materials, AHU, to 31.08.2026) | -49,853.15       |
| <b>Amount due this application, excluding VAT</b>                               | <b>52,219.95</b> |

- 2 What the contract has not confirmed.**  
Retention terms, payment dates and VAT treatment are listed for a person to resolve before issue.

**⌚ Awaiting Confirmation Before Issue**

- Retention percentage and release terms under the contract
- Off-site materials terms (vesting and insurance) relied on for application 1
- Due and final dates for payment, and the payment notice process the contract sets
- VAT registration number, and whether the domestic reverse charge applies

- 3 Signed by a named person.**  
Submitted by your named commercial manager, received by the client. Never by software.

| SUBMITTED FOR HALDEN                | RECEIVED FOR THE CLIENT         |
|-------------------------------------|---------------------------------|
| Signed by: named commercial manager | Tessenden Property Partners Ltd |
| NAME _____                          | NAME _____                      |
| SIGNATURE _____                     | SIGNATURE _____                 |
| DATE _____                          | DATE _____                      |

# From mobilisation to the final account.

## Project Delivery and Site

Mobilisation, programme, progress, meeting and defects records for works on site, kept consistent from start to close-out.

### Mobilisation Plan

Week by week: roles, milestones and risks

Word PDF

### Project Programme

Tasks, milestones and a Gantt view

Excel PDF

### Weekly Progress Report

The same format, every week

Word PDF

### Site Meeting Minutes and Actions

Decisions, owners and dates, carried forward

Word Excel

### Snagging and Defects Register

From inspection to close-out

Excel PDF

## Commercial and Accounts

Quote comparisons, orders, variations, payment applications and reconciliations, checked so the figures agree and internal costs stay internal.

