THE RESULT

Before the refresher: 22 technicians with expired lift certificates closed lift jobs in the month to December 4.

The Head of Field Service Training at a 45,000-person building services company prepares the VP Service's readiness page, with any AI chat his company allows.

THE RESULT Daniel's one page for Karen. Fictional company.

CINDREL BUILDING SERVICES · FIELD SERVICE TRAINING

Technician readiness, December

For: Karen Holt, VP Service

Data: certificates and dispatch to December 4

WHERE IT STANDS

22 technicians whose lift certificate had expired by December 4 closed lift jobs from November 5 to December 4 (17 Northern Europe, 3 North America, 2 Asia Pacific). Lift work needs a valid certificate. Whether each had expired on the job date isn't shown; HSE confirms. · Inputs 2, 3

BY REGION (LIFT CERTIFICATES ONLY)

Northern Europe	North America	Southern Europe	Asia Pacific
Not ready	**Unknown**	**Renewals booked**	**Unknown**
31 expired; 17 closed lift jobs	3 expired closed lift jobs; update says on leave	0 on lift jobs; 6 expired, plan not stated	14 of 52 branches not in the data

WHAT HAPPENS NEXT

TODAY	**The 22 go to HSE** Expired means no lift work until renewed. HSE checks job dates and whether completed jobs need rechecking. · Inputs 2, 3
BY FRIDAY	**Renewal dates for 105 certificates expiring by December 31; data for Asia Pacific's 14 missing branches** Only Southern Europe says its renewals are booked. · Inputs 2, 7
REFRESHER	**Don't approve the €1.1M on current evidence; keep it open** Northern Europe, November: 95 of 180 complaints are response time, 20 quality of work. 3 of 18 ride-alongs needed K7 coaching. Ask: how many technicians work on K7 units? · Inputs 4, 5, 6
NOT COVERED	**HVAC readiness: the data covers lift work only** · Input 2

CAUGHT ON REVIEW

1. **22 technicians** with expired lift certificates **closed lift jobs** in the month to December 4
2. Only **20 of Northern Europe's 180 complaints** are about quality of work
3. **Asia Pacific is missing 14 of 52 branches**, so it's unknown, not fine

UC-001 · SC-20 · REV A	
FOR **Head of Field Service Training**	SECTOR **Building services (lifts, HVAC)**
COMPANY **45,000 people · 200 branches · 20 countries**	TASK **Report technician readiness, answer a refresher request**
WRITTEN FOR **ChatGPT · Claude · Gemini · Copilot**	
AI TEST **Claude, Nov 14, 2026 · 7 of 7 found**	

STEP 0 · THE MESS

What landed on Daniel's desk

A short email from the VP Service, a certificate export, a dispatch check, complaints by category, ride-along notes, a regional manager's request and three upbeat regional updates. Two lists have to be put side by side.

EMAIL · VP SERVICE [1]

Thursday's page

“Are our technicians ready for winter … Tell me whether we should fund their refresher.”

1 **Two questions.**

CERTIFICATE EXPORT [2]

December 4

Expired: 12, 31, 6, 9 … Asia Pacific covers 38 of its 52 branches.

2 **Who's missing?**

DISPATCH CHECK [3]

Service operations

Expired certificate … closed at least one lift job: 3, 17, 0, 2.

3 **Put it beside [2].**

COMPLAINTS [4]

November by category

Northern Europe: 180. Response time 95 … Quality of work 20.

4 **Which can training fix?**

RIDE-ALONG NOTES [5]

Northern Europe

3 rated needs coaching, all on the new K7 … the part needed was not on the van.

5 **Small and specific.**

TEAMS · REGIONAL MANAGER [6]

Refresher

“The 3-day refresher for all 1,120 technicians, about €1.1M.”

6 **All 1,120?**

REGIONAL UPDATES [7]

Three regions

“All green … we assume they're fine too.”

7 **Says who?**

YOU'RE NOT ALONE

25%

of total service cost goes on failed visits at the median service organization, in one vendor's benchmark.

