

FIELD CLOSEOUT

The truck leaving the driveway is not the same thing as the workflow being done.

A simple, reusable operating tool for teams that want clearer handoffs and less status chasing.

Use this on one real workflow

- ☐ Diagnosis documented
- ☐ Work performed documented
- ☐ Equipment/model/serial captured when relevant
- ☐ Photos/measurements attached where useful
- ☐ Parts used / parts needed recorded
- ☐ Customer approval/disposition captured
- ☐ Warranty/maintenance-plan implications noted
- ☐ Return visit created if required
- ☐ Invoice-ready status confirmed
- ☐ Next customer communication assigned if unresolved

Design notes

- Closeout fields should match billing, warranty, callback, and parts workflows.
- Do not require essay-length technician notes if structured fields can carry the information.
- Make incomplete closeout visible before the call disappears into yesterday's schedule.

How to use it. Do not complete this from memory in a conference room. Pull up one active or recently completed record and test the checklist against what actually happened. Any item that repeatedly needs a text, a side spreadsheet, or an owner stepping in is a candidate for workflow redesign.

Want a real answer for your workflow? Book a free 30-minute Workflow Assessment at bradleyhankins.com/contact.