**BUSINESS CASE #3**

**(ANALYTICAL & PROCESS)**

**The Process:**



**The Situation:**

During the performance evaluation process, the client noticed that a few of their worst performing field technicians have made remarkable improvements in their Repeat measurement. A field technician receives a Repeat when he completes a service order and the customer’s issue is not resolved, thus resulting in a second service order within 30 days to the same customer. The client suspects that technicians are purposefully utilizing maintenance codes, which are filtered for Repeats, to close their work orders, thus shielding themselves from Repeats. Through your investigation, you discover that technicians, if they are following the correct process, must create an escalation work order for the maintenance organization. If they do not create the maintenance ticket, they are not following the process, thus it is fair to assume that they are intentionally manipulating their performance scores.

The client uses a system of points as a measure of time on job. The time on job is calculated as completion time – arrival time and one point is equal to five minutes.

You have been provided two data sets from the client. Table one is field tech work order data. Table 2 is maintenance tech escalation data. The client has asked you to complete an analysis of the data from the two tables. The client specifically requested that you identify the technicians that are not creating the escalation tickets. And finally, the client has asked that you summarize your findings and make recommendations for tracking field tech compliance, and the performance management process.

**The Ask:**

* Provide a Tableau dashboard including the following:
  + A line graph of the total number of work orders by week
  + A histogram of the Time on Job of all work orders measured in points. What is average time on job?
  + Identify the technicians that utilized the maintenance code when completing the work order but did not create an escalation ticket. Summarize the top 10 technicians with the most missing escalation tickets
  + Provide any additional visuals or statistics based on the data
* Create a brief summary document including:
  + A written description of the methodology you used in order to complete the analysis
  + A description of your findings. The section should include your tables, charts, and any additional summary statistics.
  + Recommendations: Please provide a summary of your recommendations. For example, how would you improve the tech escalation process in order to ensure compliance? How would you encourage technicians to adhere to your new process? What would you recommend that the client do in order to address the technicians that were identified to be the worst followers of the current process?

**Pertinent Info:**

* Maintenance Codes: Plant Escalation Finding Codes: ('Z5','Z6','Z7','Z8','Z9','ZA','ZB','ZC','ZE','ZF','ZG','ZH')
* Please provide your work products in addition to the final results.

Please email your analysis work products and the two page report to nsabree@rowerconsulting.com. Feel free to use all resources at your disposal in order to complete this assignment.