### Supplier and Subcontractor Quote Comparison

Returned quotes on the same footing

Excel PDF

### Purchase Order Generator

Approved selections into controlled orders

Word PDF

### Variation Notice

Cost and time effect, from your rates

Word PDF

### Application for Payment

A valuation that reconciles before it goes

Excel PDF

### Cost and Invoice Reconciliation

Variances flagged for review

Excel

ALSO POSSIBLE

NEC compensation event pack

Variation narrative

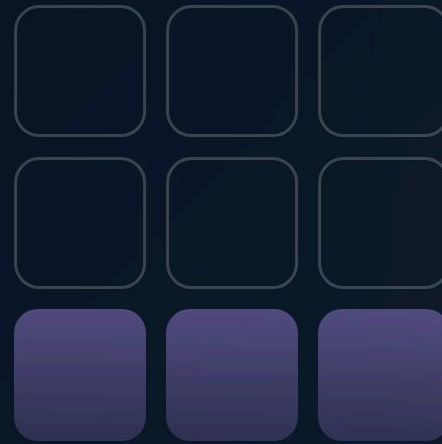
Final account

Retention tracker

Project cashflow forecast

Contract obligations register

# 04

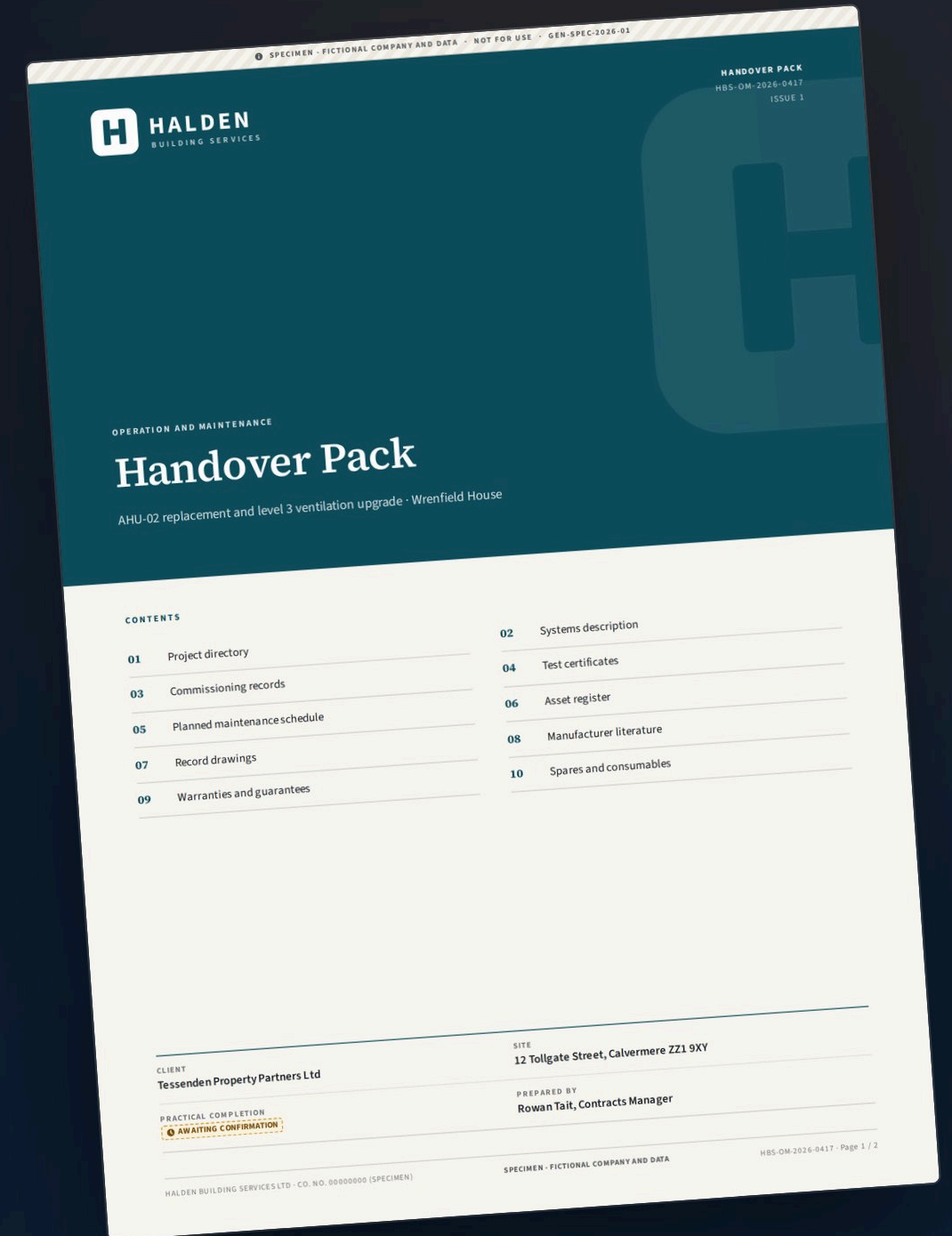


## ■ CHAPTER 04

# Hand over and keep it running

Every visit, handover and monthly report in your brand, so your engineers move on to the next job.

- Handover packs and O&M records
- Service and maintenance reports
- SLA and KPI reporting for clients



— Specimen O&M handover pack: fictional company and data.

Specimen · O&amp;M handover pack, page 2 of 2

**1 Every section, with its status.**  
Complete, open items, awaiting or in progress, at a glance.

| SECT. | SECTION                      | CONTENTS                                            | STATUS                            |
|-------|------------------------------|-----------------------------------------------------|-----------------------------------|
| 01    | Project directory            | Contacts, roles and emergency numbers               | <div><div></div>COMPLETE</div>    |
| 02    | Systems description          | AHU-02, controls and interfaces                     | <div><div></div>COMPLETE</div>    |
| 03    | Commissioning records        | Test record HBS-CTR-2026-0417-AHU02                 | <div><div></div>OPEN ITEMS</div>  |
| 04    | Test certificates            | Electrical installation certificate, pressure tests | <div><div></div>AWAITING</div>    |
| 05    | Planned maintenance schedule | Tasks and frequencies for the new unit              | <div><div></div>COMPLETE</div>    |
| 06    | Asset register               | Assets added and removed, with tags                 | <div><div></div>COMPLETE</div>    |
| 07    | Record drawings              | As-installed layout and schematic                   | <div><div></div>IN PROGRESS</div> |
| 08    | Manufacturer literature      | Unit, fans, controls and valves                     | <div><div></div>COMPLETE</div>    |
| 09    | Warranties and guarantees    | Workmanship and manufacturer terms                  | <div><div></div>AWAITING</div>    |
| 10    | Spares and consumables       | Filters, belts and recommended spares               | <div><div></div>COMPLETE</div>    |

