

# Contractor Invite & Reminder Templates

Seven short messages for getting contractors and supervisors to use your compliance system. Each leads with the reason, asks for one action, gives a date and names a person to call. Replace the [square brackets], then send.

## 1 Invitation

Email or SMS

Send first, from the person the contractor already deals with.

**Subject:** Your [Client] record: about 10 minutes, once

Hi [Name], we are moving contractor records onto one system so you only enter them once and keep the profile for other clients. It takes about 10 minutes on a phone. Please finish by [date]. Questions: [name], [mobile].

## 2 Expiry reminder

Email or SMS

Tickets and licences at 60, 30, 14 and 7 days before expiry; insurance starts earlier, because insurers are slow. Change the wording at each stage.

**Subject:** Your [document] expires on [date]

Hi [Name], your [document] expires on [date]. Please upload the new one here: [link]. If your broker or registry is slow, tell us and we will note it.

## 3 Document sent back

Email

Every time a document is not approved. Give the reason and what would pass.

**Subject:** We could not approve your [document] yet

Hi [Name], we could not approve your [document] because [one-sentence reason]. What would pass: [for example, both sides of the licence, not a screenshot of the register]. Upload it here: [link]. Stuck? Ring [name] on [mobile].

## 4 At the gate

Spoken

Said by the supervisor when the record is not approved. The system says no, not the person.

The system shows your [item] expired on [date], so I cannot sign you in to work. I can sign you in as escorted for today if [site manager] approves, or you can upload the new one now and I will check. What suits you?

## 5 Thank you

Email or SMS

When the record is approved. One line.

**Subject:** Your [document] is approved

Thanks [Name], your [document] is approved until [date]. We will remind you [60] days before it runs out.

## 6 Escalation to the contractor's owner

Email

Second lapse, or insurance still missing at the last reminder. Write to the person who holds the contract.

**Subject:** Keeping [Company] cleared to work at [site]

Dear [Owner], [Company] has had [2] items lapse since [month]. From [date] the record stops your crew starting work at [site]. Could you nominate someone in your office to own renewals? I am happy to talk it through. [Name], [mobile].

## 7 Repeat-lapse conversation

Call, then email

Third lapse within 6 months. Said or sent by the manager who engaged the contractor.

**Subject:** Agreeing how we stop lapses

Hi [Name], [Company] has had [3] items lapse in the last 6 months. I would like to agree how we stop that. Two options: renewals uploaded 30 days early, or a named person in your office who owns them. Which suits you? I will note what we agree on your record.

Reminder timings are a suggestion, not a published standard. Use with the guide Getting Contractors & Supervisors to Actually Use Your Compliance System at [complyflow.com/blog](https://complyflow.com/blog).