

Security offer-to-completion issue log

Use both sheets together. Give each issue a reference and record its evidence before discussing an amount. These are prompts, not assumed defects.

Business, offer date and proposed transaction

Issue reference	Evidence and document reference	Disputed amount (£), or not yet known
A: Guarding assignments		
B: Alarm renewals		
C: Monitoring obligations		
D: Owner replacement		
E: Staff and service commitments		
F: Complaints and callbacks		
G: Cash, debt and fees		

Other issue: reference, evidence and proposed amount

Keep confidential customer and staff records in your own secure files. Use the evidence field for a reference to those records.

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.

Resolve the security offer issues

Use the same references as the first sheet. Check the accounts and draft documents for overlap. Write where each agreed treatment belongs, who will resolve it and the date.

Business and review date

Same issue reference	Overlap check and agreed treatment	Owner and resolution date
A: Guarding assignments		
B: Alarm renewals		
C: Monitoring obligations		
D: Owner replacement		
E: Staff and service commitments		
F: Complaints and callbacks		
G: Cash, debt and fees		

Largest open gap and the record or adviser answer needed

Choose the largest unresolved evidence gap. Gather the record or adviser answer that could settle it before discussing a revised offer.

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.

A free first conversation

Bring your issue log to a free first conversation.

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Speak with Simon

