

BEFORE A SALE OR LICENCE

Your construction archive, understood.

A practical starting point for contractors, specialist trades, building-services businesses and their advisers.

The estimate, the revision, the instruction and the final account tell a project's story. Start by describing what you hold and how the records connect. Paper, digital and mixed archives can all be discussed.

Follow the project, not just the file type.

01

**Tender &
quantities**

02

**Instruction or
variation**

03

**Site evidence &
revisions**

04

**Final account or
follow-up**

Commercial history

Bills of quantities, estimates, tender revisions, valuations and variations, linked to the final account. Keep proposed changes distinct from recorded instructions or approvals.

Technical decisions

Requests for information and responses, drawing revisions, as-built records, method changes and the reasoning behind material or installation choices.

Testing and follow-up

Commissioning results, moisture readings, defect photographs and remedial-work histories. Include the context of a test or repair, not only its result.

Start with a description. Do not send confidential files.

No archive upload, client documents or account access is needed for an initial enquiry.

YOUR INITIAL CHECKLIST

Build a useful first inventory.

A short, honest outline is more useful than a large file transfer. Approximate quantities are fine; flag what you do not yet know.

- ☐ **Business and authority**
Describe your trade and whether the business is trading, closing or being sold. Identify who can discuss the archive and who will review permissions.
- ☐ **Dates and project coverage**
Give the broad date range and approximate number of projects. Note significant gaps, missing attachments or incomplete project histories.
- ☐ **Record types**
List what is present: estimates, drawings, correspondence, programmes, site records, test results, final accounts or internal procedures.
- ☐ **Formats and quantity**
Say whether records are paper, digital or mixed. Estimate boxes, folders or storage volume, and name any specialist software needed to open them.
- ☐ **Connections and condition**
Note whether project numbers, dates or revision references connect the files. Flag duplicates, corrupt files and inaccessible systems.
- ☐ **Restrictions and practical deadlines**
List known permission questions without naming clients or sites. Mention planned account closures or disposal dates for your adviser to review.

EXAMPLE OF A SAFE FIRST DESCRIPTION

"We are a flooring contractor with ten years of project estimates, installation records and test results. The archive is a mix of spreadsheets, PDFs and paper folders. Project references link many files; permissions and exclusions still need review."

Illustrative only. Use broad descriptions, not client names or sensitive project details.

REVIEW BEFORE SHARING

Keep the boundaries clear from the start.

Use these questions with the person responsible for the archive and, where needed, a suitably qualified adviser.

01 Who can approve the next step?

Identify the relevant business and decision-maker. For a closure, restructuring or business sale, involve the appointed office-holder or transaction adviser before offering records or arranging disposal.

02 Which rights and restrictions need checking?

Review client, designer, consultant and subcontractor material separately. Ask about ownership, permitted uses, confidentiality and restrictions in contracts. Set unresolved categories aside.

03 What should stay out of the enquiry?

Exclude personal information, client-confidential files, open-dispute material and security-sensitive building details. Do not send passwords, complete mailboxes or server backups.

04 What would a later review involve?

Before any sample or wider access, agree its scope, the intended use, who would receive it and how it would be handled. Ask for written commercial terms and costs before making a commitment.

Start with a description.

Free first look, no upfront charge, reply within one week.

info@mckays.co.uk

Send the outline, not the archive. No confidential attachments.

General guidance only, not a valuation and not legal, tax or insolvency advice. A first discussion is not a purchase offer or a guarantee that an archive is suitable for sale or licensing.

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