SBAR Service Intake Guide

While we can’t always expect other parties to think through this guide before requesting a service from you, you can utilize the questions below to your advantage to make sure you’re receiving all the information you need to succeed. Similarly, you can think through this guide before requesting a service from someone, you can utilize the questions below to ensure you are not missing any important details the other party will need while completing the task at hand.

Situation: What is happening?
Briefly describe the current situation. Give a clear, consistent overview of the situation at hand. The conversation could simply start by informing the other party you have received an email, phone call, or have had a conversation that will lead to this service request. The conversation could result in a service intake itself.

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Background: What relevant factors led up to this event?
Briefly describe the relevant factors led up to this event. What information were you given that led to this request and what has already happened.

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Assessment: What do you think is going on?
Use your best judgement to summarize the facts and give your best assessment.

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Recommendation: What actions are you asking for?
What actions do you propose? What action do you think is best? What are you specifically asking of the other party or what are they asking of you?

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