**2 Awaiting confirmation before issue.**  
Completion date, warranty terms and certificates still to be signed are listed, not assumed.

**AWAITING CONFIRMATION BEFORE ISSUE**

- Practical completion date and the defects period under the contract
- Manufacturer warranty term and registration for the new unit
- Electrical installation certificate, signed by the named qualified supervisor

Specimen: fictional company and data.

**3 Handed over by a named person.**  
Signed by your contracts manager and received by the client's representative.

|                                                                                                                 |                                                                                                                    |
|-----------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|
| <p><b>HANDED OVER BY</b></p> <p>Signed by: named contracts manager</p> <p>SIGNATURE _____</p> <p>DATE _____</p> | <p><b>RECEIVED BY</b></p> <p>Signed by: client's named representative</p> <p>SIGNATURE _____</p> <p>DATE _____</p> |
|-----------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|



# Handover, maintenance and the monthly report.



### O&M and Handover

Handover packs, indexes and asset registers, ready for the client on day one.

Handover Pack Assembler

PDFindex

Certificates, drawings and warranties, indexed

Handover Document Index

ExcelPDF

What is complete, and what is still awaited

Asset Register Builder

Excel

Ready to load into your maintenance system

Aftercare and Maintenance Proposal

WordPDF

Planned maintenance proposed after handover



### Maintenance and Service Delivery

Planned and reactive maintenance paperwork, from intake to remedial quote.

Job and Work-Order Intake

HTMLacknowledgement

Prioritised against contract response times

PPM Schedule

ExcelPDF

Every asset, task and frequency, by site

Service and Call-Out Report

PDF

Visit notes into findings and follow-on work

Remedial Works Quotation

WordPDF

Findings quoted from your rates

Jobs and PPM Status Board

HTMLPDF

Open jobs and PPM by site, on one page



### Client Reporting and Governance

Client reporting and governance, to the same standard every period.

SLA and KPI Report

HTMLExcelPDF

Performance against target, every period

Client Review Meeting Brief

WordPDF

Agenda, decisions needed and points to raise

New Contract Onboarding Pack

WordPDF

Contacts, access and a controlled checklist

Risk and Issues Register

ExcelPDF

Owner, rating and next action

Management Summary

PDF

One page across your contracts

ALSO POSSIBLE

O&M Manual Builder

Building User Guide

One-page monthly board pack

Portfolio cockpit

Document lifecycle dashboard

# 05



## ■ CHAPTER 05 · YOUR BRAND, YOUR STANDARD

# Your standards, built in. Your people, signing off.

Your look, rates and wording held once and carried into every document. Your people check and sign.

