

Technician Dashboard

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02 May, 2025

1

POWER BI DASHBOARD



Technician Analysis | Overview Analysis

Date

All

Business Unit

All

Technician

All

\$53.9K

Revenue

96

Jobs Completed

79.5%

Close Rate (%)

84.8%

Booking Rate (%)

\$16.8K

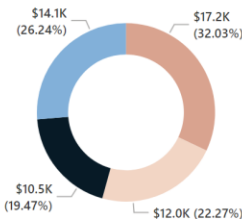
Revenue Per Job

Overview Analysis

Details

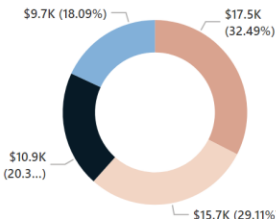


Gross Profit by Technician



Tech A
Tech B
Tech C
Tech D

Gross Profit by Business Unit



Electrical
HVAC Install
Plumbing
HVAC Service

Huddle View

Huddle Note	Jobs		Close Rate (%)	Booking Rate (%)	Player Score Per Job
Watch productivity	24		78.0%	89.2%	2.7
Needs follow-up	30		83.4%	85.8%	2.7
On track	23		74.0%	81.8%	3.3
Great performance	19		81.5%	79.5%	4.2
Total	96		79.5%	84.8%	0.8

Sales Run Rate Tracker

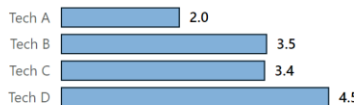


Player Card Summary

Tech Score by Close Rate



Tech Score by Score per Job



Technician		Close Rate (%)	Score Card	Revenue Per Job	Player Score Per Job
Tech A		80.2%	610.00	507.3	2.0
Tech B		72.4%	532.00	545.2	3.5
Tech C		83.8%	431.00	499.3	3.4
Tech D		81.8%	683.00	743.7	4.5



Technician Analysis | Overview Analysis



Overview Analysis

Details



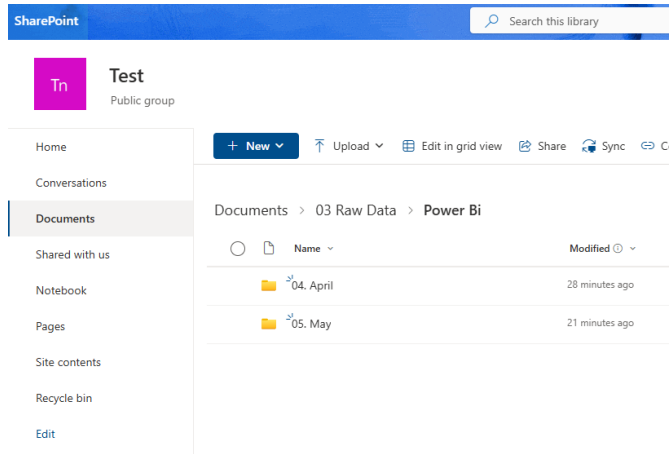
Date	Technician	Business Unit	Jobs Completed	Gross Profit (\$)	Close Rate (%)	Booking Rate (%)	Players Card Score	Sales Run Rate (\$)	Card Score per Job	Huddle Note	Job URL
4/1/2025	Tech D	HVAC Install	4	\$2,839	81.0%	95.0%	94.00	\$3,443	23.5	Watch productivity	https://servicetitan.mock/job/1
4/2/2025	Tech D	HVAC Install	2	\$1,949	91.0%	88.0%	77.00	\$1,335	38.5	Needs follow-up	https://servicetitan.mock/job/2
4/3/2025	Tech B	Plumbing	4	\$1,175	95.0%	85.0%	59.00	\$2,578	14.8	Needs follow-up	https://servicetitan.mock/job/3
4/4/2025	Tech C	Plumbing	1	\$2,422	88.0%	92.0%	56.00	\$4,369	56.0	Watch productivity	https://servicetitan.mock/job/4
4/5/2025	Tech D	HVAC Service	1	\$646	72.0%	85.0%	63.00	\$2,722	63.0	Needs follow-up	https://servicetitan.mock/job/5
4/6/2025	Tech B	HVAC Install	3	\$1,710	61.0%	87.0%	63.00	\$2,236	21.0	Watch productivity	https://servicetitan.mock/job/6
4/7/2025	Tech B	Electrical	1	\$2,887	62.0%	84.0%	54.00	\$2,416	54.0	Watch productivity	https://servicetitan.mock/job/7
4/8/2025	Tech B	HVAC Service	5	\$626	67.0%	71.0%	114.00	\$4,636	22.8	Great performance	https://servicetitan.mock/job/8
4/9/2025	Tech D	Electrical	5	\$1,603	85.0%	94.0%	104.00	\$2,751	20.8	Needs follow-up	https://servicetitan.mock/job/9
4/10/2025	Tech C	Electrical	3	\$921	82.0%	74.0%	89.00	\$3,635	29.7	On track	https://servicetitan.mock/job/10
4/11/2025	Tech A	Electrical	4	\$2,432	76.0%	93.0%	92.00	\$2,442	23.0	On track	https://servicetitan.mock/job/11
4/12/2025	Tech B	HVAC Install	5	\$645	74.0%	81.0%	57.00	\$3,504	11.4	Watch productivity	https://servicetitan.mock/job/12
4/13/2025	Tech C	Electrical	3	\$1,504	91.0%	86.0%	79.00	\$4,583	26.3	Watch productivity	https://servicetitan.mock/job/13
4/14/2025	Tech D	HVAC Service	1	\$1,826	83.0%	93.0%	70.00	\$2,192	70.0	Watch productivity	https://servicetitan.mock/job/14
4/15/2025	Tech C	Electrical	5	\$947	75.0%	80.0%	84.00	\$1,192	16.8	Needs follow-up	https://servicetitan.mock/job/15
4/16/2025	Tech C	Plumbing	4	\$1,843	98.0%	98.0%	72.00	\$4,380	18.0	Great performance	https://servicetitan.mock/job/16
4/17/2025	Tech D	HVAC Install	2	\$842	89.0%	77.0%	100.00	\$3,086	50.0	Needs follow-up	https://servicetitan.mock/job/17
4/18/2025	Tech D	HVAC Service	1	\$1,692	93.0%	86.0%	58.00	\$4,661	58.0	Watch productivity	https://servicetitan.mock/job/18
4/19/2025	Tech A	Electrical	5	\$1,438	89.0%	73.0%	87.00	\$4,151	17.4	Needs follow-up	https://servicetitan.mock/job/19
4/20/2025	Tech A	Electrical	4	\$1,274	65.0%	71.0%	52.00	\$3,991	13.0	On track	https://servicetitan.mock/job/20
4/21/2025	Tech A	Electrical	4	\$1,843	74.0%	82.0%	58.00	\$3,545	14.5	On track	https://servicetitan.mock/job/21
4/22/2025	Tech B	HVAC Service	1	\$2,099	74.0%	72.0%	114.00	\$1,514	114.0	Great performance	https://servicetitan.mock/job/22
4/23/2025	Tech A	Plumbing	4	\$2,655	64.0%	91.0%	94.00	\$1,715	23.5	Needs follow-up	https://servicetitan.mock/job/23
4/24/2025	Tech A	Electrical	2	\$1,945	91.0%	99.0%	67.00	\$3,808	33.5	Needs follow-up	https://servicetitan.mock/job/24
4/25/2025	Tech B	HVAC Service	3	\$2,852	74.0%	74.0%	71.00	\$3,383	23.7	Great performance	https://servicetitan.mock/job/25
4/26/2025	Tech C	Plumbing	5	\$2,848	69.0%	99.0%	51.00	\$2,141	10.2	Watch productivity	https://servicetitan.mock/job/26
4/27/2025	Tech A	Electrical	5	\$703	87.0%	87.0%	51.00	\$2,126	10.2	On track	https://servicetitan.mock/job/27
4/28/2025	Tech A	HVAC Install	4	\$2,044	85.0%	72.0%	56.00	\$2,248	14.0	Great performance	https://servicetitan.mock/job/28
4/29/2025	Tech D	HVAC Install	3	\$2,733	60.0%	84.0%	117.00	\$1,857	39.0	On track	https://servicetitan.mock/job/29
Total			96	\$53,857			2,256.00	\$91,476	0.8		

