

Your Name: _____ Date: _____

If you don't document your jobs timely, correctly and thoroughly, what is the impact on:

Your Customer:

Your Supervisor:

The Warranty Department:

Your Dealership:

How does pre-planning benefit:

You:

Your Customer:

Your Dealership:

Pre-plan your next repair by completing each section below:

Context: what issue(s) has the customer reported? What questions do you need to ask to get a more clear picture?

What are all the parts you need to take with you to potentially make this repair?

What is the overall condition of the machine? How many hours has it logged? Are there any potential related repairs you should be prepared for?

Are there any other resources or documentation you might need on-site to help you troubleshoot?

What tools will you absolutely need to troubleshoot or repair this issue?

Are there any other questions you need to ask in order to be fully prepared when you arrive on the job site?