

Service Report Checklist

HAWTHORNE



While writing your report, check-off the following:

The 4 C's: Complaint, Cause, Correction, and Complications

- The Complaint
How the customer first described the problem
- The Cause *
The part that caused the problem, the part number, and *why* it failed*
- The Correction
The work you did (and Media Numbers) that resolved the complaint
- Resultant Damage
Describe any other damage that the failure may have caused
- Extra Time
If the job needed *extra* time, explain that time with short sentences

SIMS

- SIMS for every job
SIMS is not just for warranty codes. It must be completed every time
- Match with story
Your SIMS entry and the claims story (the failure) must match
- Populate every box
Only *one* part causing the failure is allowed for SIMS entry. (See "Root Cause" below) But *all* the fields and codes in SIMS must be filled-in
- Complete SIMS
Complete the SIMS and Service Report before getting into the next job

General Writing Tips

- *Define the real *Root Cause*
"Worn", "Cracked" and "Shorted" are not root causes. They are results. What caused the wear? Or the crack? Or the short? - Why did it happen?
Try: "Lack of lubrication," "Bending overload," and "Harness cut by debris". If you can't write "caused" after your root cause, then it isn't a root cause
- State only FACTS
- Use Bullet Points
Opinions can be argued. Facts cannot be argued
Bullet points make the facts easy to read
- Avoid long sentences
Long sentences can be difficult to understand. Break-up long sentences with a period wherever you naturally pause. (See "Read it out loud" below)
- Be clear and concise
- Do not accuse
Balance between too much and not enough information
Blaming an operator or owner in your service report is not "service." When a report contains facts, the responsibility becomes clear
- Avoid "I" and "we"
- Attach Files
Remove phrases like "We thought" or "I had to"
PSR's, photos, media numbers, emails, etc. Attach everything supporting the service you performed. *In your report, indicate there are attachments.*
- Reasons, not apologies
The hours and parts you needed were for good reasons. You are a Hawthorne Caterpillar professional. Avoid writing a report that sounds like an apology to the customer for "taking too long"
- Use Spell-Check
- Read it out loud
There is a spell check option within STW Service Report.
Discover long, awkward sentences by reading your report out loud. *Not in your head – out loud.* You might discover things that won't make sense to somebody else
- Ask yourself:
If you were the customer or CAT warranty, would you pay for this work?
- Complete the report
Complete your Service Report and place it in the completed folder, before moving to the next job