



RISE

Retrofit information,
support & expertise

How to build successful contractor relationships

Supply chain advice pack

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Introduction

Developing strong working relationships with principal contractors is essential for securing a sustainable pipeline of retrofit work and supporting long-term business growth. Effective partnerships are built on trust, reliability, consistent performance, and a shared commitment to quality delivery.

In an increasingly regulated retrofit market, principal contractors rely on subcontractors who can demonstrate technical competence, maintain compliance with programme requirements, and contribute positively to customer outcomes. Organisations that consistently deliver high-quality work, communicate effectively, and respond proactively to challenges are more likely to secure repeat business and strengthen their position within delivery networks.

This guide provides practical advice to help retrofit subcontractors build productive, long-lasting relationships with principal contractors, enhance their reputation within the sector, and maximise opportunities for future work.

Step 1: Get to know your contractor

Building a strong relationship starts with understanding how the contractor operates and what they expect from their supply chain partners. Taking the time to understand their business, delivery approach, and organisational priorities can help you align your services with their requirements and establish yourself as a reliable and valued subcontractor.

Every contractor will have its own culture, processes, and expectations. Developing a clear understanding of these factors can help strengthen communication, improve collaboration, and support successful project delivery.

Consider the following:

- What are the contractor's business objectives, values, and priorities, and how can your organisation contribute to achieving them?
- What standards do they expect from their subcontractors in terms of quality, compliance, customer service, and health and safety?
- How do they approach customer engagement and project delivery? For example, do they place particular emphasis on customer experience, social value, or community engagement?
- What are their preferred methods of communication and reporting? Are project updates typically managed through digital platforms, email, telephone calls, or regular meetings?
- What programme requirements, key performance indicators (KPIs), or contractual obligations are they working towards?



By understanding the contractor's objectives and ways of working, you can tailor your approach to support their wider delivery goals. Demonstrating that you understand their requirements and can integrate effectively into their delivery model helps build trust, establish productive working relationships, and create opportunities for future work.

Step 2: Establish a clear communication strategy

Effective communication is fundamental to successful project delivery and maintaining strong relationships with principal contractors. Establishing clear communication processes from the outset helps ensure that expectations are understood, information is shared efficiently, and potential issues are identified and resolved before they affect programme delivery.

A transparent and proactive approach to communication can help improve collaboration, reduce misunderstandings, and demonstrate your professionalism as a delivery partner.

Consider the following good practice principles:

- **Communicate openly and honestly:** Share relevant information in a timely manner, including progress updates, risks, delays, or challenges. Transparency helps build trust and credibility with both the contractor and wider project team.
- **Agree communication channels and responsibilities:** Understand how project information, updates, and instructions will be shared. This may include contractor portals, project management systems, SharePoint sites, email communications, or scheduled meetings.
- **Become familiar with required systems and processes:** Ensure relevant staff are trained and confident in using any platforms or reporting tools required by the contractor. Consistent use of agreed systems helps minimise errors, avoid missed communications, and maintain accurate project records.
- **Seek clarification when needed:** Do not make assumptions. Where requirements, instructions, or programme expectations are unclear, ask questions early to ensure there is a shared understanding.
- **Provide timely responses:** Responding promptly to enquiries, requests for information, and project updates demonstrates reliability and helps maintain project momentum.

By establishing effective communication practices from the start, subcontractors can strengthen working relationships, improve project coordination, and contribute to the successful delivery of retrofit programmes.

Step 3: Agree how the subcontract will be delivered

Establishing a clear understanding of how the subcontract arrangement will operate is essential before work begins. Defining roles, responsibilities, processes, and delivery expectations at an early stage helps minimise misunderstandings, improve accountability, and support efficient project delivery.

Taking the time to agree how work will be allocated, managed, and monitored can help create a positive working relationship and ensure that all parties are aligned from the outset.

Consider the following:

Work Allocation and Award Process

- Understand how opportunities will be allocated and communicated throughout the contract period.
- If operating under a framework agreement, clarify how work packages will be allocated, the criteria for award, and expected timescales.
- If work is being directly awarded, establish how instructions will be issued, who will authorise works, and how acceptance of the work package will be managed.
- Confirm any requirements relating to capacity, response times, or performance standards that may influence future work allocation.

Roles and Responsibilities

Clearly define who is responsible for each aspect of delivery and identify the key contacts within both organisations.

- Who will have overall responsibility for contract management?
- Who will act as the primary day-to-day point of contact?
- Which team members will be responsible for scheduling, technical queries, quality assurance, customer liaison, and reporting?
- How will issues or escalations be managed if challenges arise during project delivery?

Project Programme and Milestones

Ensure there is a shared understanding of delivery expectations and key project dates.

- Confirm agreed start dates and anticipated completion dates.

- Understand any critical milestones, programme targets, or key delivery deadlines.
- Clarify reporting requirements and progress review arrangements.
- Identify any dependencies that could affect programme delivery, such as access arrangements, design approvals, surveys, or material availability.

By agreeing delivery arrangements at the outset, subcontractors can establish clear expectations, strengthen project coordination, and reduce the risk of delays, disputes, or communication issues during delivery. A well-defined approach demonstrates professionalism and provides a strong foundation for a successful long-term partnership.

