

Sales-to-Implementation Handoff

Field Service Scheduling & Dispatch Implementation

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

Handoff decision

The implementation team has enough business context to begin kickoff and discovery. Known assumptions remain assigned to discovery, design, data, and readiness work rather than being treated as settled facts.

Context	Handoff summary
Reason for change	Disconnected intake, scheduling, readiness, closeout, follow-up and reporting create manual work and inconsistent control.
Target timing	Delivery begins September 14, 2026. January 11, 2027 is the readiness-gated target for go-live.
Core scope	Intake, scheduling, dispatch, field completion, exceptions, customer follow-up, reporting and active/open data migration.
Retained systems	CRM, route planning, QuickBooks Online, notifications, analytics and identity remain where they fit the Release 1 design.
Decision owners	Operations Sponsor, Implementation Lead and named operational leads retain authority for scope, acceptance and launch.

Items to confirm during delivery

Item	Owner / next step
Packaged platform fit	Validate during fit-gap and configuration planning
Retained-system exchanges	Confirm supported connector/file approach and failure handling
Identity and role access	Confirm SSO, named accounts and technician lifecycle
Field connectivity	Confirm queued/offline behavior and retry path
Customer communication consent	Profile contact/consent data before activation
Critical inventory rules	Confirm which items should warn, hold, or require review
Project availability	Confirm SMEs, vendor resources, testers and trainers at each gate

Kickoff input

The handoff keeps pre-sale context useful without turning assumptions into implementation commitments. Discovery starts from these points and confirms what the operating process actually requires.