Close-out conversation sheet

Pick one record. Talk to the person who wrote it and the person who uses it.

Job or record reference

Who enters the note?

Who uses it next?

What does the next person need?

What question should this record help them answer?

Read the note together

What does the current note say?

What was observed, done and checked? What is still unknown?

What made it hard to capture?

Can they see its value?

What does the team value?

What gets in the way?

Agree one change, then look again

What will change? Agree this with the people doing the work.

Who will take it forward?

When will you review it?

Can the next person use it? What effort did capture take? What happens next?

Use alongside local close-out requirements. The people responsible for the work agree any change.

Inspired by Murphy (2009), doi.org/10.1016/j.ress.2009.05.008

Worked example

A fictional pump repair. The proposed change and review have yet to happen.

Job or record reference	Who enters the note?	Who uses it next?
Fictional pump shaft-seal repair	Technician	Next-shift technician

What does the next person need?

What question should this record help them answer?

What did the post-repair check establish, and what still needs clarification?

Read the note together

What does the current note say?

Seal replaced. Tested OK.

What was observed, done and checked? What is still unknown?

Shaft-seal leakage observed. Seal replaced. During a 10-minute run, no visible leakage. Cause unknown. Normal-duty conditions unrecorded.

What made it hard to capture?

Can they see its value?	What does the team value?	What gets in the way?
Show how the next shift uses the note to decide what to check.	Ask about the test detail as well as whether the order is closed.	Shared terminal; another job waiting. Ask what access or timing would help.

Agree one change, then look again

What will change? Agree this with the people doing the work.

Agree a short note example covering finding, action, check and unknowns. Ask the technician what would make it usable.

Who will take it forward?	When will you review it?
Maintenance process owner	Agree at the conversation

Can the next person use it? What effort did capture take? What happens next?

At an agreed review, read a small sample with its users. Can they answer the question? Ask what effort capture took. Result pending.

Use alongside local close-out requirements. The people responsible for the work agree any change.

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