

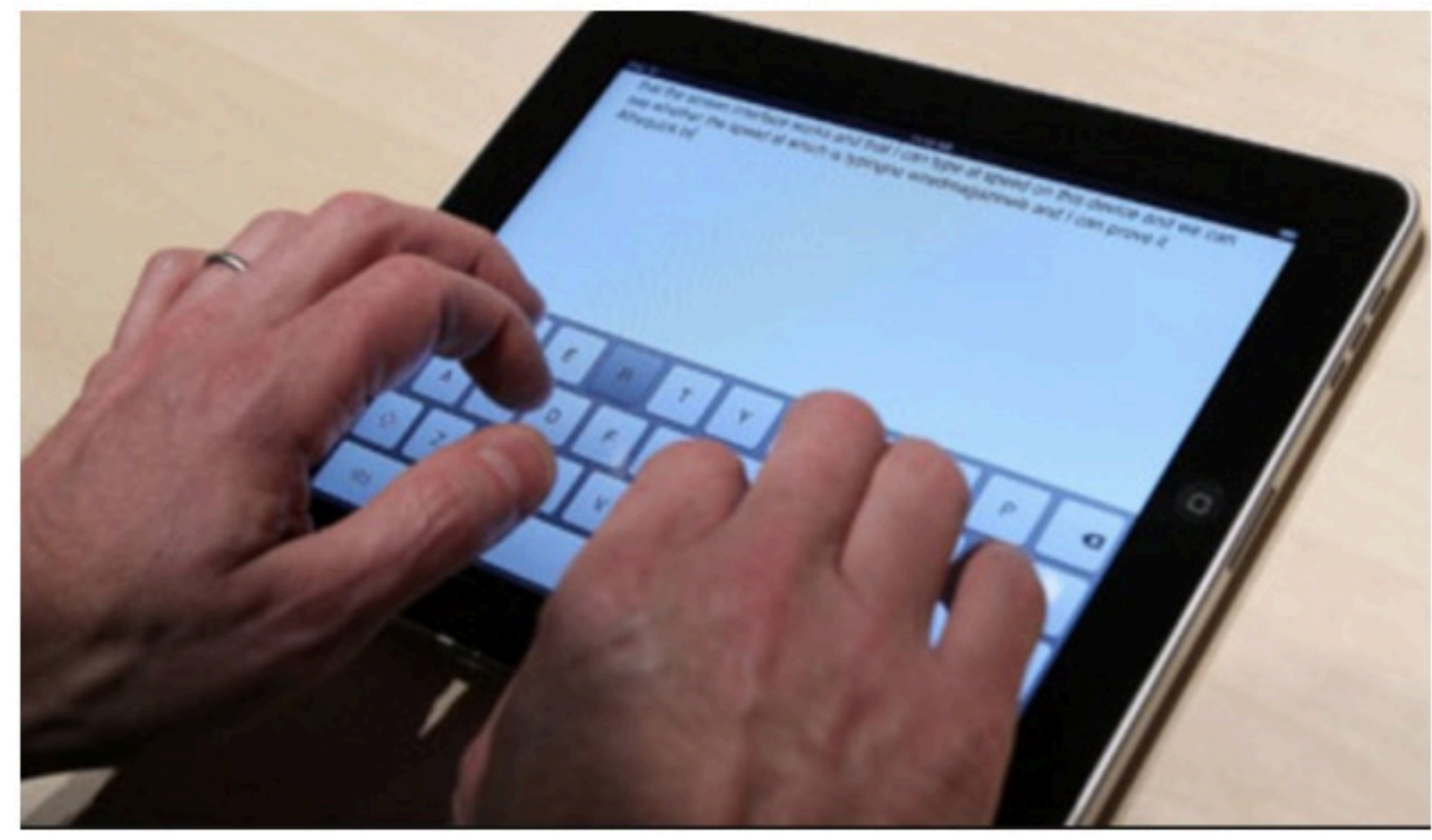


Progress: 

Documenting Customer Interactions	
Introduction	✓
Overview	✓
The Importance of Good Notes	✓
Components of Clear, Concise Notes	✓
Examples: Good Notes and Poor Notes	✓
Exercise 1: Writing Clear Concise Notes	⌕
Exercise 2: Writing Clear Concise Notes	⌕
Exercises 1 and 2 - Key	✓
Quiz	⌕
Summary	✓
Course Evaluation	⌕

Documenting Customer Interactions

Introduction



Course Description

The Documenting Customer Interactions course describes the impact of both good and poor case notes on service metrics and teaches technicians how to write clear, easily understood notes that can be used effectively as part of a repair and its history.