- One source, every brand
- Choose your look
- Engineered for one business



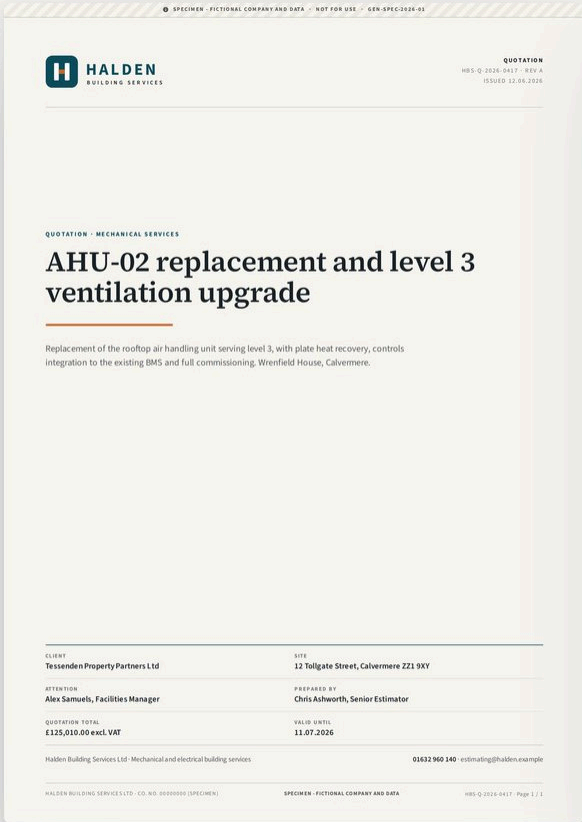
— Specimen quotation covers: fictional companies and data.

■ YOUR BRAND, YOUR STANDARD · ONE SOURCE

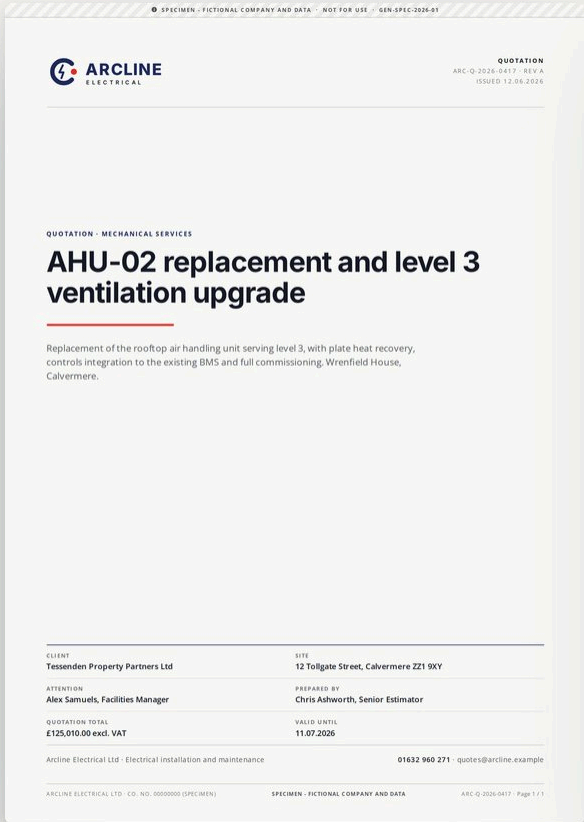
# One source. Every document in your brand.

The same quotation, built three times from one source in three different brands. Your colours, fonts, logo and voice are set once, and every skill inherits them.

- You choose and lock the look on real rendered samples before anything is built
- Your brand mark, correct on every background
- Reads cleanly in print and in black and white



Halden Building Services



Arcline Electrical



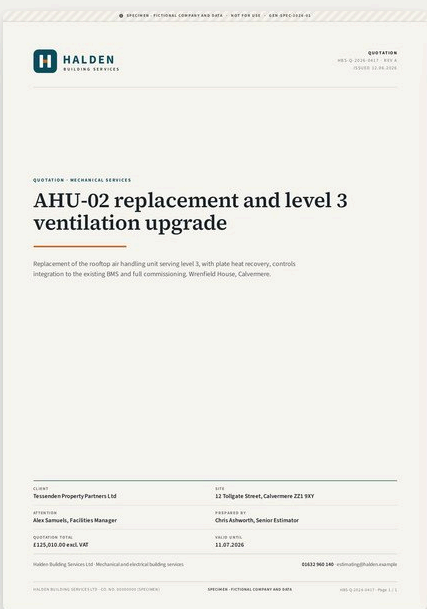
Greenfold Facilities

Specimens: fictional companies and data.

