

FICTIONAL WORKED EXAMPLE

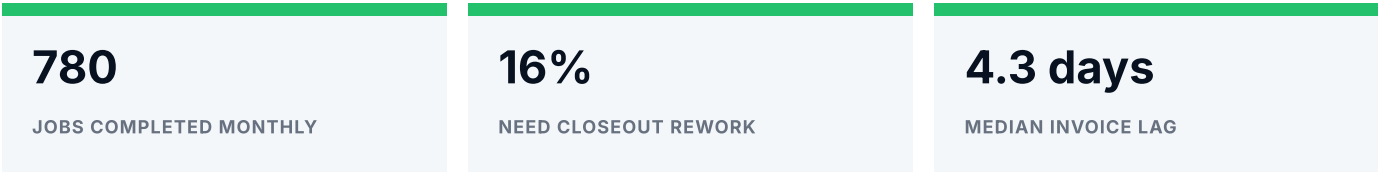
Job closeout to customer invoice

A field-service example showing how incomplete closeout records create rework, invoice delay and commercial leakage. The organisation and every figure are fictional.

FIELD SERVICE

ONE WORKFLOW

DECISION PACK



EXECUTIVE ANSWER

Billing is waiting for evidence from the field.

The invoice queue is the last visible step. Most delay enters when technicians close jobs without complete labour, materials, customer sign-off or approved variation records.

RECOMMENDED PATH

Fix closeout controls before automating billing.

Make the required field evidence clear, surface incomplete jobs before they reach Finance and route genuine exceptions to named owners. Use AI only to classify free-text notes after the basic records are complete.

DECISION

Proceed, with conditions

- One service region and two job types
- No autonomous invoice release
- Customer sign-off remains authoritative
- Six-week pilot and four-week baseline
- Stop if field completion time or dispute rates worsen

Illustrative recommendation only. This is not a client outcome or promised result.

EVIDENCE REGISTER

EVIDENCE	CONFIDENCE	FINDING
Job and invoice export	High	16% closeout rework
Closeout sample	Medium	24 minutes per affected job
Credit and dispute ledger	High	\$31,000 annualised
Variation review	Medium	\$25,000 annualised at risk
Dispatcher interviews	Medium	Symptoms and ownership gaps confirmed

02 · WHAT KEEPS RECREATING THE PROBLEM

The delay enters before Finance sees the job.

Incomplete closeout records force dispatchers, supervisors and billing staff to reconstruct what happened after the technician has moved on.

ROOT-CAUSE PATTERN

34%

Customer sign-off missing

The visit is complete but acceptance evidence is absent.

27%

Materials not coded

Parts used in the field do not reconcile to the job.

21%

Variation not approved

Extra work lacks a commercial decision.

11%

Labour record incomplete

Travel, overtime or attendance is missing.

7%

Free-text closeout unclear

Billing cannot determine the delivered scope.

INTERVENTION OPTIONS

A

Add billing capacity

Works the queue faster but leaves field evidence incomplete.

B

Use AI to draft every closeout

May improve notes but cannot create missing sign-off, parts or authority.

C

Fix closeout controls, then add narrow classification

Prevents the largest gaps and uses AI only where free text is the remaining problem.

D

Replace the field-service platform

The observed evidence does not yet justify the cost or disruption.

ILLUSTRATIVE ECONOMICS

50 hrs

MONTHLY CAPACITY RELEASED

\$56k

ANNUAL COMMERCIAL EFFECT

\$122k

GROSS ANNUAL VALUE HYPOTHESIS

Why it qualifies: the fictional model combines about \$66,000 in annual capacity value at a \$110 loaded hourly rate with about \$56,000 in avoided credits and recovered billable variation. That clears the \$100,000 investigation guide. Capacity is not cash, and the commercial effect requires Finance verification.

03 · IMPLEMENTATION DECISION

Improve field evidence without slowing the technician.

BOUNDED IMPLEMENTATION

What changes

- Job-type-specific closeout requirements
- Customer sign-off capture and exception path
- Parts and labour completeness checks
- Variation approval before invoice release
- Narrow classification of free-text closeout notes

WHAT DOES NOT CHANGE

- No autonomous invoice release
- No generated customer acceptance
- No variation approval by the automation
- No removal of supervisor or Finance controls

STOP CONDITIONS

- Technician closeout time rises beyond tolerance
- Customer disputes increase
- False completeness checks exceed the threshold
- Field or commercial ownership remains unresolved

MEASUREMENT PLAN

Baseline before benefit

Closeout rework	16%
Median invoice lag	4.3 days
Handling time	24 min
Credits and disputes	\$31k pa
Variation at risk	\$25k pa

Observe weekly during the pilot and monthly for three months. Service Operations confirms closeout behaviour. Technology confirms system performance. Finance owns financial classification and verification.

ILLUSTRATIVE DECISION

Proceed with Option C.

Pilot one region and two job types. Preserve customer acceptance and financial approval. Expand only if invoice lag, rework and dispute rates improve without increasing technician closeout time.

What a real diagnostic would add: named owners, source references, data lineage, confidence notes, implementation dependencies, control sign-off and an executive readout grounded in the buyer's evidence.

This document demonstrates the format and evidence discipline only. It is not a case study, testimonial or promised outcome.

PRESSURE-TEST ONE WORKFLOW