

Closing Work Orders Correctly

Field-Service Coordinator Micro-Training

Portfolio Sample #4

Professional PowerPoint / Instructional Presentation
Fictional demonstration sample - no client materials used

Learning goal
Close tickets only when status, notes, proof, and exceptions are complete and consistent.

Human-QA emphasis
Instructional clarity, workflow logic, applied examples, knowledge check, and job-aid readiness.

Audience & Objectives

Audience

New or developing field-service coordinators responsible for reviewing completed tickets before administrative closeout.

Design note

The training is built around observable behavior, not just policy recall.

By the end, the learner should be able to:

- Identify a release-ready work order.
- Spot unclear, incomplete, or contradictory closeout notes.
- Route exceptions to the correct next step.
- Write notes that support billing, reporting, and customer follow-up.

Why closeout quality matters

Unclear notes

Missing proof

Wrong status

Missed exception

can create...

Customer confusion

Billing delays

Poor accountability

Repeat calls

Trainer emphasis: a work order is not complete merely because the work was done. The record must also explain the outcome clearly enough for the next user.

Closeout workflow



Quality gate: Do not close if the ticket cannot explain what happened without a follow-up phone call.

Common defects to catch

Vague note

—————→ “Done,” “fixed,” or “checked” with no useful detail.

Missing proof

—————→ Photo, signature, time entry, or attachment required but absent.

Status conflict

—————→ Ticket says Complete while notes say parts or return visit needed.

Unrouted issue

—————→ Complaint, damage, access issue, or safety concern not escalated.

Reviewer rule

If it affects billing, customer communication, safety, or future work, it must be documented or routed.

Before and after: completion notes

Weak closeout note

"Fixed sink."

Problem: action, location, evidence, and outcome are unclear.

Improved closeout note

"Replaced restroom faucet cartridge, tested hot/cold water flow, cleaned work area, and confirmed no visible leak after testing."

Result: clear, auditable, and useful to the next user.

Teaching point: the improved version tells the reader what was done, where it happened, how it was verified, and whether the issue remains.

Knowledge check

- 1 A ticket says Complete, but the only note is “done.” What should you do?
- 2 What two items must agree before a ticket is release-ready?
- 3 When should a ticket be escalated instead of closed?

Answer focus

Return incomplete documentation, match status to notes/proof, and escalate customer-impact or unresolved issues.

Final job-aid checklist

- ✓ Status is specific
- ✓ Notes answer the service request
- ✓ Required proof is attached
- ✓ Exceptions are routed
- ✓ Billing/reporting can rely on the record
- ✓ Customer-impact items are visible

Release-ready standard
A knowledgeable reviewer can understand the service outcome without calling the technician for basic facts.

End of demonstration sample