

Project Charter

Field Service Scheduling & Dispatch Implementation

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

JVH-FSM

project code

16 weeks

delivery plan

48

base employees

4

service territories

Purpose

Establish a consistent field-service operating model for intake, scheduling, dispatch, service readiness, completion, follow-up, and reporting while keeping high-impact exceptions and launch decisions with named owners.

Business problem

The current process relies on CRM notes, a shared dispatch workbook, a route tool, technician mobile tools, and manual reconciliation. Information needed for scheduling is often incomplete, and ownership becomes unclear when work changes after publication.

Release 1 scope

Area	Included work
Discovery & process	Current state, business objectives, requirements, business rules and future state
Scheduling & dispatch	Skills, territory, availability, capacity, assignment, publication and exceptions
Field & quality	Technician workflow, completion evidence, QA review and customer follow-up
Data	Active customers, plans, technicians, services, tracked items and open work
Access & interfaces	Role-based access and supported exchanges with retained systems
Transition	UAT, training, readiness, cutover, go-live, hypercare and support handoff
Reporting	KPI definitions, standard extracts and an analytics-ready data set

Success measures

Measure	Baseline	Target
Intake completeness	78.4%	95.0%
Invalid assignment rate	4.7%	1.5% max
Route change rate	12.2%	7.5% max
Inventory delay	3.4%	1.8% max
Closeout completeness	84.1%	96.0%
Follow-up SLA	75.8%	90.0%

Measure	Baseline	Target
Reporting prep	4.6 hr/week	1.5 hr/week max
Capacity status coverage	18.0%	95.0%

Roles and decisions

Role	Primary responsibility
Operations Sponsor	Business outcomes, major scope decisions and go-live authority
Implementation Lead	Delivery plan, workshops, cross-workstream coordination, risks and decisions
Operations Manager	Scheduling/dispatch operating model, capacity and performance
Customer Service Lead	Intake quality, consent, follow-up and customer communication
Dispatch Lead	Eligibility, capacity, assignment, route changes and exceptions
Field Supervisor	Technician workflow, closeout quality and field readiness
Systems Coordinator	Access, interfaces, data movement and support readiness
Inventory Coordinator	Critical-item readiness, replenishment and exceptions

Major project risks

Risk	Response
Data quality delays migration	Profile early, assign owners, correct critical errors before the migration gate
Platform or interface assumptions do not fit	Validate during solution design and route material changes through change control
Training or user availability falls behind	Use role-based readiness tracking and targeted remediation
Peak operating demand reduces project capacity	Plan around the year-end blackout and protect critical launch activities
Field connectivity affects completion	Define retry/fallback behavior and include it in UAT

Approval

The charter authorizes kickoff, discovery, and planning against this scope. Detailed design, migration readiness, UAT acceptance, and launch decisions are approved at their own project gates.