■ YOUR BRAND, YOUR STANDARD · DOCUMENT DESIGN

# Choose your look from real, rendered covers.

You pick a direction, or a mix by document type, on a short options and decisions form. It is then fixed in your design so every skill uses it.



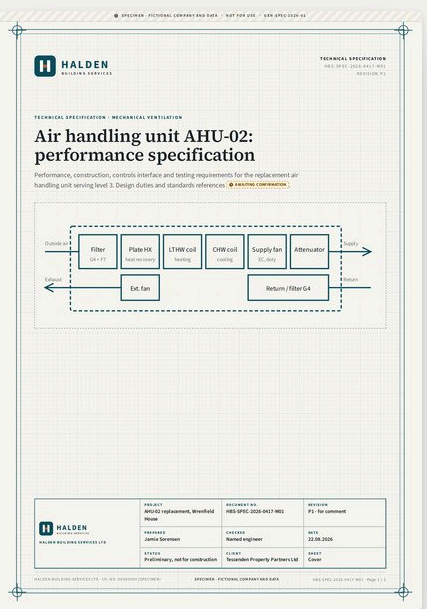
1 · Paper and Rule



2 · Brand Block



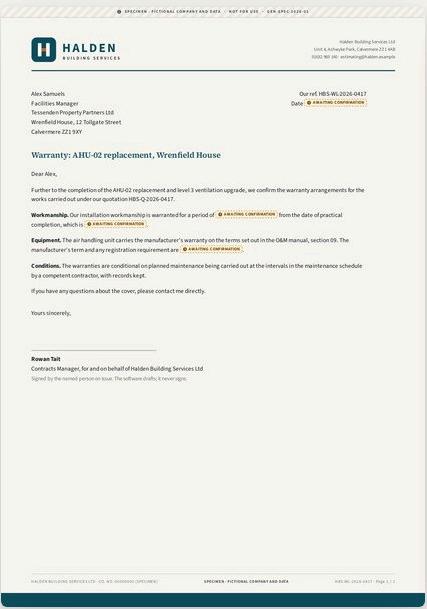
3 · Dossier



4 · Blueprint



5 · Sidebar Rail



6 · Letterhead Classic



7 · Full-bleed Photo

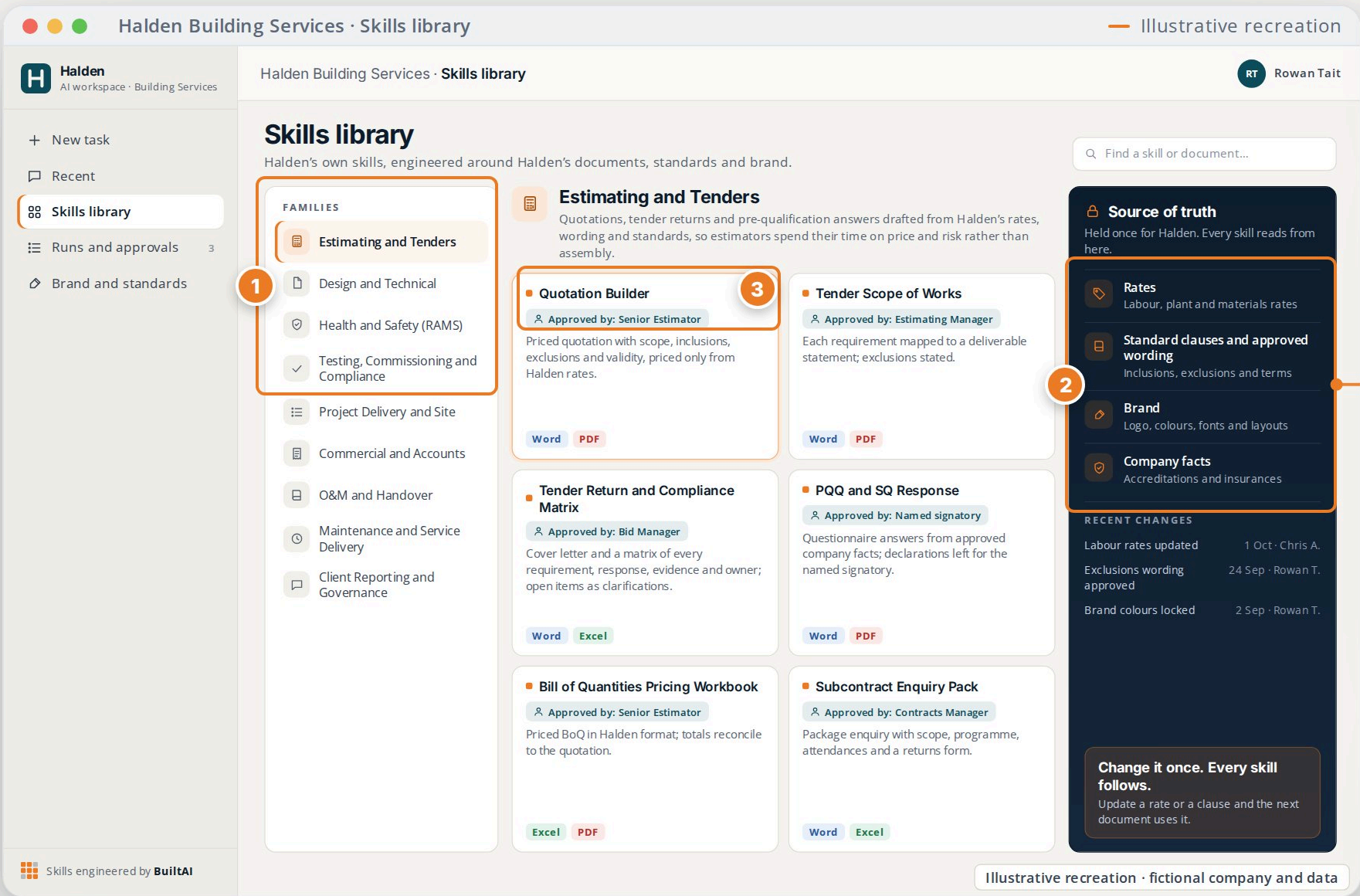


8 · Product / Report

Specimens: fictional company and data.

# Engineered for one business. Yours.

Every suite is designed and built for one business: its documents, rates, standards, wording and brand. You see and approve it on your own work before it goes live.



1 **Shaped around your work.**  
Families and skills chosen from the documents you produce.

- FAMILIES
- Estimating and Tenders
  - Design and Technical
  - Health and Safety (RAMS)
  - Testing, Commissioning and Compliance

2 **One source of truth.**  
Rates, approved wording, brand and company facts, held once.

- Rates  
Labour, plant and materials rates
- Standard clauses and approved wording  
Inclusions, exclusions and terms
- Brand  
Logo, colours, fonts and layouts
- Company facts  
Accreditations and insurances

3 **A named approver for each document.**  
Each skill names its approver: the person who signs today.

- Quotation Builder  
Approved by: Senior Estimator

# 06



## CHAPTER 06

# Built with you

More capacity, proved on your own documents, governed by your people, at a pace you set.

- Control and trust
- Who decides
- How we build it with you
- The value
- Straight answers

06 SPECIMEN - FICTIONAL COMPANY AND DATA - NOT FOR USE - GEN-SPEC-2026-01

QUOTATION  
HBS-Q-2026-0417 - REV A

**HALDEN**  
BUILDING SERVICES

SCOPE, TERMS AND ACCEPTANCE

### Inclusions, exclusions and terms

**Included**

- All labour, plant, materials and supervision to complete the scope in sections A to E
- Weekend crane lift with appointed person and lift plan
- Commissioning to the design duties, with witnessed tests and test records
- O&M information and record drawings at handover

