

Discovery & Process Design Summary

Field Service Scheduling & Dispatch Implementation

Portfolio project based on Juniper Vale Home Services, a fictional field-service company. Business data is synthetic.



Discovery focus

Sessions covered customer service, dispatch, field supervision, inventory, systems, finance/reporting, management, and frontline work. The goal was to understand where information is lost, where decisions are made outside the system, and which exceptions need clear owners.

Finding	Operational effect
Required intake fields are inconsistent	Dispatch spends time clarifying work that is not ready to schedule.
Technician eligibility is spread across notes and separate references	Assignments are corrected after they are made.
Capacity is visible late	Route changes are more likely after publication.
Inventory readiness is checked too late	Some jobs are delayed after the schedule is built.
Exceptions rely on free text	Ownership, due times and final disposition are hard to track.
Closeout requirements vary by service	Quality review is inconsistent.
Follow-up is not always assigned	Customer recovery can disappear in notes.
Reporting requires manual reconciliation	Managers spend time rebuilding the weekly view.

Future-state direction

Move readiness checks earlier, make technician eligibility and capacity visible before assignment, record route-change reasons, use clear exception ownership, standardize completion evidence, assign customer follow-up, and capture the fields needed for reporting as part of normal work.

Root causes and design response

Root cause	Design response
Key scheduling information is optional or buried in notes	Required and service-specific intake fields
Skills, territory and availability are not checked in one place	Eligibility rules before capacity and assignment
Capacity is managed through manual judgment without a consistent state	Visible capacity thresholds with named override authority
Critical inventory is not tied to scheduling readiness	Critical-item classes and freshness/readiness states
Exception work lacks structured ownership	Exception type, owner, due time, status and disposition
Completion evidence differs by technician/service	Service-specific closeout requirements and QA review
Reporting fields are not captured consistently	Standard status, reason and event fields used by both operations and analytics

Discovery result

The discovery baseline is ready to move into detailed requirements and solution design. Open technical and data questions stay assigned to the stage where they can be answered with evidence.