POWER BI LOGIC

Technician Dashboard

1. Data Import & Transformation

- Imported data from SharePoint folder



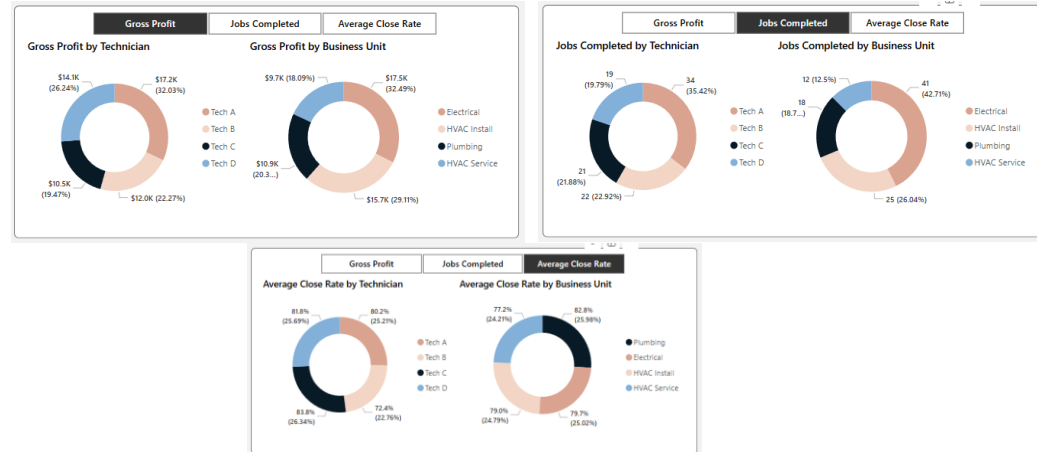
- Added test data for May for demonstration purposes only

POWER BI LOGIC

Technician Dashboard

2. Visualization

- Added 5 KPIs at the top for a high-level business summary.
- Added 3 dynamic filters for breakdown metrics by Technician and Business Unit
 - Gross Profit
 - Jobs Completed
 - Average Close Rate

