



The Impact of
Service Reports
Partner Training Modules
Module Five

Primary Objective of the Workshop

1. Identify the reasons why Service Reports are an important component of Customer Satisfaction.
2. Include the proper level of detail in Service Reports.
3. Describe the critical elements of a Service Report.
4. Take additional steps to ensure Customer Satisfaction.

Before you conduct the workshop

1. Verify that the PowerPoint is loaded and ready to run.
2. If the workshop includes video and you are going to use it, verify the proper operation of the video.
3. Verify the printing of the workbooks & the availability of pens/pencils.
4. Check the room set up.

Facilitation Keys to Remember

1. Review the slides and key points.
2. Talk to the participants, not the screen.
3. When you ask a question, let participants answer.
4. Ask questions early on to get workshop participants immediately engaged.
5. The participants should talk 50% of the time.
6. Try to get most of the participants involved in the conversation.
7. When participants ask a question, repeat the question so that everyone hears it.



Slide 1 – Imperative 1

Introduce Module Five. This module will focus on identifying the importance of Service Reports in relation to Customer Satisfaction. The first imperative is to identify the reasons why Service Reports are an important component of Customer Satisfaction.



Slide 2 – Imperative 2

The second imperative is to include the proper level of detail in Service Reports.



Slide 3 – Imperative 3

The third imperative is to describe the critical elements of a Service Report.



Slide 4 – Imperative 4

The fourth and final imperative is to take additional steps to ensure Customer Satisfaction.



Slide 5 – Service Reports

Ask participants how many of them actually enjoy or look forward to filling out Service Reports.

For most professionals, writing reports is a necessary evil. What we're going to demonstrate in this module is how they are important to you, the company and your Customers.



Slide 6 – What's the Big Fuss?

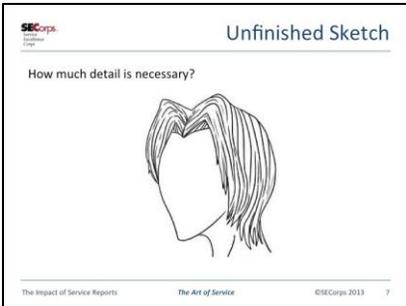
When you're out in the field running around, many of you may feel that you don't have the time to write a comprehensive Service Report, especially when you have another call waiting.

Ask participants why it is so important to ensure the Service Report you complete is comprehensive.

Discuss their answers. Emphasize the following:

- It's documentation, part of a historical record.
- Shows the Customer exactly what you did for them.
- Shows the company exactly what was done.
- Helps to justify our fees.
- It's an important legal record.

When it comes time to review, the Service Report is, literally, the only thing the customer can "get his arms around." The many Customer "pains" the company relieved or avoided throughout the year are forgotten, but the reports live on , for better or worse.



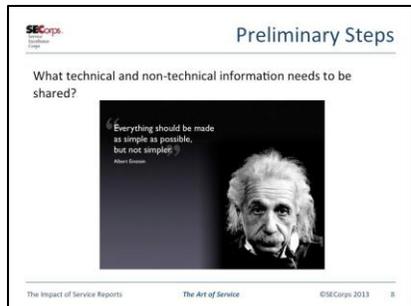
Slide 7 – How Much Detail Is Necessary?

Many of us operate under the theory that “less is more” when it comes to writing—but Imagine that while you were at work, you had some repair work completed on your household washing machine. When you returned home, your spouse presented you with the \$400 repair bill.

When you’re going to be paying that much money for any repair, you’re going to want to understand the justification for that charge – that means knowing the details of the job.

Imagine a Customer who has a \$25,000 agreement who, at the end of the year, reviews the paperwork. What do you think will happen if he/she pulls out a dozen or so pieces of paper and the only work described is “service completed”?

Imagine the Customer being asked by a new boss to show what they got for \$25,000. What do you think will happen when your Customer stands before his/her boss with a handful of paper full of sparse information? Could a cancellation be forthcoming? At best, your Service Manager has a lot of explaining to do.



Slide 8 – Preliminary Steps

Many people shy away from writing for fear of saying something wrong, something that might get them in trouble later on. Once it's written, you can't take it back. That's a legitimate concern. However, having "it" in writing saves far more trouble than it creates.

The Service Report is a mix of technical and non-technical information. You will be more non-technical for the Customer and more technical for the office.

Ask participants what technical and non-technical information needs to be shared.

Discuss their answers.

Emphasize the following:

- Reported problem
This is non-technical
- Actual problem
This is technical
- "Here's what I did"
Both non-technical (for the Customer) and technical (for the office)
- "Here's why I did it"
Repair vs. replacement considerations
- Follow-up required
Especially if it's an ongoing problem or an "iffy" fix
- Additional recommendations
Any other additional work you'd recommend.



