FREE WORKSHEET FOR SERVICE TECHNICIANS

Three-Call Debrief

Pick three recent calls where the customer hesitated, deferred, or declined. Answer the same three prompts for each call. **A phrase or two per box is enough.** Then write down the pattern you notice and one change to try next.

Name _____ Week of _____

	Call 1 ☐ Hesitated ☐ Deferred ☐ Declined	Call 2 ☐ Hesitated ☐ Deferred ☐ Declined	Call 3 ☐ Hesitated ☐ Deferred ☐ Declined
1 What was the customer still unsure about when I presented the options?			
2 What did they say or do that makes me think that?			
3 What could I do differently next time to help them decide?			

One action

THE PATTERN I NOTICED

_____

_____

_____

ONE CHANGE I'LL TRY ON MY NEXT CALL

_____

_____

_____

Spot a recurring issue you need help with? Bring this worksheet to your service manager.