



ESTD 1859

**BES Group**



# Engineering Inspection

**A Broker's Guide**

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# Introduction

**We have created this brief guide to Engineering Inspection to help brokers ask the right questions when considering moving a contract.**

This will enable you to obtain the relevant information to market an inspection contract efficiently and with less risk. There are a few vital pieces of information that you need to obtain from your client to send on to other inspection providers to enable them to accurately quote. In this simple guide, we give you all the typical elements you need and some questions to ask the incumbent provider, prior to marketing the contract.



# Minimum requirements needed for us to quote

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When you next market an Engineering Inspection policy, you need to make sure you are provided with the following as a minimum:

## The plant schedule

Does it have the all the information needed?

- **What needs inspecting?** (make, model and size of item requiring inspection e.g.: Passenger Lift, Kone, 8 Floors)
- **Where does it need inspecting?** (address and full postcode required)
- **When does it need its next inspection?** (next inspection date - is it urgent?)
- **When was it last inspected?** (last inspection date - is it overdue?)

If the Plant Schedule includes all the above information, as a minimum, it will allow us to provide an accurate quote and provide you with our most competitive terms.

If any of this information is not provided, we will need to make some assumptions, which can often increase the cost of our quotation.

It is recommended that you supply us with the Plant Schedule in an Excel Spreadsheet. This will enable us to provide a quote as quickly as possible. Most engineering inspection companies can easily provide this.

If you provide a printed/scanned copy of a Plant Schedule or in a PDF, this can cause a delay in issuing a quote.

## Why is this information important?

- It shows the inspection frequency (*e.g.: 6 months or 12 months*) and can dramatically affect price
- It shows how often a site has been visited a year, which also affects price
- Depending on when the Plant Schedule was produced, it will reveal any 'overdue' inspections. You can use this to put pressure on the incumbent inspection provider, if the renewal terms have increased. But critically, you may have evidence that inspections have not been completed on time, which jeopardises your client's risk management programme, representing a potentially significant legal threat to them
- You can also ask for a Plant Schedule from the incumbent inspection provider that shows the last Plant Not Available (PNA) Reports, for the same reason – these may represent an 'unknown' overdue position for your client, that you need to make them aware of.

# The unseen detail

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For larger contracts, there may be many bespoke requirements that can add to the cost. Here are just a few examples:

- **Does the plant/equipment need to be tagged or colour coded after each inspection?**
- **Is there a requirement to isolate (turn off) machinery or equipment if the Engineer Surveyor discovers a serious defect?**
- **Is there a requirement to escalate the reporting of serious defects to anyone in the organisation by phone and email?**
- **Are there any special entry or exit requirements for Engineer Surveyors on site that the client might want completing?**
- **SUD cover? Is it just for specified pressure plant only, or is it for all inspected plant?**

## Obtaining the relevant information

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What if the existing inspection provider refuses to give you the Plant Schedule in an Excel Spreadsheet, or says they are unable to give you more information?

- Without that information, you will not be able to move the contract
- All inspection providers CAN provide this easily - any reputable inspection provider should be members of The Safety Assessment Federation (SAFed). All members of SAFed have agreed that information should be shared freely when contracts move between providers
- Outcome 6 of Treating Customers Fairly (TCF) clearly states that: *"Consumers do not face unreasonable post-sale barriers imposed by firms to change product, switch provider, submit a claim or make a complaint."*



# What other information do you need to obtain an inspection contract?

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You now need to provide us with:

- **Who** the key client contact is with whom we need to arrange the site inspection – *(Name, Job Title, and Telephone Number are all required)*



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