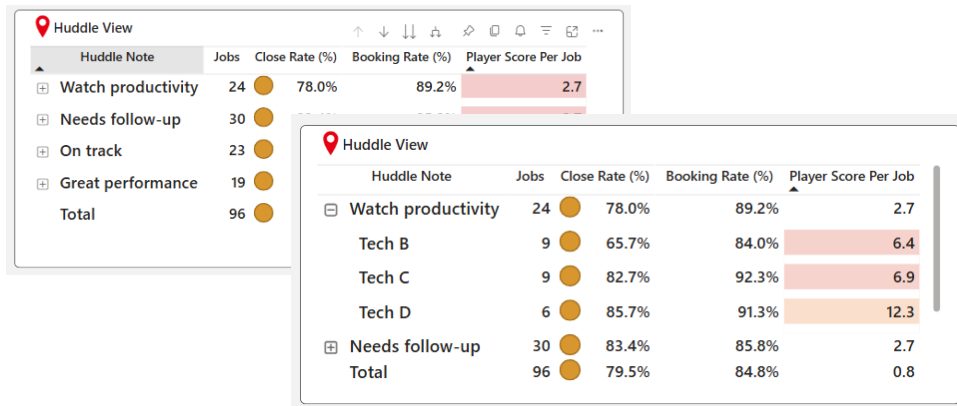
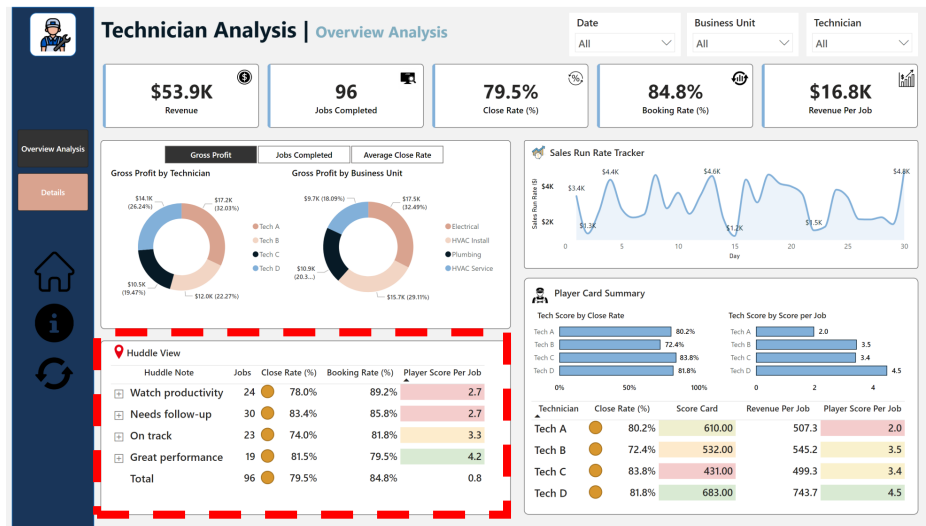


POWER BI LOGIC

Technician Dashboard

2. Visualization

- Huddle View:
 - Gives a quick performance snapshot categorized by huddle notes
- Key Metrics:
 - Job - Shows workload and activity.
 - Close Rate and Booking Rate - Track sales and booking efficiency.
 - Player Score Per Job - Performance comparison across techs.
- Added conditional formatting:
 - Close Rate based on the dataset
 - ◆ Needs Coaching (< 60%)
 - ▲ On Target (< 90%)
 - Excellent (> 90%)
 - Player Score Per Job gradient from min to max

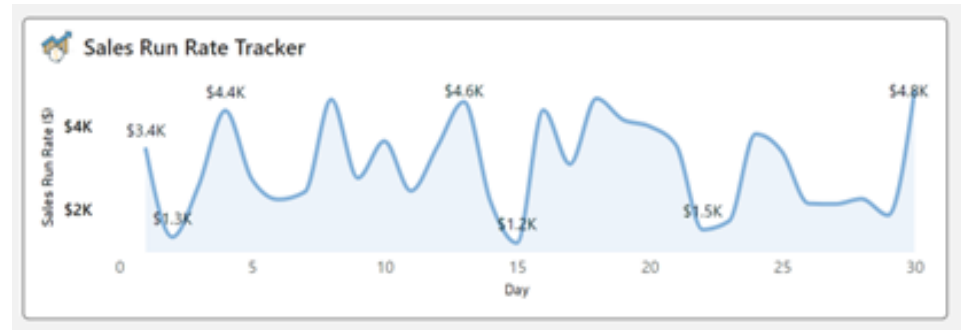
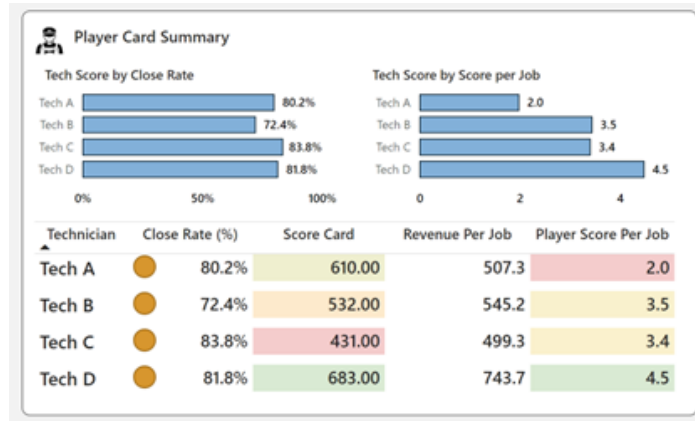
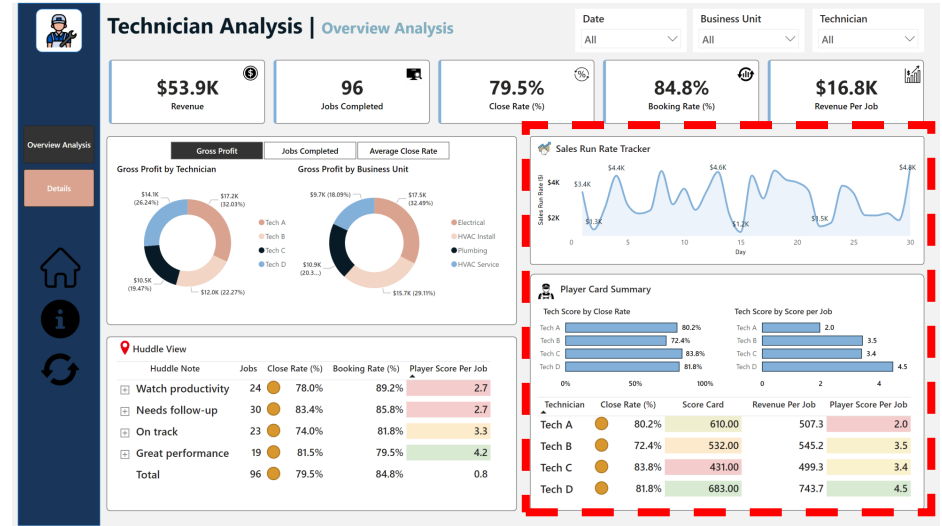