Aquant, 2026 Field Service KPI Benchmark Report, February 2026 (161 service organizations, nearly 30 million service events). Aquant sells service software. Source

STEPS 1–3 · HOW IT WORKS

Three steps, one chat

Here the AI turns seven scattered inputs into one readiness page. The prompt makes it put two lists side by side.

1 Open a new chat

Use the AI tool your company approves: ChatGPT, Claude, Gemini or Copilot.

2 Paste the prompt and the inputs

Copy the prompt and the seven fictional inputs from the appendix into one message.

3 Check the two lists yourself

Put the certificate export next to the dispatch check, and the request next to the complaint categories. Then decide who verifies the safety question.

THE PROMPT, PART BY PART

COPY-READY VERSION IN THE APPENDIX

I'm Head of Field Service Training at a building services company (elevators and HVAC). Each month I send our VP Service a one-page update on technician readiness by region. This month she also wants a view on one region's request for a refresher programme. The page is due Thursday, December 10. Today is Monday, December 7. Below are her email, our lift safety certificate export, a dispatch check from service operations, November's customer complaints, ride-along notes, a message from the regional manager who wants the refresher, and the regional updates.

1 Who you are, who reads the page, when it's due and today's date.

Please draft the page:

1. **The headline**: are our technicians ready, in two sentences.
2. **Each region**: ready, not ready or unknown, with the input that shows it.
3. **Anything that needs action this week**, and who has to decide it.
4. **The refresher request**: does the evidence support it, and what would you ask before deciding?
5. **What's missing** from the inputs.

2 Five parts: headline, each region, action this week and who decides, the request, and what's missing.

Check every certificate claim against who was actually sent to lift jobs, and check whether each kind of complaint is something training could fix. Don't add facts that aren't in the inputs; if you assume something, say so. Name the input for each point.

3 The heavy lifting: check every certificate claim against who was actually sent to lift jobs, and each kind of complaint against what training could fix. In this run it found all seven planted problems.

WHERE TO PASTE

Every tool has one message box. Paste the prompt, add a blank line, paste the inputs, send. Exports can be attached as files if your tool allows it.

SAFE TO TRY

Practise with the fictional inputs first. Real certificate records, dispatch data and complaints include personal and customer information: use only your company's approved tool and follow its data rules.

THE AI'S FIRST ANSWER

What Claude actually wrote

Exactly as it came back, not edited. Read it the way Daniel did: check each point against the source it cites.

UNEDITED Claude · fresh session, no other context · Nov 14, 2026 · one run

Technician readiness: monthly update for Karen Holt, VP Service C: one page

Draft for Thursday, December 10. Prepared by Daniel (Head of Field Service Training). Figures are from the inputs numbered [1] to [7].

1. Headline

We can't confirm that technicians are ready for winter in any region except Southern Europe. The biggest risk is a safety and compliance gap, not a training gap: 22 technicians whose lift certificates had expired by December 4 closed lift jobs in the month before, 17 of them in Northern Europe [2][3]. The Northern Europe complaint figures point mostly to staffing and parts problems, not skills [4][5]. On the current evidence I don't recommend funding the €1.1M refresher. I'd keep the request open until the questions in section 4 are answered.

2. Region by region

Region	Status	What shows it
Northern Europe	**Not ready**	31 expired and 22 expiring by Dec 31, out of 1,120 [2]. 17 technicians with expired certificates closed lift jobs between Nov 5 and Dec 4 [3]. This contradicts Henrik's "certifications are all in good shape" [6]. Its expired rate is 2.8% (31/1,120), against about 0.6% to 0.65% in the other regions [2]. found
North America	**Unknown**	The update says "all green" and that the 12 expired are on leave or in office roles [7]. But 3 technicians with expired certificates closed lift jobs in the last month [3], so at least some of the 12 were working on lifts. Another 40 expire by Dec 31 and no renewal plan is mentioned [2][7]. found
Southern Europe	**Ready, with one open point**	0 expired technicians on lift jobs [3]. Renewals are booked for everyone expiring in December (18) [2][7]. Open point: the update doesn't say what is happening with the 6 already expired [2]. Also, "booked" is not the same as renewed.
Asia Pacific	**Unknown**	The export covers only 38 of 52 branches [2]. The other 14 are "assumed fine" with no data behind that [7]. In the 38 branches covered, 2 expired technicians closed lift jobs [3], so "all fine" [7] isn't accurate even for those. Another 25 expire by Dec 31 [2]. found