This course is part of the Apple Service Fundamentals curriculum and is used to prepare for the Apple Service Fundamentals Exam (SVC-16A).



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Documenting Customer Interactions

Overview

Lesson Objectives

After completing this course, you should be able to:

- Describe the impact of poor notes on the repair cycle and customer satisfaction.
- List the components of clear, concise and complete case notes.
- Identify and correct the errors in sample technician notes.

Audience	Prerequisites	Time Required	You will need...
 Service Technicians	 None	 35 minutes	 No additional materials or equipment



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Documenting Customer Interactions

The Importance of Good Notes

The Value of Good Notes

Case notes are the remarks and recommendations technicians make during troubleshooting. They describe what the customer said, list what tests have been run, and what the results were. Notes also detail the results of a physical examination and diagnostics and may include a suggested resolution.

Writing clear, sufficiently detailed case notes can be challenging when you are busy, multitasking, or when the customer seems in too much of a hurry to give you the details you need. Still, good notes are essential to service excellence for the following reasons:

▶ **Good Notes:**

The Negative Impact of Poor Notes

Turnaround Time and CSAT (Customer Satisfaction) are affected by poor notes. Confusing instructions or lack of detail cost repair time and customer goodwill. Imagine if technician A had written the following notes then went to lunch, leaving you to complete the repair:

- *Symptom: iPhone will not work*
- *Steps to Reproduce: Hit power button- will not turn on*
- *Repair Notes: Cosmetic Condition is OK*

It is as though technician A never worked on the repair! You have so little information you will have to start the whole troubleshooting process again. This is a great waste of time and is frustrating for the customer who is waiting to get the device back.

Technicians are on the the front lines, and are the first to see repair issues with Apple products. Good case notes can help Apple respond to new issues quickly and provide a solution for your customers. Apple also wants to know what tools you use to isolate and resolve issues so they can continue to provide resources that are useful to you.



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Documenting Customer Interactions

Components of Clear, Concise Notes



Good notes describe completely the customer interaction and your subsequent actions. What information did the customer supply? What did the customer see or hear or smell? Has she ever seen this happen before? How was the issue verified? What tests/checks were run and what were the results? What information did the device itself supply? What resolution was reached or do you recommend?

When answering these questions in your notes:

- Write out full sentences and descriptions. For example: "The hairline crack runs the entire length of the iPhone screen from top to bottom." *NOT* "Hairline crack, full length."
- Use declarative phrases. For example: "The home button is missing." *NOT* "The home button seems to have disappeared somehow."

▶ [Click here to see the other components of clear, concise case notes:](#)



In legal proceedings courts often interpret language literally, so make clear distinctions between supported facts and customer allegations as you write objectively about the service and support. Use the customers' own words, not your interpretation of them.



Progress: [Progress bar with 10 segments, 10th segment filled]

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Documenting Customer Interactions

Examples: Good Notes and Poor Notes



Technician A wrote:

- *Symptom: Broken iPhone*
- *Steps to Reproduce: Observed*
- *Repair Notes: Cosmetic Condition is fair - a few scratches - screen needed cleaning 'cos full of fingerprints*
- *Customer really ticked off - Better get this guy a phone fast before he has a meltdown*

These notes are less than helpful.

- What does "broken iPhone mean? How is it broken - is there a hardware issue, liquid damage, a software issue?
- Is the issue really with the device or is this an educational opportunity?
- The word "observed" cannot substitute for the steps taken to reproduce the issue.
- The cosmetic condition need not include descriptions of fingerprints on the screen- this is not part of any issue.
- The customer seems frustrated- but the "meltdown" prediction is judgmental and unnecessary.



Here is technician B's much better version of the notes:

- Symptom: iPhone won't power up.*
- Steps to Reproduce:*
- *The unit did not turn on initially*
 - *I plugged it in to power adapter and got the Apple logo*
 - *I charged it for a few minutes*
 - *I then connected to iTunes on the store's Mac*
 - *The phone was detected in iTunes*

Repair Notes:

- *Cosmetic Condition: No apparent evidence of damage. Normal-use scuffs on the bottom case. Display is aligned properly. No blemishes on display glass.*
- *It appears the device was not fully charged. After using a known good power adapter, the device charged up and was recognized in iTunes after connecting to a known good Mac. Currently setting up a repair to replace the customer's power adapter as it has been found to be faulty.*

These stepped, descriptive notes are well organized and the issue and its resolution are easy to understand.