POWER BI LOGIC

Technician Dashboard

2. Visualization

- Sales Run Rate Tracker
 - Tracks revenue generated per technician.
 - Shows sales trends over time to identify dips, peaks, and momentum.
- Player Card Summary
 - Snapshot of overall technician performance.

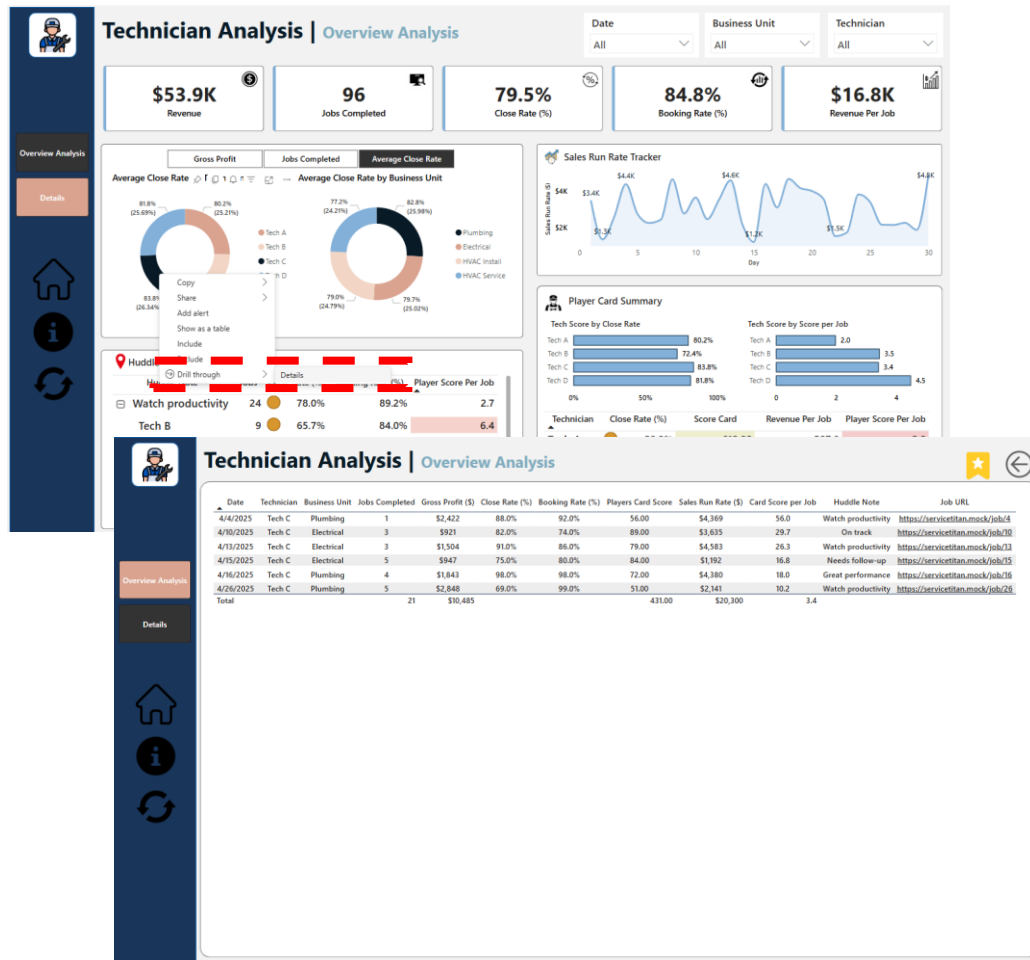


POWER BI LOGIC

Technician Dashboard

3. Drill Through

- Enabled drill through pages to view detailed performance or job level data.
- Clickable Job URLs open the full job record (mock link), simulating CRM access.
- Visuals are fully connected – selecting a value in one chart updates the others in real-time.