3. Action needed this week

1. **Expired technicians on lift jobs (22 people: Northern Europe 17, North America 3, Asia Pacific 2) [3].** Before anyone is treated as non-compliant, confirm whether each certificate had already expired on the date of the job. The check matches certificate status on December 4 against jobs from November 5 to December 4, so some of these certificates may still have been valid when the work was done [3]. Anyone still working on lifts with an expired certificate should stop lift work until they're renewed, since a valid certificate is required [2]. found *Who decides:* the regional service managers (Henrik Dahl for Northern Europe [6]), with Karen Holt's backing. The inputs don't name a safety or compliance owner. If one exists, they should confirm the stand-down and decide whether any completed jobs need rechecking. A: HSE verifies
2. **Certificates expiring by December 31 (105 in total: North America 40, Northern Europe 22, Southern Europe 18, Asia Pacific 25) [2].** Only Southern Europe says renewals are booked [7]. North America, Northern Europe and Asia Pacific should confirm booking dates this week. Otherwise the expired count goes up in the busiest season. found *Who decides:* each regional service manager.
3. **Asia Pacific's 14 missing branches [2][7].** Ask Asia Pacific for a manual certificate list from the old HR system. "We assume they're fine" isn't a status. *Who decides:* the Asia Pacific regional lead (not named in the inputs).

4. The Northern Europe refresher request

Does the evidence support it? Not as proposed.

- **Most complaints aren't skills problems.** Of Northern Europe's 180 November complaints [4]: found
  - 95 (53%) are "response time / no technician available". That's capacity or dispatch, and training won't fix it.
  - 50 (28%) are repeat visits. The ride-along notes say that in most repeat visits they saw, "the part needed was not on the van" [5]. That's parts and van stock, not skills. (These are the field quality team's observations, not a count, so the exact share is unknown.)
  - 20 (11%) are quality of work. This is the only category training could plausibly fix.
  - 15 (8%) are billing and other, which is not a training issue.
- **The K7 evidence is narrow.** 15 of 18 ride-alongs were rated good or better. The 3 rated "needs coaching" were all on the K7 controller [5]. That suggests targeted K7 coaching, not a 3-day refresher for all 1,120 technicians [6]. found
- **The complaint rise can't be pinned on Northern Europe.** The 410 to 520 increase [1] is company-wide, and we have no October figures by region. So we can't say Northern Europe drove it, or that K7 did. Note too that the 520 includes only 38 of Asia Pacific's 52 branches [4]. It's unknown whether October's 410 was counted on the same basis.

- **The certificate claim is wrong.** "Our certifications are all in good shape" [6] doesn't hold: 31 are expired and 17 expired technicians worked on lifts [2][3].

What I'd ask before deciding:

1. How many Northern Europe technicians actually work on K7 controllers, and how many complaints or repeat visits involve K7 jobs?
2. What does the €1.1M cover (about €980 per technician), and would a K7-only module for the affected technicians do the job?
3. Why are parts missing from vans, and who owns van stock?
4. What is behind the 95 "no technician available" complaints: headcount, absence, or scheduling?
5. Northern Europe's complaints by category for October, so we can see what actually rose.

