Score your operation

Answer honestly for a normal week, not your best one. Complete this with your service manager and a dispatcher: they may disagree, and the disagreement tells you something.

2 Yes	1 Partly or inconsistently	0 No

#	QUESTION	SCORE
01	Do all requests, from every channel, land in one queue with the same required details?	
02	Do you have written priority definitions that two dispatchers would apply the same way?	
03	Do you try a remote fix or client-side check before dispatching common faults?	
04	Is planned maintenance capacity protected, with due windows per task?	
05	Does dispatch consider certifications and parts, not only location?	
06	Is planned work grouped by area, with slack kept for emergencies?	
07	Do technicians see asset history, access details and parts before arriving?	
08	Can a routine job be closed on the app in a few minutes, with no signal?	
09	Are checklists limited to work where they matter, with evidence required?	
10	Are jobs signed off on site and invoiced from that record without retyping?	
11	Do subcontractors work in the same system, on the same clock?	
12	Do you review a small set of numbers on a fixed schedule, and act on them?	

Add your 12 scores

YOUR TOTAL _____ / 24

0-8 Start with intake (practices 1 and 2) and close-out (practice 10). They're the cheapest to fix and they produce the data everything else depends on.

9-16 The basics are in place. The biggest gains are probably in dispatch and preparation (practices 5 and 7), where first-time fix is won or lost.

17-24 You're in good shape. Look at subcontractor visibility and whether your reviews lead to decisions (practices 11 and 12).

Need a starting point? See the symptom guide on page 2.

Where to start if something already hurts

Most teams don't come to a list like this for fun. Something is going wrong, and they want to know which habit to fix first. Find the symptom closest to yours.

SYMPTOM	PRACTICES TO LOOK AT FIRST
Invoices go out a week or more after the work	**10** Sign-off and invoicing
Second visits because the part wasn't there	**5, 7** Dispatch and job preparation
SLA breaches cluster on Monday mornings or after storms	**2, 6** Priorities and schedule slack
Clients dispute whether work was done	**9, 10** Evidence and sign-off
PM visits keep slipping and an audit is coming	**4** Protected PM capacity
Nobody knows where subcontracted jobs stand	**11** Subcontractor visibility
Technicians fill in service sheets at the end of the week	**8** Mobile job close-out
Lots of "no fault found" visits	**1, 3** Intake and remote checks
Every dispatch decision depends on one experienced person	**5, 7** Dispatch and job preparation
Monthly reports take days to compile and nobody trusts them	**10, 12** Job records and metric reviews

Turn the symptom into a starting point.

Match the practice numbers to the scorecard on page 1. Choose one habit to improve first.

Back to the 12-question scorecard on page 1.