

Role Guides & Training Enablement

Release 1 scheduling, dispatch and field operations

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



Training approach

Training is organized around the work each role has to perform, the decisions each role is allowed to make, and the evidence required before independent access.

Role	Training focus
Customer Service	Complete intake, communication preference/consent, follow-up ownership and escalation
Dispatch	Eligibility, capacity, assignment, route publication, change reasons and exceptions
Technician	Assigned work, service status, completion evidence, issue reporting and sync/fallback
Field Supervisor	Closeout quality, service exceptions, technician support and readiness
Operations Manager	Capacity, exceptions, KPI review, overrides and launch/support decisions
System Administrator	Users/roles, configuration baseline, interface status, support and change control

Readiness rule

Training attendance alone is not enough for independent access. Users must complete the role-specific practice and knowledge checks. If a gap appears, the affected user stays supervised until targeted remediation is complete.

Dispatcher quick guide

- Confirm required intake information before scheduling.
- Check technician eligibility before capacity.
- Use the defined capacity state before assigning work.
- Record a reason for post-publication route changes.
- Use the exception workflow when an issue needs an owner, due time, or escalation.
- Do not use an override to hide an unresolved readiness issue.

Technician quick guide

- Open the assigned appointment and confirm the customer/service details.
- Use the approved field status as work progresses.
- Record service notes, materials, and required completion evidence.
- If connectivity is weak, follow the queued/sync guidance and confirm completion when the device reconnects.
- Escalate safety, access, inventory, or customer issues through the normal exception path.

Readiness result

Two technicians needed targeted remediation before independent access. Both completed the required follow-up and the final readiness count reached 47 of 47 users.