5. What's missing from the inputs

- **HVAC readiness.** Every certificate figure covers lift technicians only [2]. For winter, heating work is likely to matter, and we have nothing on it. (This is an assumption about seasonal demand. The inputs don't say it.) `B: say what's not covered`
- **October complaints by region and category.** Without them we can't say where the 110 increase came from [1][4].
- Whether the 410 and the 520 cover the same branches [1][4].
- Certificate data for 14 Asia Pacific branches [2].
- The certificate status on each job date for the 22 technicians in the dispatch check [3].
- What is being done about the 6 expired in Southern Europe, and renewal plans for the other three regions [7].
- Whether the 3 North America technicians are among the 12 that the update says are "on leave or in office roles" [3][7].
- K7 install base, K7 job volumes and K7 complaint counts [5][6].
- How the 18 Northern Europe ride-alongs were chosen, and whether there are ride-along notes for other regions [5].
- Staffing levels compared with demand, which matter for the "no technician available" complaints [4].
- Parts and van-stock data [5].
- A breakdown of the €1.1M cost [6].

Assumptions I've made: I've treated "response time / no technician available" and "billing and other" as not fixable by training, and "quality of work" as possibly fixable. I haven't compared complaint counts with technician counts, because the certificate export covers lift technicians only while complaints probably cover all work. The inputs don't say they are the same group.

`found` caught a planted problem `A–C` Daniel changes it; see the next section

THE HUMAN PART

What Daniel changed, and why

Claude found every planted problem, and also noticed that the dispatch check can't show whether each certificate had expired on the job date. Daniel's edits are about who verifies the safety question, what the page covers, and length.

WHAT CLAUDE FOUND: 7 OF 7 PLANTED PROBLEMS

One run

- ✓ Expired certificates on lift jobs
- ✓ "All in good shape" doesn't hold
- ✓ "On leave" doesn't fit 3 of them
- ✓ 14 branches assumed fine
- ✓ Most complaints aren't training
- ✓ A K7 gap
- ✓ 105 renewals not booked

THREE EDITS, ALL JUDGMENT CALLS

	CLAUDE WROTE	DANIEL'S VERSION	WHY · AUTHORITY
A	"Who decides: the regional service managers (Henrik Dahl for Northern Europe), with Karen Holt's backing. … If one exists, they should confirm the stand-down"	**Daniel sends the 22 names to HSE today. HSE checks each job date and decides whether completed jobs need rechecking. Regional managers take people off lift work; they don't judge their own region's records.**	Two of the regions that sent "all green" or "good shape" have technicians with expired certificates on lift jobs. A safety question goes to the people authorised to answer it.

	CLAUDE WROTE	DANIEL'S VERSION	WHY · SCOPE
B	"HVAC readiness. Every certificate figure covers lift technicians only." (in the list of what's missing)	**The region tiles are headed "lift certificates only", and the page ends with a NOT COVERED line on HVAC.**	Karen asked whether technicians are ready for winter. Without the label she could read "ready" as covering heating work, which the data doesn't show.

	CLAUDE WROTE	DANIEL'S VERSION	WHY · LENGTH
C	Several pages: headline, region table, three actions, the refresher analysis with five questions, and twelve missing items.	**One page: where it stands, four region tiles, and what happens today, by Friday and on the refresher.**	Karen reads it in the monthly review. The full analysis stays in Daniel's notes for the follow-up questions.

What only you can do Decide who verifies a safety question, say what your page doesn't cover, and keep a costly request open until the one missing number arrives. The AI matched the lists. You decide who acts on them.

YOUR TURN

Make it yours

Use it whenever you report readiness for people who work away from a site: field technicians, drivers, installers, inspectors, sales engineers, anyone whose licence or certificate is checked on the job.

YOUR PROMPT: FILL IN THE BRACKETS

I'm the **[your role]** at a **[industry]** company. Each **[month]** I send **[who]** a one-page update on **[readiness, certification, compliance]** by **[region, branch, team]**. This time they also want a view on **[a request]**. The page is due **[date]**. Today is **[date]**. Below are **[the email, the certificate or licence export, the job or dispatch record, complaints or incidents by category, field notes, the request and the regional updates]**.

Please draft the page: **1. The headline** in two sentences. **2. Each [region]**: ready, not ready or unknown, with the input that shows it. **3. Anything that needs action this week**, and who has to decide it. **4. The request**: does the evidence support it, and what would you ask before deciding? **5. What's missing** from the inputs.