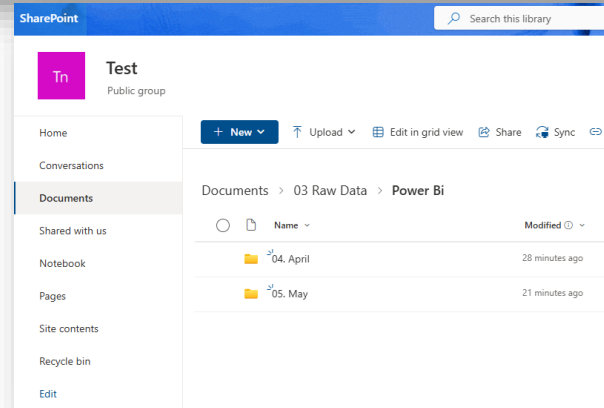
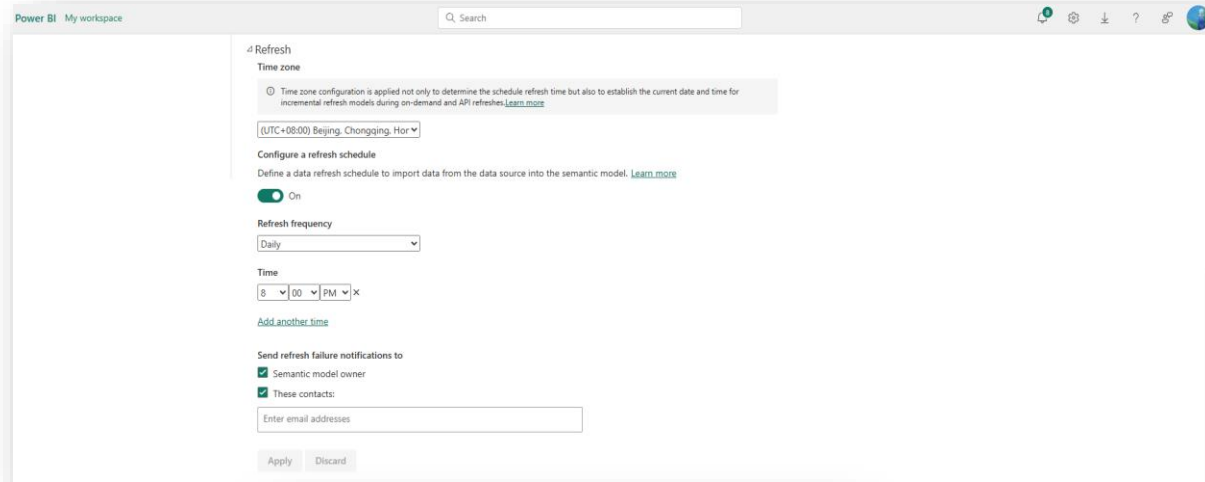


POWER BI LOGIC

Technician Dashboard

4. Schedule Refresh

- Added daily refresh.
- Source is connected to SharePoint.



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DASHBOARD ICONS



Technician Analysis | Overview Analysis

Page Filter

Date

All

Business Unit

All

Technician

All

\$53.9K

Revenue

96

Jobs Completed

79.5%

Close Rate (%)

84.8%

Booking Rate (%)

\$16.8K

Revenue Per Job

Overview Analysis

Details



Unfilter all filters

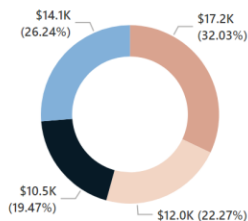
Gross Profit

Jobs Completed

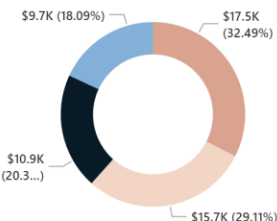
Average Close Rate

Gross Profit by Technician

Gross Profit by Business Unit



Tech A
Tech B
Tech C
Tech D



Electrical
HVAC Install
Plumbing
HVAC Service

Dynamic Filter by Technician & Business Unit



Player Card Summary

Tech Score by Close Rate



Tech Score by Score per Job



Huddle View

Huddle Note	Jobs	Close Rate (%)	Booking Rate (%)	Player Score Per Job
Watch productivity	24	78.0%	89.2%	2.7
Needs follow-up	30	83.4%	85.8%	2.7
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Tech D	81.8%	683.00	743.7	4.5



Technician Analysis | Overview Analysis

Date

All

Business Unit

All

Technician

All

Closes metric description

\$53.9K

96

79.5%

84.8%

\$16.8K

Per Job

Metric Descriptions for Info Button

Gross Profit (\$) - Indicates how much money was actually earned after costs like labor or materials.

Jobs Completed - Total number of service jobs closed out by a technician. Higher numbers show greater output, but quality should also be considered.

Close Rate (%) - The percentage of booked leads that result in a completed job. A higher close rate suggests better sales performance and technician persuasiveness.

Booking Rate (%) - The percentage of leads or opportunities that are successfully scheduled for service. Reflects call center or dispatch efficiency and customer interest.

Players Card Score - A composite performance score based on key KPIs like close rate, booking rate, and revenue. Designed to quickly assess a tech's overall effectiveness.

Sales Run Rate (\$) - Projected monthly or weekly revenue if current sales performance continues.