**Excluded**

- Asbestos survey or removal (none expected; refurbishment survey to be confirmed by the client)
- Structural assessment of the plinth or roof beyond the provisional sum
- Changes to BMS head-end graphics by the client's controls specialist
- Builder's work in occupied areas outside the plant deck

**Assumptions**

- Four weeks on site, programmed to start 07.09.2026, with the crane lift on a weekend day
- Air handling unit lead time of about ten weeks from order (awaiting manufacturer confirmation)
- Existing LTHW and CHW systems are in serviceable condition at the connection points
- Clear crane access via the rear service yard, with a road closure arranged by others if needed

**Commercial terms**

|                |                                                                               |
|----------------|-------------------------------------------------------------------------------|
| VALIDITY       | 30 days from the date of issue, to 11.07.2026                                 |
| PAYMENT        | Monthly applications against work done, payment terms per the agreed contract |
| RETENTION      | As stated in the contract: <b>AWAITING CONFIRMATION</b>                       |
| CONTRACT BASIS | Form of contract to be agreed: <b>AWAITING CONFIRMATION</b>                   |
| VAT            | VAT registration number and VAT treatment: <b>AWAITING CONFIRMATION</b>       |

**AWAITING CONFIRMATION BEFORE ISSUE**

- Design duties and the specification edition referenced for the new unit
- VAT registration number, and whether the domestic reverse charge applies to this client
- Signatory name and title for issue of this quotation

**Acceptance**

|                                                                                                                                 |                                                                                                                                    |
|---------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|
| <b>ISSUED FOR HALDEN</b><br>Signed by: named authorised person<br>NAME _____<br>POSITION _____<br>SIGNATURE _____<br>DATE _____ | <b>ACCEPTED FOR THE CLIENT</b><br>Tessenden Property Partners Ltd<br>NAME _____<br>POSITION _____<br>SIGNATURE _____<br>DATE _____ |
|---------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|

HALDEN BUILDING SERVICES LTD - CO. NO. 00000000 (SPECIMEN)      SPECIMEN - FICTIONAL COMPANY AND DATA      HBS-Q-2026-0417 - Page 3 / 3

— Specimen quotation acceptance page: fictional company and data.

# AI never certifies, signs, approves or issues. **A named person does.**

## FLAGS, NEVER GUESSES

Anything a skill cannot confirm, such as a standard's edition or a VAT basis, prints as "awaiting confirmation" for a person to resolve.

## COMPETENT SIGN-OFF STAYS HUMAN

Certificates, RAMS and compliance records carry a named competent person's signature block. Your engineer verifies and signs.

## CHECKS BEFORE ANYONE SEES IT

Brand, page fit, totals that reconcile, internal costs kept out of client copies, open points listed.

## A TOTAL IS NOT A DECISION

Matching figures are useful. Input accuracy, technical review and the decision to issue stay separate, and stay with your team.

## PROTECTED WORDING

Load-bearing legal and safety clauses are protected against casual edits, and rates come only from your validated rate source.

## YOUR DATA, HANDLED PROPERLY

Live data is handled under an agreed data and security schedule; Claude business plans do not train on customer data by default.

Named approver on every document

Awaiting confirmation, never guessed

Editable files you own

Fictional data in every example

# Tool support is not a professional appointment.

Responsibilities stay explicit, so everyone knows who checks what and who decides when a document is ready.

|                                    |                                                                                                                     |
|------------------------------------|---------------------------------------------------------------------------------------------------------------------|
| BUILT AI                           | Designs, builds and supports your skills, with the scope agreed with you. Not a construction or design appointment. |
| YOUR TEAM                          | Provides permitted inputs and assesses accuracy, assumptions, suitability and completeness.                         |
| TECHNICAL AND COMMERCIAL REVIEWERS | Review the work within their actual remit. Roles and appointments are agreed, not inferred.                         |
| AUTHORISED ISSUER                  | Decides whether and when a document is issued. A checked total is not that decision.                                |

01 Skill drafts



02 Checks run



03 Reviewer checks



04 Issuer decides

# Small steps, real documents, your sign-off at every gate.

**01**

## Discovery

A short call and a look at real examples of your documents. We learn how you work today.