Check every certificate claim against who was actually sent to the work, and check whether each kind of complaint is something training could fix. Don't add facts that aren't in the inputs; if you assume something, say so. Name the input for each point.

FIVE CHECKS BEFORE YOU SEND IT

1. The certificate list has been matched to the job record, with the date basis of each stated.
2. Anything with a safety or legal side has gone to the person authorised to decide it.
3. Every region that didn't send data says Unknown, not fine.
4. A training request is tested against what the complaints are actually about.
5. The page says what it doesn't cover.

MAKE IT REPEATABLE (OPTIONAL)

Save the prompt once and reuse it every month: a custom GPT in ChatGPT, a project in Claude, a Gem in Gemini, or an agent in Copilot. Some companies switch these off; copy and paste always works.

WITH REAL DATA

Certificate records, dispatch data and complaints contain personal and customer information. Use only the AI tool your company approves, follow its data rules, and take safety questions to your HSE or compliance team.

WHAT THIS EXAMPLE SHOWS

One run of this prompt in Claude found all seven problems planted in fictional inputs and noticed a limit in the dispatch check that wasn't planted.

WHAT IT DOESN'T SHOW

That every tool, setting or run will do the same, how much time it saves you, or what any lift safety rule requires. Cindrel Building Services and its people are fictional.

APPENDIX

Copy-ready: the prompt and the seven inputs

Copy the prompt, then all seven inputs, into one message in a new chat. Everything here is fictional and safe to paste.

THE PROMPT

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Check every certificate claim against who was actually sent to lift jobs, and check whether each kind of complaint is something training could fix. Don't add facts that aren't in the inputs; if you assume something, say so. Name the input for each point.

[1] EMAIL FROM KAREN HOLT, VP SERVICE

Daniel, for Thursday: are our technicians ready for winter, region by region? Complaints went from 410 in October to 520 in November, and Northern Europe says it's a training problem. Tell me whether we should fund their refresher.

[2] LIFT SAFETY CERTIFICATE EXPORT, DECEMBER 4

Technicians who work on lifts (a valid lift safety certificate is required to work on lifts).

Region	Technicians in scope	Expired	Expiring by Dec 31
North America	1,840	12	40
Northern Europe	1,120	31	22
Southern Europe	960	6	18
Asia Pacific	1,480	9	25

Note: Asia Pacific covers 38 of its 52 branches. 14 branches are still on the old HR system and are not in this export.

[3] DISPATCH CHECK, FROM SERVICE OPERATIONS

Technicians with an expired lift certificate on December 4 who closed at least one lift job between November 5 and December 4: North America 3, Northern Europe 17, Southern Europe 0, Asia Pacific 2 (38 branches).

[4] CUSTOMER COMPLAINTS, NOVEMBER

Region	Total	Response time / no technician available	Repeat visit	Quality of work	Billing and other
North America	140	70	35	20	15
Northern Europe	180	95	50	20	15
Southern Europe	90	45	25	10	10
Asia Pacific (38 branches)	110	60	25	15	10

[5] RIDE-ALONG NOTES, NORTHERN EUROPE, NOVEMBER (FIELD QUALITY TEAM)

18 ride-alongs. 15 rated good or better. 3 rated "needs coaching", all on the new K7 lift controller. In most repeat visits we saw, the part needed was not on the van.

[6] TEAMS MESSAGE FROM HENRIK DAHL, REGIONAL SERVICE MANAGER, NORTHERN EUROPE

Complaints are up because our technicians aren't trained on the K7. We need the 3-day refresher for all 1,120 technicians, about €1.1M. Our certifications are all in good shape.

[7] REGIONAL UPDATES

- North America: All green. The 12 expired certificates are people on leave or in office roles.
- Southern Europe: On track. Renewals booked for everyone expiring in December.
- Asia Pacific: 38 branches reporting, all fine. The other 14 are on the old system; we assume they're fine too.