

Module 13: Attention to Detail

Goal: Learn to dot the i's and cross the t's, so every name, number, and file is right before it reaches a customer or a tech.

This lesson uses job titles like "the tech" or "the customer." No real people or companies are named.

Why This Matters to the Employer

One wrong digit can cost a whole trip. A tech drives to the wrong address. The wrong part shows up. A customer gets a bill with the wrong price, or no one calls them back because the phone number was off. Each small slip costs time, money, and trust. A desk person who catches errors before they go out is worth a lot to any trade company.

Your Tools Are Your Truck

A good tech keeps the truck stocked, clean, and organized. They know where every part is, and nothing is missing when they get to the job. At the desk, your tools are software and hardware. Treat them the same way.

- **CRM and dispatch software.** Keep customer records up to date. Merge duplicates. Close old tickets.
- **Email.** Use folders or labels. Don't let the inbox bury what matters.
- **Spreadsheets.** Clear column names, one row per item, no stray notes in random cells.
- **Computer.** Keep the desktop tidy and files named so anyone can find them.
- **Phone and headset.** Charged, working, and ready before the first call.
- **Printer and scanner.** Paper loaded, scans clear and right side up.

In plain words: If your tools are a mess, mistakes hide in the mess. Keep them ready, like a stocked truck.

Double-Check the Details That Matter

Some details cause the most trouble when they're wrong. Check these every time.

- **Names.** Ask how to spell it. Check the spelling in the record.
- **Addresses.** Street, unit or suite, city, and the gate or door to use.
- **Phone numbers.** Read them back digit by digit.
- **Dates.** Say the day and the date together, like "Tuesday the 14th."
- **Part numbers.** Copy them exactly. One wrong letter or digit is a different part.
- **Prices.** Match the quote, the work order, and the invoice.

Read It Back

Reading back is the easiest way to catch a mistake while the person is still on the line.

Part	What to read back	Example
Order	Each item, the part number, and how many	Two filters, part number read letter by letter
Appointment	The day, the date, the window, and the address	Tuesday the 14th, morning window, at the shop on Main Street
Contact	The name, the spelling, and the best number	Read the number back digit by digit

If the customer corrects you, fix it right then and read it back again.

Fill Every Field

Empty fields create questions later. The tech, billing, or the next desk person has to stop and ask.

- **Fill every required field** before you save the ticket.
 - **If you don't know something, say so.** Write "Not known yet, customer will call back" instead of leaving it blank.
 - **Don't guess.** A wrong answer is worse than a blank one. Ask, then fill it in.
 - **Use the same format every time,** so anyone can read your tickets.
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Attach the Right Files and Photos

A photo or a file can save a trip, but only if it's the right one.

- **Check the file before you attach it.** Right customer, right job, right version.
 - **Name files clearly,** with the customer, the job, and what it is.
 - **Make sure photos are clear** and show what the tech needs to see.
 - **Attach it to the ticket,** not just to an email that gets lost.
 - **Before you hit send, open the attachment** and make sure it's the right one.
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Examples Across Trades

- **Plumbing.** A customer needs a water heater replaced. Confirm the size and fuel type, and attach the photo of the data plate so the tech brings the right unit.
- **Electrical.** A contractor orders breakers for a panel. Read back the brand, the part numbers, and the count before the order goes in.

- **HVAC.** A tech needs a new motor. Copy the part number from the tech's photo exactly, then check it against the supplier's quote.
- **Fire protection.** An inspection report goes to a building manager. Check the building name, the address, and the date before you send it.
- **Restoration.** A claim needs photos of the damage. Attach the photos from the right job and the right rooms, labeled clearly.
- **Low voltage.** A crew is booked to install cameras. Confirm the site contact and the suite number so they get into the right space.

Catch Errors Before They Go Out

The best time to catch a mistake is before anyone else sees it.

- **Slow down on the details.** Move fast on the call, but take care with names and numbers.
- **Check it once more before you send it.** Read the ticket, email, or quote one more time.
- **Compare two sources.** The quote and the invoice. The order and the confirmation. The ticket and the customer's request.
- **If you find a mistake, fix it and tell the people affected.** (More on owning mistakes in Module 12.)