Huddle Note - Assigned notes about technician behavior, performance, or follow-up actions.

Revenue per Job - Total gross profit divided by the number of jobs. Shows how much money each job is worth on average — a key efficiency and upsell metric.

Technician - The field staff member assigned to the job.

Business Unit - Department or job category (e.g., HVAC, Electrical, Plumbing).

Job URL - Clickable link to the job record in the system.

Players Card Summary - A consolidated performance overview including multiple KPIs to provide a quick snapshot of a technician's success or red flags.

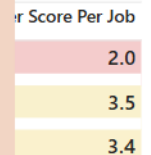
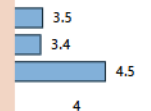
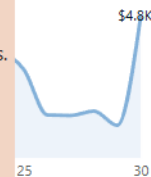
Huddle View - A focused view combining notes, KPIs, and performance flags for use during team meetings or daily briefings.

Sales Run Rate Tracker - A chart or KPI panel showing whether a tech is pacing ahead or behind on expected revenue targets over time.

Display metric description

Overview Analysis

Details



Tech D

81.8%

683.00

743.7

4.5



Technician Analysis | Overview Analysis

Unfilter after drill through



Overview Analysis

Details



Date	Technician	Business Unit	Jobs Completed	Gross Profit (\$)	Close Rate (%)	Booking Rate (%)	Players Card Score	Sales Run Rate (\$)	Card Score per Job	Huddle Note	Job URL
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4/5/2025	Tech D	HVAC Service	1	\$646	72.0%	85.0%	63.00	\$2,722	63.0	Needs follow-up	https://servicetitan.mock/job/5
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4/20/2025	Tech A	Electrical	4	\$1,274	65.0%	71.0%	52.00	\$3,991	13.0	On track	https://servicetitan.mock/job/20
4/21/2025	Tech A	Electrical	4	\$1,843	74.0%	82.0%	58.00	\$3,545	14.5	On track	https://servicetitan.mock/job/21
4/22/2025	Tech B	HVAC Service	1	\$2,099	74.0%	72.0%	114.00	\$1,514	114.0	Great performance	https://servicetitan.mock/job/22
4/23/2025	Tech A	Plumbing	4	\$2,655	64.0%	91.0%	94.00	\$1,715	23.5	Needs follow-up	https://servicetitan.mock/job/23
4/24/2025	Tech A	Electrical	2	\$1,945	91.0%	99.0%	67.00	\$3,808	33.5	Needs follow-up	https://servicetitan.mock/job/24
4/25/2025	Tech B	HVAC Service	3	\$2,852	74.0%	74.0%	71.00	\$3,383	23.7	Great performance	https://servicetitan.mock/job/25
4/26/2025	Tech C	Plumbing	5	\$2,848	69.0%	99.0%	51.00	\$2,141	10.2	Watch productivity	https://servicetitan.mock/job/26
4/27/2025	Tech A	Electrical	5	\$703	87.0%	87.0%	51.00	\$2,126	10.2	On track	https://servicetitan.mock/job/27
4/28/2025	Tech A	HVAC Install	4	\$2,044	85.0%	72.0%	56.00	\$2,248	14.0	Great performance	https://servicetitan.mock/job/28
4/29/2025	Tech D	HVAC Install	3	\$2,733	60.0%	84.0%	117.00	\$1,857	39.0	On track	https://servicetitan.mock/job/29
Total			96	\$53,857			2,256.00	\$91,476	0.8		

3

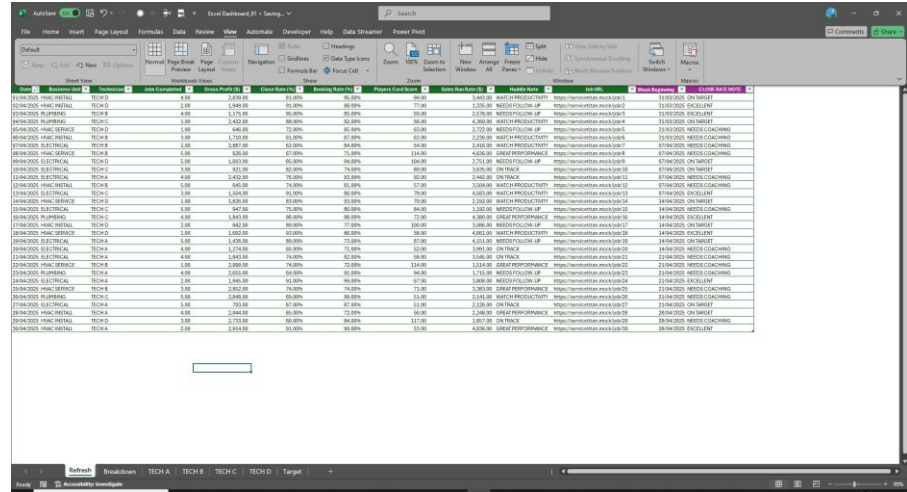
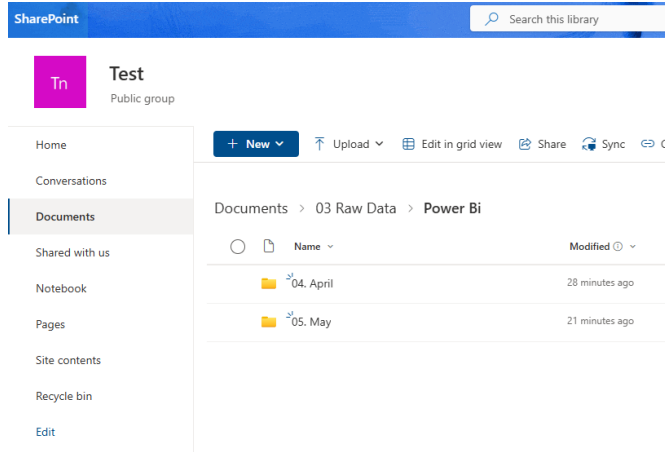
EXCEL DASHBOARD

