

1 **Work Description Guidelines**

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2 **Purpose**

- To provide philosophical and practical guidelines to Weston employees on how to write their narrative work descriptions.

3 **Topics**

- Weston Invoice
- General Tone
- Do's and Don'ts
- Examples

4 **Weston Invoice**

- Everything we write in the work description of our work tickets ends up on a customer invoice.
- The number of hours and the financial charge are adjacent to each work description.
 - Explicit value presented to the customer for each task you work on.
"here's what I wrote" 4.00 hrs \$ 300.00

5 **AutoTask**

- Work Description becomes the narrative.
 - Note that Ticket Title, Ticket Description, Internal Notes, and Additional Email Text do NOT appear on the TWG invoice to the customer.
 - Work Description should be an intelligent description of the service performed for the client.
 - e.g. 'Performed X on *project Y*.'
 - e.g. Work on duplicating the payment summary report in SQL for the Monthly Payment Report.

6 **Invoice Example**

7 **General Tone**

- Concise, professional description of the work performed for the client.
- Substantive without being story-telling.
 - Not so vague that only you know what you've done.
- Read your narrative as if YOU were getting the BILL
 - Generally, the size of the narrative should match the amount of money (hours) billed.

8 **Do's and Don'ts**

9 **Do's**

- Focus on the value you delivered to the client rather than the difficulty (or ease) of the task.
- Include the first and last name of any client contacts who you worked with on the task for documentation.
- Keep the description brief, professional, and to the point.
- The client (or your supervisor) should generally be able to read your description and then independently check your work.

10 **More Do's**

- Spelling counts – check it.

- www.spellcheck.net – online web form
- www.iespell.com – IE Plug-in
- Use action words and phrases.
- Use past tense.
 - Customer will not be reading it until next month.

11 Helpful Words

1

- Investigated
- Configured
- Assisted
- Responded
- Remediated
- Deconflicted
- Troubleshoot

2

- Created
- Developed
- Built
- Added
- Updated
- Facilitated
- Coordinated

12 Common Misspellings

- The correct spellings are below
 - receive, received
 - In English, use “I” before “E” except after “C”
 - queue
 - when referring to a printing queue, or a line of people

13 Common Grammar Mistakes

- Using “troubleshooted” (sic)
 - There is no such word. Use “troubleshoot” for past tense.
- “Remoted”
 - The word remote is not a verb. Instead use “Remotely accessed ...”
- “Conferenced Dell ...”
 - Instead use “Conference call with Dell ...”

14 Don'ts

- Storytelling
 - Do not write a story or literary narrative in ticket notes.
 - “in the beginning there was the Heaven and the Earth”
 - Focus on what VALUE was delivered. Not on how you did it or how you felt about doing it.
- Forward-looking Statements
 - e.g. “Will check on it tomorrow.”
 - If you check on it tomorrow, bill the time then and enter a description of how you checked it.

15 Don'ts II

- Administrative Time
 - Do not bill the client for administrative time like
 - Finding someone to work on a project

- Leaving a voicemail for the client
- If you spent significant time adding value for the client, write a description focused on that value, not the administration of that value.
- Ridiculously Low Value
 - Do not write work descriptions that are ridiculously low value.
 - e.g. "Opened a box."

16 List of Common Errors

1. Spelling Error
2. Grammatical Error
3. Missing client contact's first and last name.
4. Storytelling: excessive narrative on activity rather than value delivered
5. Storytelling: excessive background information
6. Storytelling: activity internal to TWG
7. Forward-looking statement
8. Insufficient Detail: activity cannot be independently identified and verified
9. Administrative Time
10. Ridiculously Low Value

17 Examples

18 Bad Examples

- "Glenda called to say user now has access."
 - *Glenda who? Sounds like Glenda should be sending us her bill, not the other way around.*
- "System's network card is having trouble."
 - Master of the obvious. That's why the customer called us.
- "Checked on the Area code in system. The area code is not list in the ARS. Support line is down and will need to be reset to allow for support to add the area code."
 - Three sentences to say 'investigated the area code'.

19 More Bad Examples

- "Put new program on doctor's computer."
 - So vague that no one will remember which computer and what software in a week. Better would be: "Installed WinXP on Dr. Robert Baker's laptop."
- "First I installed a printer that Sally told me about. Then I turned on her computer and formated her hard drive. After that I talk to her and found out about the SQL problem, so I went back to the office to tell my boss to forward the issue to software development."
 - Storytelling and discussion of internal TWG activity.

20 Unfortunately More Bad Examples

- "Tried to contact user Billy Bob, looked up user's contact information and left voicemail."
 - Administrative time & Ridiculously Low Value
- "Stopped by Insurance Department but user Tony had already fixed the problem."
 - Ridiculously Low Value

21 Good Examples

- "Work on the Transaction and Payment summary reports to insure that the data is correct after adding the SPCD and 333 adjustment codes."

22 Good Example 2

- "Worked on imaging solution for Citrix servers. Built Boot disk and created new images of servers."

23 Good Example 3

- “Added NPI and TPI fields to VOB web form. Revised Account Mgt web pages to facilitate data entry and storage of Facility NPI values.”

24 **Questions?**