Growth Action Plan

Apex Field Services | Web Apps

Lead: Trevor James | Primary Goal: Build/improve web app

Industry: Field Service Operations
Team Size: 73 employees

Traffic/Users: 140 internal users; 3,800 jobs/month
Expected first measurable gains: 2-6 weeks

1) Executive Summary

- Likely bottleneck: Disconnected systems increase dispatch errors and delays.
- Fastest path: Build dispatch board + mobile technician status updates
- Expected impact: Reduce scheduling conflicts 15% (High confidence).
- Context: Technician dispatch, parts tracking, and customer updates are split across legacy tools.

2) Opportunity Diagnosis

- Primary: Disconnected systems increase dispatch errors and delays.
- Secondary: Lack of mobile-first workflows hurts field adoption.
- Assumption: Assumes existing ERP can expose core job data.

3) 30-60-90 Plan (Outcome-Based)

Window	Focus	Action	Impact	Confidence
0-30 days	Core Flow	Build dispatch board + mobile technician status updates	Reduce scheduling conflicts 15%	High confidence
31-60 days	Inventory	Add parts request and availability checks	Cut repeat visits 8-12%	Medium confidence
61-90 days	Customer	Automate customer ETA and completion updates	Raise CSAT and reduce inbound calls	Medium confidence

4) Top 5 Priority Actions

1. Prioritize one field workflow with highest daily volume.
2. Design mobile interaction to complete updates in under 20 seconds.

Projected KPI Direction (30/60/90)

3. Add alerting for overdue jobs and missing parts.
4. Track jobs completed/tech/day before and after rollout.
5. Run weekly feedback loop with 5 technicians.

30d   60d   90d

5) Offer Recommendation + KPI Scorecard

Recommended: Web Apps (Primary), AI Automation (Secondary). Track weekly: Throughput, repeat-visit rate, app adoption.

6) Risks & Mitigation

- Risk: Legacy integration delays. Mitigation: staged sync and fallback exports.
- Risk: Field usability issues. Mitigation: rapid mobile usability tests.
- Risk: Data latency. Mitigation: near-real-time sync for critical events.

7) Immediate Next Step

Prototype the dispatch + technician status flow for one district and validate cycle-time improvement in week one.

"If useful, I can turn this into a hands-on execution sprint with milestones, owners, and delivery dates."

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