Step 4: Define roles and responsibilities

Clearly defining roles and responsibilities is essential for effective subcontract management and successful project delivery. Establishing accountability from the outset helps ensure that tasks are completed efficiently, decisions are made by the appropriate individuals, and communication flows effectively between all parties involved.

A useful way to achieve this is by developing a **RACI matrix** (Responsible, Accountable, Consulted, Informed). Widely used in project management, a RACI matrix provides a clear and structured overview of who is involved in each activity and the role they play throughout the delivery process.

When managing a subcontract arrangement, adopting a project-based approach can help improve coordination and reduce uncertainty. A RACI matrix can be used to clarify responsibilities across key activities, such as:

- Contract mobilisation and onboarding.
- Project planning and scheduling.
- Customer communications and appointment management.
- Installation delivery.
- Quality assurance and inspections.
- Health and safety management.
- Reporting and performance monitoring.
- Issue resolution and escalation.
- Contract close-out and handover.

A clearly defined RACI matrix helps ensure that:

- Responsibilities are understood by all parties.
- Accountability for key decisions is clearly assigned.
- Communication and escalation routes are established.
- Duplication of effort and gaps in delivery are minimised.
- Project teams can work more effectively and collaboratively.

	Contract manager	Project manager	Site manager	Installer
Retrofit design	I	R	A	C
Specification list	I	R	C	A
Procure materials	I	A	C	R
Resident engagement	I	A	I	R
Resident handover	I	R	I	A

Figure 1: Example RACI Matrix
Source: RISE

By agreeing roles and responsibilities early in the relationship, both the principal contractor and subcontractor can establish clear expectations, improve project governance, and create a strong foundation for successful delivery.

Step 5: Contractual agreements

A clear understanding of the contractual agreement is essential for establishing a successful working relationship and ensuring both parties are aware of their obligations. Taking the time to review and understand the contract before work begins can help manage risk, avoid misunderstandings, and reduce the likelihood of disputes during project delivery.

Subcontractors should ensure they fully understand not only their own responsibilities, but also the commitments and obligations of the principal contractor. This provides greater clarity around expectations, performance requirements, and commercial arrangements.

Key considerations include:

- **Understand your contractual obligations:** Review the agreement carefully to understand the requirements placed on your organisation. This may include



maintaining specific accreditations, insurance cover, qualifications, record-keeping arrangements, warranty obligations, or post-installation responsibilities.

- **Clarify commercial arrangements:** Ensure you understand payment terms, invoicing procedures, evidence requirements, retention arrangements, and expected payment timescales.
- **Review key contractual clauses:** Pay particular attention to provisions relating to liability, indemnities, dispute resolution, confidentiality, data protection, and contract termination.
- **Confirm performance expectations:** Understand any programme-specific requirements, service levels, key performance indicators (KPIs), quality standards, reporting obligations, or compliance requirements that may apply.
- **Seek clarification where required:** If any aspect of the agreement is unclear, raise questions before signing the contract to ensure there is a shared understanding of responsibilities and expectations.
- **Maintain accurate records:** Retain copies of signed contracts, amendments, insurance documentation, correspondence, and any supporting documents to provide a clear audit trail throughout the contractual relationship.

Investing time in understanding the contractual arrangements from the outset helps establish clear expectations, protects both parties, and creates a strong foundation for a productive and professional long-term partnership.

Step 6: Develop an agreed delivery plan

A clear and agreed delivery plan provides the foundation for successful project delivery. It helps ensure that all parties have a shared understanding of what is to be delivered, when it will be completed, and the standards that must be achieved. Establishing these expectations from the outset can help improve coordination, reduce delays, and support positive working relationships throughout the project lifecycle.

The delivery plan should clearly define the scope of works, programme requirements, responsibilities, and measures of success to ensure all parties are aligned.

Key considerations include:

- **Define the scope of works:** Ensure there is a clear understanding of the measures to be installed at each property, including any programme-specific requirements, technical specifications, and quality standards.
- **Agree delivery timescales:** Confirm installation schedules, programme milestones, completion targets, and any reporting deadlines that must be met.

- **Establish completion requirements:** Understand what constitutes successful completion of the works, including inspection requirements, quality assurance checks, documentation, photographic evidence, certifications, and customer sign-off procedures.
- **Define success measures:** Agree how performance will be assessed throughout delivery. This may include quality metrics, programme deadlines, customer satisfaction measures, compliance requirements, first-time pass rates, and health and safety performance.
- **Identify risks and dependencies:** Consider any factors that could affect delivery, such as property access, material availability, design approvals, or customer availability, and agree how these will be managed.

A well-defined delivery plan helps ensure that expectations are clearly understood, performance can be effectively monitored, and work is delivered safely, efficiently, and to the required standard. It also demonstrates professionalism and provides confidence to the principal contractor that your organisation can deliver consistently and reliably.

Step 7: Delivery

Successful subcontractors do more than complete the required works. They make delivery as straightforward and hassle-free as possible for the principal contractor. By consistently delivering to a high standard, communicating proactively, and addressing issues before they become problems, you can build trust and position your organisation as a valued delivery partner.