EXCEL DASHBOARD

Technician Dashboard

1. Date Import & Cleaning

- Imported data from SharePoint folder



- Picks up new data (e.g. May) from the sharepoint folder after automatic refresh.
- Data is presented in "Refresh" worksheet to demonstrate after cleaning process

EXCEL DASHBOARD

Technician Dashboard

2. Report Structure

- Provides a high-level view of technician performance across Business Units.
- Includes guidance on how the report can be shared automatically (CRM-style) with technicians.

Date	Business Unit	CLOSE RATE NOTE	Technician	Week Beginning
01/04/2025	ELECTRICAL	EXCELLENT	TECH A	31/03/2025
02/04/2025	HVAC INSTALL	NEEDS COACHING	TECH B	07/04/2025
03/04/2025	HVAC SERVICE	ON TARGET	TECH C	14/04/2025
04/04/2025	PLUMBING		TECH D	21/04/2025
05/04/2025				28/04/2025
06/04/2025				
07/04/2025				
08/04/2025				

Technician	Business Unit	JOBS COMPLETED	GROSS PROFIT (\$)	BOOKING RATE (%)	CLOSE RATE (%)	REVENUE PER JOB	SCORE PER JOB
TECH A	ELECTRICAL	24	\$9,635.0	84.2%	80.3%	401.5	2.8
	HVAC INSTALL	6	\$4,958.0	81.0%	88.0%	826.3	9.1
	PLUMBING	4	\$2,655.0	91.0%	64.0%	663.8	23.5
TECH B	ELECTRICAL	1	\$2,887.0	84.0%	62.0%	2887.0	54.0
	HVAC INSTALL	8	\$2,355.0	84.0%	67.5%	294.4	7.5
	HVAC SERVICE	9	\$5,577.0	72.3%	71.7%	619.7	11.1
TECH C	PLUMBING	4	\$1,175.0	85.0%	95.0%	293.8	14.8
	ELECTRICAL	11	\$3,372.0	80.0%	82.7%	306.5	7.6
	PLUMBING	10	\$7,113.0	96.3%	85.0%	711.3	6.0
TECH D	ELECTRICAL	5	\$1,603.0	94.0%	85.0%	320.6	20.8
	HVAC INSTALL	11	\$8,363.0	86.0%	80.3%	760.3	8.8
	HVAC SERVICE	3	\$4,164.0	88.0%	82.7%	1388.0	21.2
Grand Total		96	\$53,857.0	84.8%	79.5%	561.0	0.8

NOTE:

CRM-Style Distribution via SharePoint and Power Automate

This Excel report is saved to SharePoint as a live file. A scheduled data refresh can be configured using Power Automate, allowing it to automatically pull updates from the connected data source (SharePoint Lists).

Automated Technician Report Distribution (CRM-like):

Using Outlook + Power Automate, personalized reports can be automatically shared with technicians by:

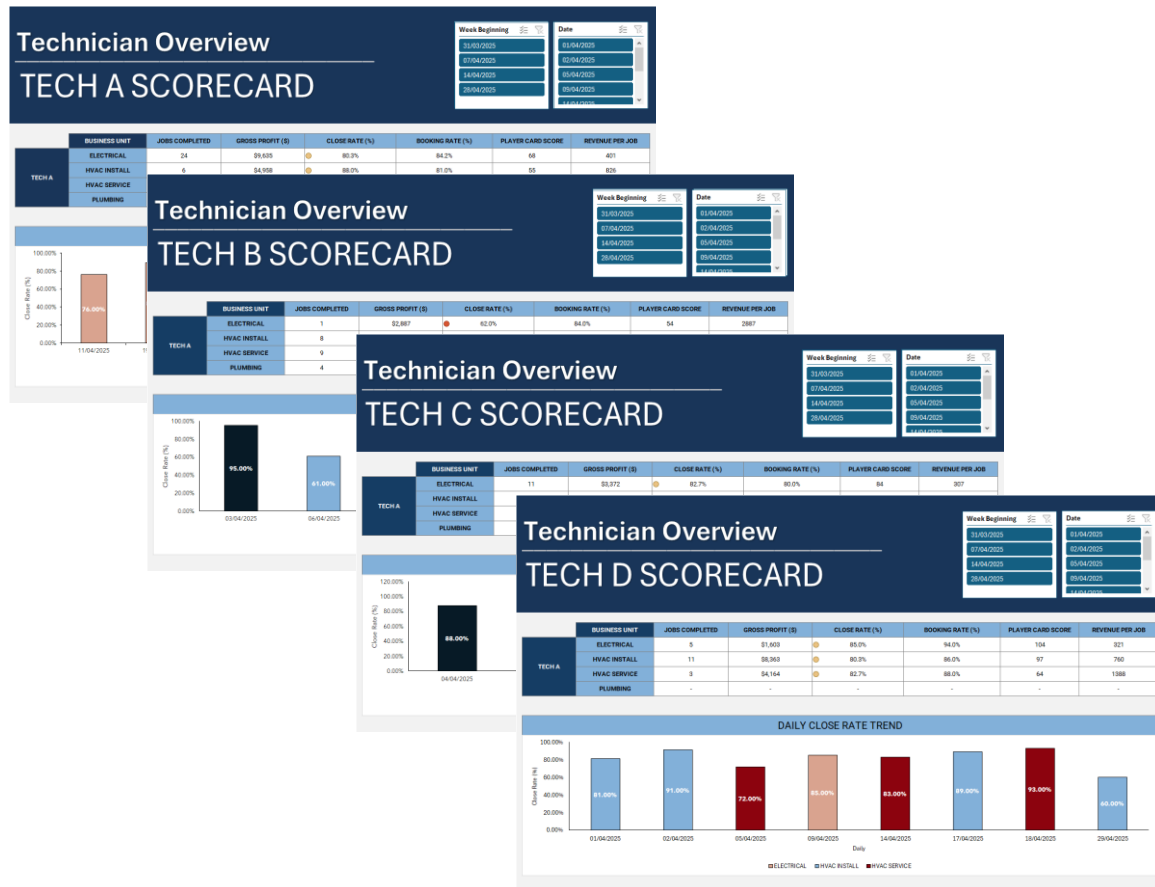
- > Exporting individual worksheets (e.g., TECH A, TECH B, TECH C) as PDFs.
- > Triggering automation when the Excel file is updated.
- > Distributing the correct PDF to each technician based on assigned rules in Power Automate (e.g., only send "TECH A" tab to Tech A).