**02**

## Catalogue and design

Your skills catalogue, plus your document look rendered on real samples. You pick it and lock it.

**03**

## Pilot

A small first set of skills, built on your real documents. You test them and sign them off.

**04**

## Rollout

The rest of your suite in phases, in the order that matters most to you.

**05**

## Support

Changes to rates, wording or standards made once and carried through every document.



You approve at every gate. Nothing moves to the next stage, and no skill goes live, until you say so.

# More capacity from the team you already have.

What would your business do with more hours in the week? Here is one illustrative way to count them. It is a worked example, not a promise.

ILLUSTRATIVE

# 84 h

of assembly time back a month

ILLUSTRATIVE

# 1,008 h

of assembly time back a year

ILLUSTRATIVE WORKING, NOT A PROMISE

40 documents a month × 3 hours each × 70% of assembly time removed = 84 hours a month, 1,008 hours a year.

NOT COUNTED IN THE FIGURES

Fewer errors and less rework, consistency across authors, and senior time back on pricing, clients and delivery.

YOUR NUMBERS, NOT OURS

Every figure on this page is illustrative. At discovery we work it through with your own volumes, and your numbers replace ours.

# No rip and replace. Better documents from the tools you have.

## IN

### What you already hold

Drawings, surveys, specifications, site notes and photos, supplier quotes, exports from your job, CAFM or accounts systems, and your current documents and rate sheets.



## THROUGH

### Claude, in a workspace you control

Your team uses the skills inside Claude, with the access and controls you set. Each skill goes live only when you have signed it off on your own documents.



## OUT

### Standard files you own

Editable Word and Excel files and print-ready PDFs, plus HTML where a skill calls for it, named to your convention and saved where your team already keeps them.

**Start small.** A pilot on a small first set of skills runs alongside your current process, on real documents, before anything wider is decided.

# Straight answers.

## Will it get things wrong?

It is built to flag uncertainty rather than guess, every draft runs through automatic checks, and a named person approves every document before it leaves.

## Is it really our brand?

Yes. You see your documents rendered for real and choose the look before we build. Your brand is held in one source every skill uses.

## What about our data?

Examples are fictional. Live data is handled under an agreed data and security schedule. Describe the task first; share sensitive material only once a suitable route is agreed.

## Are we locked in?

No. The outputs are standard files that you own and can edit.

## Does it replace our people?

No. It adds capacity to the team you have. It removes the assembly, not the judgement: your people price, advise, verify, sign and win the work.

## How much effort is it for us?

A discovery call, examples of your current documents, and a named person to review the pilot. We do the building.

# Start with the document that takes the most time.

## THE TASK

### What does your team need to produce?

An enquiry, a tender, a report or a record. Start with the document that costs the most time.

## THE REVIEW

### Who must check it, and who decides?

Name the technical, commercial and issue decisions that stay with your team.

## THE FIT

### What access, formats and support would you need?

Agreed with you before anything is built.

## WHAT TO BRING

- A few examples of the document as you produce it today
- Your rates, standards or approved wording, if they apply
- The person who signs it today

✓ Describe the task first. Please do not send personal, confidential or client-sensitive material until a suitable sharing route is agreed.

Not sure where to start? A skill router can suggest a workflow from a short brief and show its reasoning; your team confirms the fit.

# What would your business do with more capacity?

More tenders answered, more jobs documented and more time for the work that wins, with the team you already have. A short call is the easiest place to start. No obligation, and you lead on timing.

TALK TO US



**hello@built-ai.io**

built-ai.io

**BETTER DOCUMENTS. IMPROVED STANDARDS.**

BuiltAI Intelligence Ltd · Company No. 17269241

BAI-SKB-2026-GEN · Screens are illustrative recreations. Documents shown are specimens with fictional companies and data.

