

Module 14: Input, Process, Output

Goal: Learn to get complete information in, put it together, and send it out ready to use, so the next person can do their job without stopping to ask.

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

Why This Matters to the Employer

Every job at a trade company moves from person to person. The customer tells the desk. The desk tells dispatch. Dispatch tells the tech. The tech tells billing. If one handoff is missing a detail, everyone after it has to stop, call back, and wait. A desk person who gets the full picture in, and sends the full picture out, keeps the whole job moving.

The Three Steps

Think of your work in three steps.

Part	What it means	Example
Input	Get the information you need from someone else	A customer calls about a leak
Process	Put the information from different sources together	You add the address, the equipment, and the open ticket
Output	Package it and send it to the next person	Dispatch gets a complete ticket, ready to assign

In plain words: Get it in complete. Put it together. Send it out ready.

Input: Ask for What You Need First

The best time to get complete information is before someone hands it over.

- **Tell them exactly what you need**, before they start. "To get this scheduled, I'll need your address, the best number, and what the unit is doing."
- **Ask for it in one go**. One clear list beats five follow-up calls.
- **Use the same checklist every time**, so nothing gets skipped.
- **Check it before they leave**. Read it back while they're still on the line.
- **If something is missing, say so now**. It's easier to ask today than to chase it later.

Process: Put the Pieces Together

Information comes from more than one place. Your job is to bring it together.

- **The customer.** What's wrong, where they are, and when they're home.
- **The tech.** What they found, what they did, and what they still need.
- **The vendor.** Part numbers, prices, and when the part will arrive.
- **The software.** Customer history, equipment on file, open tickets, and past invoices.

Line it all up in one place, usually the ticket. Look for gaps and anything that doesn't match. If the customer says one model and the record says another, find out which is right before you move on.

Output: Package It Before You Send It

Before you pass something on, make it complete.

- **Find out what the next person needs.** Ask dispatch, the tech, or billing what they look for. Then give them that, every time.
- **Put it all in one place.** One ticket or one message, not pieces spread across texts and emails.
- **Lead with what matters most.** The address, the problem, and anything urgent go at the top.
- **Attach what they'll need.** Photos, quotes, part numbers, and approvals.
- **Read it as if you were them.** Could you do the job with only what's here? If not, add what's missing.

The Cycle Keeps Going

Your output becomes the next person's input. The ticket you send dispatch is what dispatch starts with. The notes the tech writes are what billing starts with. When each person sends out complete work, the next person starts strong.

In plain words: Give the next person the kind of handoff you'd want to get.

Trade Example: A Service Call from Start to Finish

A homeowner calls an HVAC company because the air conditioning stopped working.

- **Intake.** The desk asks for everything up front: name, address, best number, what the system is doing, the make and model if they know it, and when someone can be home. The desk reads it all back.
- **Dispatch.** Dispatch gets a ticket with the address, the problem, the equipment on file, and the open window. They assign the right tech without calling anyone.

- **Tech.** The tech arrives knowing the equipment and the problem. They replace a part and write what they found, what they did, and the part number used.
- **Billing.** Billing gets the tech's notes, the part, and the approved price. The invoice goes out right the first time.

At each step, one person's output was the next person's input.

Quote and Purchase Example

A customer asks for a quote to replace a water heater.

- **Input.** The desk asks for the size, the fuel type, and a photo of the data plate before sending anything to the estimator.
- **Process.** The estimator's labor price, the vendor's part price, and the customer's details come together in one quote.
- **Output.** The customer gets a clear quote with the price, what's included, and how to approve it.
- **The cycle continues.** Once approved, the purchase order goes to the vendor with the exact part number and the delivery address. The tech gets the job with the part already on the way.

Do This, Not This

Instead of this...	Do this...
Take whatever the caller gives you	Tell them what you need before they start
Call the customer back three times for missing details	Ask for everything in one go
Keep the tech's notes in a text and the price in an email	Put it all on the ticket
Forward a message as is	Add what's missing, then send it
Guess what billing needs	Ask billing what they look for

Example Scenario

EXAMPLE SCENARIO. No real people or companies.

A property manager calls an electrical company about lights out in a hallway.

Desk: I can help with that. To get a tech out, I'll need the building address, the unit or floor, a contact on site, and how to get in.

Customer: It's the third floor hallway. The site contact is the maintenance lead, and the door code is on file.

The desk person checks the software. The door code on file is old. The desk asks for the current one and gets it.

Desk: Let me read that back. Third floor hallway, the maintenance lead is your site contact, and here's the new door code. Is that right?

Customer: Yes.

The desk person puts it all on the ticket, marks the old code as replaced, and sends it to dispatch.

What went right: The desk asked for everything up front, caught an old door code by checking the software, and sent dispatch a ticket they could use right away.

Practice Scenario

Try this one on your own.

A plumbing tech finishes a job and texts you, "Done. Replaced the valve. Bill them." Billing needs the parts used, the labor, and the customer's approval before they can send an invoice.

Think about:

- What's missing from the tech's message?
- Where else can you find the information?
- What do you send billing?

One good answer: Text the tech back and ask for the part number and what they found. Check the ticket for the approved quote. Put the tech's notes, the part, the labor, and the approval on the ticket, then send it to billing as one complete package. Next time, tell the tech up front what billing needs.

Quick Tips

- Tell people what you need before they hand it over.
- Ask for everything in one go, then read it back.
- Bring together what the customer, the tech, the vendor, and the software tell you.
- Look for gaps and anything that doesn't match.
- Find out what the next person needs, and give them that.
- Package it in one place before you send it.
- Your output is the next person's input.

Quiz

1. A customer calls to book a repair. What's the best way to start?

- a) Let them talk and hope they cover everything
- b) Tell them what you need to get it scheduled
- c) Ask them to email the details later

Answer: b. Telling people what you need up front gets you complete information the first time.

2. What does "process" mean at the desk?

- a) Putting information from different sources together
- b) Sending a ticket as fast as you can
- c) Waiting for someone else to fill in the details

Answer: a. You combine what the customer, the tech, the vendor, and the software tell you.

3. The customer says one model, but the record says another. What do you do?

- a) Use the one in the record
- b) Use the one the customer said
- c) Find out which is right before you move on

Answer: c. Look for anything that doesn't match, and fix it before you pass it on.

4. Before you send a ticket to dispatch, what should you ask yourself?

- a) Is it long enough?
- b) Could they do the job with only what's here?
- c) Did I use the right font?

Answer: b. Read it as if you were them, and add what's missing.

5. How do you know what billing needs?

- a) Ask billing what they look for
- b) Guess
- c) Send everything you have and let them sort it out

Answer: a. Find out what the next person needs, then give them that every time.

6. A tech texts, "Done. Bill them." What's the best move?

- a) Forward the text to billing
- b) Wait for billing to ask
- c) Get the missing details, then send billing one complete package

Answer: c. Package it before you send it, so billing doesn't have to chase anyone.

7. What does "the cycle keeps going" mean?

- a) The same customer always calls back
- b) Your output becomes the next person's input
- c) You do the same task over and over

Answer: b. Each handoff starts the next step, so complete work helps everyone after you.