EXCEL DASHBOARD

Technician Dashboard

2. Report Structure

- Each technician has a dedicated page showing only their performance data.

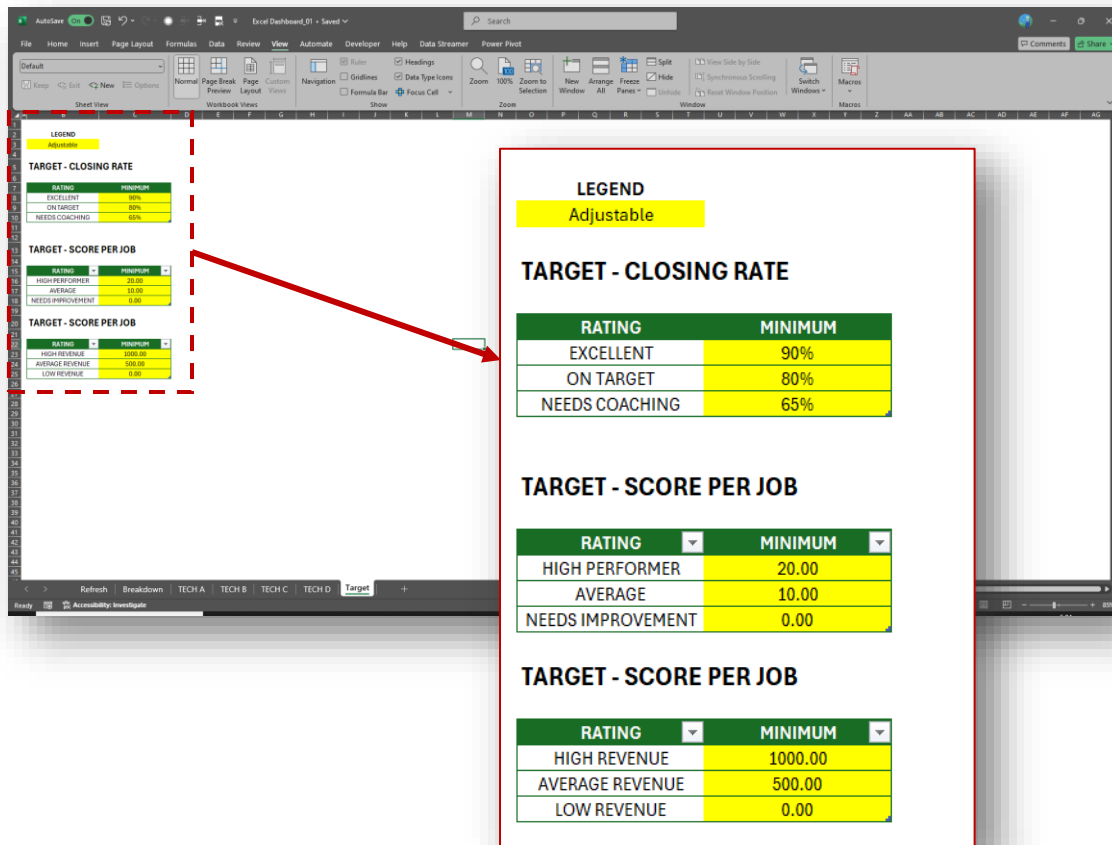


EXCEL DASHBOARD

Technician Dashboard

3. Conditional Formatting

- Highlights key issues and top performers at a glance:
 - Close Rate: Flags underperformers for follow-up or training.
 - Revenue per Job: Shows who brings in high or low value.
 - Score per Job: Helps compare techs fairly no matter how many jobs they do.



THANKYOU