Slide 9 – Writing Service Reports

Because we’re always pressed for time, we have a tendency to begin writing as soon as we pull out or pull up the Service Report form. However, there are some good reasons to think about what you’re going to write before you begin writing.

Ask participants why they should think before they write a service report.

Possible answers include:

- It’s your chance to communicate value to the customer.
- Think about how you want to phrase the problem and the solution.
- You are creating a permanent record.



Slide 10 – Know Your Audience

One of the most important things to think about before starting to write is who might eventually read the Service Report.

Ask participants who are all the individuals who might read any given Service Report you write?

Discuss their answers. Emphasize the following:

Will definitely read it:

- Customer
- Customer Service
- Service Manager

May possibly read it:

- General Manager
- Building owner
- Another Technician
- Customer Accounts Payable
- Company Accounts Receivable/Collectors
- At worst case, an attorney and/or judge.

All of these people have different information needs. To be safe, you should err on the side of writing too much rather than too little.



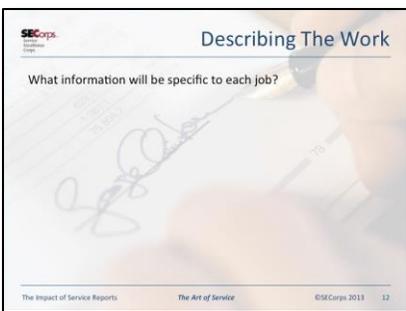
Slide 11 – Describing the Work

The first type of information we need is identified as “Preliminary Information,” which is the basic information recorded on every Service Report.

Ask participants what basic information must be initially recorded on every Service Report that they complete.

Discuss their answers. Answers may include:

- Job number
- Job name
- Job address
- Customer name
- P.O. number
- Problem



Slide 12 – Describing Specific Work

Ask participants what information will be specific to each job. Discuss their answers. Highlight the following:

- Identify what trouble or problems you corrected.
- Identify what trouble or problems you prevented. Write what might have happened if a failed control had not been replaced. This is information Technicians know as well as they know anything.
- Take the time and effort to pass it on to the Customer. The Customer doesn't really care about the controls but does care about having a compressor fail, which would have taken two days to replace, cost thousands of dollars and left the occupants without air conditioning in half of the building.
- Status of the work. If incomplete, state follow-up action required. Also, note the timeframe, if follow-up work is required.
- Current operating status of the equipment (or what is required for proper operation)
- Customer action required, if any.
- Customer signature (the report isn't complete unless the Customer signs it!).



Slide 13 – Ensuring a Satisfactory Report 1

Up to this point we’ve thought about what we needed to document before writing the actual Service Report. But that’s not necessarily the end of it. There are a couple of other steps we can take to ensure that the Customer is satisfied.

The first of these steps is to *write legibly*. There are those of you (and you know who you are!) whose handwriting is very difficult to read. You should take a few moments to print your report legibly so that that your Customer (and anyone else who reads it) can understand the report. If you are using an iPad or a hand-held device to enter your Service Report, make sure you include the detail needed.

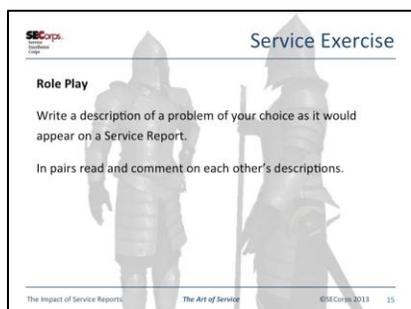


Slide 14 – Ensuring a Satisfactory Report 2

The other step is to *make a follow-up telephone call*, just to ask if everything’s OK. Why might this be important?

- Helps to reinforce your positive relationship with your Customer.
- Enables you to clear up misunderstandings on the report while the job is still fresh in your mind.

As we’ve hopefully shown, the Service Report is not needless busy work. It’s a critical piece of company documentation as well as a tool for customer satisfaction.



Slide 15 – Service Exercise

Give participants the Service Report form your company uses and have them individually write a description of a problem of their choice as it would appear on a Service Report.

Divide participants into pairs to read each other’s description.



Slide 16 – Service Exercise Review

Ask participants what they thought of their partner's description. Was it informative? Was it legible?

How could they improve upon their own Service Reports?

Discuss their responses.



Slide 17 – Questions

Time permitting; give workshop participants the opportunity to raise questions.

As much as possible, encourage other participants to answer the questions raised.