Do This, Not This

Instead of this...	Do this...
Write down a phone number and move on	Read it back digit by digit
Leave a field blank because you're not sure	Ask, or write what you know and what's still missing
Attach a photo without opening it	Open it, check it, and name it clearly
Type a part number from memory	Copy it exactly from the photo or the quote
Send a quote without checking the price	Match the price to the work order first
Let your inbox and desktop pile up	Keep your tools clean and organized

Example Scenario

EXAMPLE SCENARIO. No real people or companies.

A customer calls a plumbing company to book a repair.

Customer: I need someone to look at a leak under my kitchen sink.

Desk: I can help with that. Can I get your name and how you spell it?

The desk person types the name, then reads it back letter by letter. The customer corrects one letter.

Desk: Thanks for catching that. And the address?

The customer gives the address. The desk person asks about a unit number. There is one, and it was not in the old record.

Desk: Let me read that back. You're in unit B, and the best number is the one ending in four two. We have you down for Thursday the 9th, in the morning window. Does that all sound right?

Customer: Yes, that's right.

The desk person updates the customer record, fills every field on the ticket, and attaches the photo the customer texted of the leak.

What went right: The desk read back the name, address, number, and appointment. They caught a spelling error and a missing unit number before the tech ever left the shop.

Practice Scenario

Try this one on your own.

An HVAC tech texts you a photo of a part and asks you to order it. The part number in the photo is a little blurry. The supplier's site shows two parts with almost the same number.

Think about:

- What do you do before you place the order?
- Who can help you confirm the right part?
- What do you attach to the ticket?

One good answer: Don't guess. Text the tech back and ask for a clearer photo or for them to read the number to you. Check it against the model of the unit. Read the part number back to the supplier when you order. Then attach the photo and the order confirmation to the ticket.

Quick Tips

- Dot the i's and cross the t's.
- Double-check names, addresses, phone numbers, dates, part numbers, and prices.
- Read back every order and appointment.
- Fill every field. If you don't know, say so. Don't guess.
- Attach the right files and photos. Open them before you send.
- Catch errors before they reach a customer or a tech.
- Keep your tools clean, organized, and ready, like a stocked truck.

Quiz

1. A customer gives you a phone number. What's the best next step?

- a) Write it down and move on
- b) Read it back digit by digit
- c) Ask them to email it later

Answer: b. Reading back catches mistakes while the customer is still on the line.

2. You're booking an appointment. What should you read back?

- a) Just the time
- b) Just the customer's name
- c) The day, the date, the window, and the address

Answer: c. Say the day and the date together, and confirm where the tech is going.

3. A required field asks for the gate code, but the customer doesn't know it. What do you do?

- a) Write "Not known yet, customer will call back"
- b) Leave it blank
- c) Make up a code to fill the field

Answer: a. Write what you know and what's still missing. Never guess.

4. A tech sends you a blurry photo of a part number. What do you do?

- a) Order the part that looks closest
- b) Ask the tech for a clearer photo or to read you the number
- c) Wait until the tech is back at the shop

Answer: b. One wrong digit is a different part. Confirm it first.

5. You're about to email a quote to a customer. What's the last thing you check?

- a) The font
- b) Nothing, it looked fine when you wrote it
- c) The customer's name, the price, and the attachment

Answer: c. Check it once more before you send it. Open the attachment to make sure it's the right one.

6. How is the desk like a tech's truck?

- a) Your tools need to be clean, organized, and ready
- b) You both drive to jobs
- c) It isn't. Only techs need to stay organized

Answer: a. Your software and hardware are your tools. Keep them ready.

7. You find out the invoice price doesn't match the quote. What's the best move?

- a) Send it anyway and fix it later
- b) Check the work order, fix the error, and tell the people affected
- c) Delete the quote

Answer: b. Catch errors before they reach the customer, and own the fix.