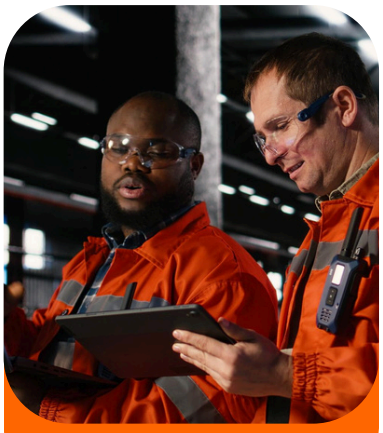
track works
SERVICE PROVIDER'S SOLUTIONS





The Field Service Ops Audit

20 Questions to Find Your Leaks

2026

Answer honestly. Every no or partially is a workflow gap that is costing you time and money right now.

"You cannot fix what you cannot see. This audit shows you exactly where to look."

trackworks.co

Table Of Contents

01 Scheduling & Dispatch

02 Work Orders & Job Documentation

04 Time Tracking & Invoicing

05 Materials & Job Cost

06 Reporting & Visibility

07 Systems & Scalability

08 How To Read Your Score



HOW TO USE THIS AUDIT

Your 20-question workflow gap finder

Go through every question. Answer YES, NO, or PARTIALLY for each one. Be honest — the goal is not to grade yourself. The goal is to find the gaps that are costing you money right now.

Count your NO and PARTIALLY answers at the end. That number is your starting point.

SECTION 1 — SCHEDULING & DISPATCH

Q01 Can every technician see their full schedule for the day without calling the office?

Why it matters: If techs are calling for their schedule, you are losing at least 10 minutes per tech per day to unnecessary communication.

YES | NO | PARTIALLY

Q02 When a job changes or gets rescheduled, does the update reach the tech automatically?

Why it matters: Manual update chains create errors and delays. One missed update can cost you a job or a customer.

YES | NO | PARTIALLY

Q03 **Can you see every active job and every technician's status in real time from one screen?**

Why it matters: Blind dispatch is reactive dispatch. Visibility is what separates managers from firefighters.

YES | NO | PARTIALLY

Q04 **Can you assign a new job to the right technician in under 2 minutes?**

Why it matters: Every minute of dispatch delay is a minute of unbilled time sitting in someone's day.

YES | NO | PARTIALLY

SECTION 2 — WORK ORDERS & JOB DOCUMENTATION

Q05 **Is a work order created for every single job before the technician arrives on site?**

Why it matters: No work order means no documentation, no accountability, and no billing protection.

YES | NO | PARTIALLY

Q06 **Do technicians complete job notes, photos, and customer sign-off before leaving the site?**

Why it matters: Documentation done after the fact is documentation done wrong. It costs you in disputes and delays.

YES NO PARTIALLY

Q07 **Can you pull up the complete history of any job or customer in under 60 seconds?**

Why it matters: If finding information requires asking a person, that information is a liability.

YES NO PARTIALLY

Q08 **Are work orders connected directly to invoicing so there is no re-entry of data?**

Why it matters: Every time data is re-entered manually, it introduces errors and costs time.

YES NO PARTIALLY

SECTION 3 — TIME TRACKING & INVOICING

Q09 **Do technicians clock in and out at the job level, not just the workday level?**

Why it matters: Day-level time tracking tells you nothing about job profitability. Job-level tracking tells you everything.

YES | NO | PARTIALLY

Q10 **Are invoices sent within 24 hours of job completion?**

Why it matters: Every day between job close and invoice sent is a day your revenue is sitting uncollected.

YES | NO | PARTIALLY

Q11 **Are invoices generated directly from work order data without manual re-entry?**

Why it matters: If your billing team is re-typing job information into invoices, you are paying twice for the same work.

YES | NO | PARTIALLY

Q12 **Do customers receive invoices digitally with an attached payment link?**

Why it matters: Paper invoices take longer to pay. Digital invoices with payment links get paid faster.

YES NO PARTIALLY

SECTION 4 — MATERIALS & JOB COST

Q13 **Do technicians log every part and material used inside the work order before leaving the site?**

Why it matters: Unlogged materials are unbilled materials. Every part that does not make it onto an invoice is margin lost.

YES NO PARTIALLY

Q14 **Can you see the total cost of a job (labor plus materials) before the invoice goes out?**

Why it matters: If you do not know job cost before billing, you are guessing at profitability.

YES NO PARTIALLY

Q15 **Are purchase orders created inside your system when materials need to be ordered?**

Why it matters: Purchasing outside the system is purchasing without accountability.

YES | NO | PARTIALLY

SECTION 5 — REPORTING & VISIBILITY

Q16 **Can you pull a technician productivity report in under 2 minutes?**

Why it matters: If measuring performance requires a manual process, performance is not being managed.

YES | NO | PARTIALLY

Q17 **Do you review open invoices and outstanding payments at least once a week?**

Why it matters: Outstanding invoices that are not reviewed are outstanding invoices that do not get paid.

YES | NO | PARTIALLY

Q18 **Can you see which jobs are running over budget or over time before they close?**

Why it matters: Real-time job cost awareness is what separates proactive managers from reactive ones.

YES NO PARTIALLY

SECTION 6 — SYSTEMS & SCALABILITY

Q19 **Do all your technicians use one single app for scheduling, work orders, time tracking, and documentation?**

Why it matters: Every additional tool your team uses is an additional place for information to get lost.

YES NO PARTIALLY

Q20 **Could your operation run for a full week without you being physically present or available by phone?**

Why it matters: If the answer is no, you have a systems problem. Not a people problem.

YES NO PARTIALLY

HOW TO READ YOUR SCORE

- **0–3 gaps** — Strong foundation. Focus on tightening what you have. TrackWorks can take you from good to exceptional.
- **4–8 gaps** — Moderate gaps. You have good people but the wrong systems holding them back. Start with billing and work orders.
- **9–14 gaps** — Significant gaps. Your operation is running on effort instead of systems. Start at Section 1 and work through.
- **15–20 gaps** — Critical gaps. Your team is losing significant time and revenue every week. This is your roadmap — start today.

YOU FOUND YOUR GAPS. NOW LET'S CLOSE THEM.

BOOK A FREE WORKFLOW AUDIT CALL

We will walk through your specific audit results, identify your top three priorities, and show you exactly how TrackWorks closes each gap. No pitch. Just answers.

+1-786-723-1192

sales@trackworks.app

95 Merrick Way, Coral Gables, FL

trackworks.co