Contractors are more likely to offer repeat work to subcontractors who are dependable, responsive, and require minimal intervention to manage.

Consider the following good practice principles:

- **Maintain proactive communication:** Keep the contractor informed throughout delivery by providing regular updates on progress, completed works, programme milestones, and any emerging risks or issues.
- **Aim to exceed expectations:** Look for opportunities to add value through professionalism, attention to detail, effective customer service, and high-quality workmanship. Small improvements can have a significant impact on the contractor's confidence in your organisation.
- **Meet agreed targets and deadlines:** Deliver works in accordance with agreed timescales wherever possible. Where delays or challenges arise, communicate them early and work collaboratively to identify solutions.
- **Ensure roles and responsibilities are understood:** Make sure everyone involved in delivery understands their responsibilities, reporting requirements, and deadlines to support efficient project management.

- **Resolve issues quickly and professionally:** Address problems as soon as they arise and communicate proposed solutions promptly. A proactive approach demonstrates accountability and helps maintain confidence in your ability to deliver.
- **Provide complete and accurate documentation:** Submit required evidence, certifications, photographs, and completion records in the format and timescales specified by the contractor.

By delivering reliably, communicating effectively, and making project management easier for the principal contractor, you can strengthen working relationships, enhance your reputation, and improve your chances of securing future work opportunities.

Step 8: Demonstrate value and highlight achievements

Demonstrating the value your organisation brings to a project can help strengthen relationships with principal contractors and position your business for future opportunities. While meeting contractual requirements is essential, showcasing achievements and positive outcomes helps reinforce your reputation as a high-performing delivery partner.

Throughout the project, ensure that successes are recognised and communicated appropriately.

Consider the following:

- **Communicate key achievements:** Regularly highlight where delivery targets, key performance indicators (KPIs), quality standards, or programme milestones have been met or exceeded.
- **Demonstrate added value:** Share examples of improvements or efficiencies that have positively impacted delivery. This could include streamlining installation processes, reducing programme timescales, or improving customer experience.
- **Share positive feedback:** Collate and communicate positive feedback received from residents, site teams, project managers, or other stakeholders where appropriate.
- **Evidence performance outcomes:** Use data and measurable results to demonstrate your contribution to project success, such as high customer satisfaction scores, strong quality metrics, or timely completion rates.
- **Recognise team contributions:** Highlight the efforts of individuals and teams who have played a significant role in successful delivery.



Regularly communicating achievements helps demonstrate your capability, reinforces confidence in your organisation, and supports the development of a long-term partnership with the contractor.

Step 9: Seek feedback and continuously improve

Strong contractor relationships are built on a commitment to continuous improvement. Seeking feedback demonstrates professionalism, openness to learning, and a willingness to adapt your approach to better support future delivery requirements.

Feedback should not be viewed solely as a measure of performance but as an opportunity to identify strengths, address challenges, and improve future ways of working.

Consider the following:

- **Actively seek feedback throughout delivery:** Engage with the principal contractor to understand what is working well and where improvements could be made.
- **Conduct a project review or lessons learned session:** At the end of a project, arrange a formal review with key stakeholders to discuss successes, challenges, and opportunities for improvement.
- **Gather insights from multiple perspectives:** Seek feedback from project managers, site teams, customers, and other delivery partners to gain a well-rounded view of performance.
- **Implement lessons learned:** Use feedback to refine processes, improve communication, strengthen delivery arrangements, and enhance customer outcomes on future projects.
- **Share improvements with the contractor:** Demonstrating that feedback has been acted upon shows commitment to continuous improvement and helps build confidence in your organisation.

By actively seeking feedback and applying lessons learned, subcontractors can strengthen delivery performance, improve working relationships, and increase their chances of securing future work opportunities.

Summary

Developing and maintaining strong relationships with principal contractors is key to securing repeat business, strengthening your reputation, and supporting long-term growth within the retrofit sector. Successful partnerships are built on a clear understanding of expectations, effective communication, strong project governance, and the consistent delivery of high-quality work.

By investing time in understanding how contractors operate, agreeing clear delivery arrangements, meeting contractual and programme requirements, and proactively managing performance, subcontractors can establish themselves as trusted and dependable delivery partners.

Equally important is a commitment to continuous improvement. Seeking feedback, learning from delivery experience, and adapting ways of working can help strengthen relationships over time and demonstrate a proactive approach to partnership working.

Ultimately, the most successful contractor relationships are built on trust, professionalism, transparency, and a shared commitment to delivering positive outcomes for clients, residents, and programme stakeholders. Organisations that consistently demonstrate these qualities are more likely to secure future opportunities and become valued members of a contractor's supply chain.

Resources



Podcast: All RISE podcasts are available [here](#).

Podcast: "Retrofit from a contractor perspective" available [here](#).



Masterclass: All RISE masterclasses are available [here](#).

Masterclass "Contractor management" available [here](#).



Advice pack: All RISE advice packs available [here](#).

Advice pack: "Project Management for Retrofit Suppliers" available [here](#).

