FIELD NOTES · FIELD SERVICE OPERATIONS

Five places field teams quietly lose hours

When the work happens on site and the paperwork happens back at the office, the gap between them is where the day goes.

01 The job that comes back for a second visit

An engineer arrives without the right part, or a spec detail turns out wrong on site. Most of these trips are avoidable.

02 Turning a finished job into an invoice

Photos and sign-off trickle back over days, not hours. Every day of lag is a day further from getting paid.

03 Job details that only one person really understands

Access quirks and customer preferences live in one person's memory. When they're off, the operation runs a little blind.

04 Scheduling built around traffic and geography by feel

Whoever plans the day solves a hard puzzle from memory. It hides how much time it actually costs.

05 Compliance and certification tracked on a spreadsheet

Tracked by hand, it's a nagging worry or a nasty surprise. The cost isn't the admin. It's the job you legally can't do.

AND TWO YOU SHOULD LEAVE ALONE

Diagnosing the actual work. Knowing what's wrong on sight is craft built over years. No software replaces it.

Winning back an unhappy customer. The fix is a person on the phone, owning it. Automating that touch makes it colder, not smoother.

The next page: what a fix looks like.

02
THE FIX

What good looks like

Matched to the numbers on the previous page. This is the shape we'd build toward, not a specific product.

WHERE IT SLIPS	WHAT GOOD LOOKS LIKE
01 Second visit	Full spec and parts list travel with the job before the engineer leaves the yard.
02 Job to invoice	Photos, sign-off, and extras get logged the same day, tied to the job number.
03 Site knowledge	Access notes and history live on the job record, not one person's memory.
04 Scheduling	Jobs get assigned by location, skill, and time together, not worked out fresh each morning.
05 Compliance	Every ticket and certification carries its own expiry, checked without anyone remembering to look.

IN PLAIN TERMS

This is the shape, not the software. What you'd actually build depends on how your team already works, and some of it might not need software at all.

WHICH ONE HITS CLOSEST

Reply with the number from page one, and I'll tell you which of these you're probably already close to, and which is worth a look first.

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