

Summit Service Plumbing

PREPARED BY

Chris Aldridge

Aldridge Operational Consulting

SERVICE AREA

San Diego County, California

Remote-first consulting

Demonstration disclaimer

Summit Service Plumbing is a fictional company. All company information, operational data, scenarios, performance baselines, targets, and results in this document are illustrative and do not represent an actual client engagement.

A growing business with an operating system that has not kept pace

Summit Service Plumbing is a fictional 12-person residential plumbing company serving San Diego County. The business has grown from an owner-led operation into a multi-technician service team, but core workflows still rely on verbal instruction, text messages, individual habits, and owner judgment.

The consulting objective is to standardize the most important handoffs - customer intake, dispatch, technician closeout, invoicing, and escalation - without adding unnecessary bureaucracy or expensive technology.

Primary objective

Create a repeatable service workflow that improves information quality, shortens invoice turnaround, reduces administrative rework, and decreases routine owner involvement.

Company snapshot

12	8	35-45	4
Employees	Field technicians	Service calls / week	Core service lines

Industry	Residential plumbing services
Service area	Central and North San Diego County
Business stage	Growing owner-led service company
Operating model	Field technicians supported by office and dispatch staff
Primary challenge	Informal processes creating inconsistent handoffs and rework

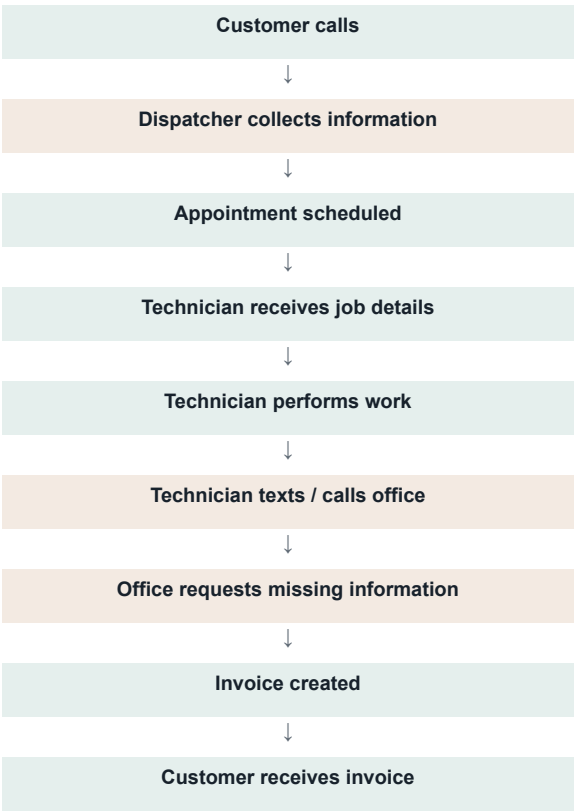
Project priorities

- Standardize customer intake so technicians begin each job with complete, consistent information.
- Define a single technician closeout standard for notes, photos, customer acknowledgment, payment status, and follow-up.
- Reduce office rework by making required information complete at the source.
- Define decision authority so routine issues do not automatically escalate to the owner.
- Establish a small KPI set that makes process performance visible and manageable.

Where the service workflow breaks down

Growth has increased the number of handoffs between customers, dispatchers, technicians, office staff, and the owner. Because the company never formalized the minimum information required at each handoff, employees have developed different ways of completing the same work.

CURRENT WORKFLOW



OBSERVED BREAKDOWNS

- 1. Intake varies by dispatcher**
Required customer, property, and service details are not consistently captured.
- 2. Job information is incomplete**
Technicians may begin work without complete issue descriptions, access information, or prior-history context.
- 3. Closeout is informal**
Technicians use texts, calls, notes, and separate photos rather than one required completion record.
- 4. Office staff chase information**
Missing photos, materials, signatures, and payment status create administrative rework.
- 5. Invoicing depends on follow-up**
The office cannot consistently finalize invoices until technician information is complete.
- 6. Owner becomes the default**
Routine scheduling, pricing, service-recovery, and escalation questions flow back to the owner.

Illustrative baseline

	Fictional review period In a hypothetical four-week sample of 164 completed service calls, 45 jobs required additional information before invoicing, 31 were missing at least one required photograph, 17 lacked customer acknowledgment, and 28 required office follow-up with the technician.
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Three findings explain most of the operational friction

1

Incomplete customer intake

Observation: Dispatchers do not use a standard intake form. The depth and quality of information depend on which employee answers the call.

Business impact: Technicians may arrive without the equipment type, exact problem, access instructions, urgency, or customer expectations. This increases avoidable calls and diagnostic time.

Root cause: No formally defined minimum intake standard.

Recommendation: Create a required customer-intake checklist and make completion of the required fields part of the scheduling process.

2

Inconsistent technician closeout

Observation: Technicians submit job completion information through text messages, phone calls, scheduling notes, photos, and handwritten information.

Business impact: Photos, parts used, customer acknowledgment, payment status, and follow-up requirements may be missing. Office staff must reconstruct the job before invoicing.

Root cause: No single definition of a complete job record.

Recommendation: Implement one job-closeout SOP and checklist that defines what must be submitted before a job is marked complete.

3

Excessive owner involvement

Observation: Routine questions about scheduling exceptions, minor service recovery, return visits, and pricing decisions frequently escalate to the owner.

Business impact: Decisions slow down, employees become dependent on the owner, and the owner loses time that should be spent on higher-value business work.

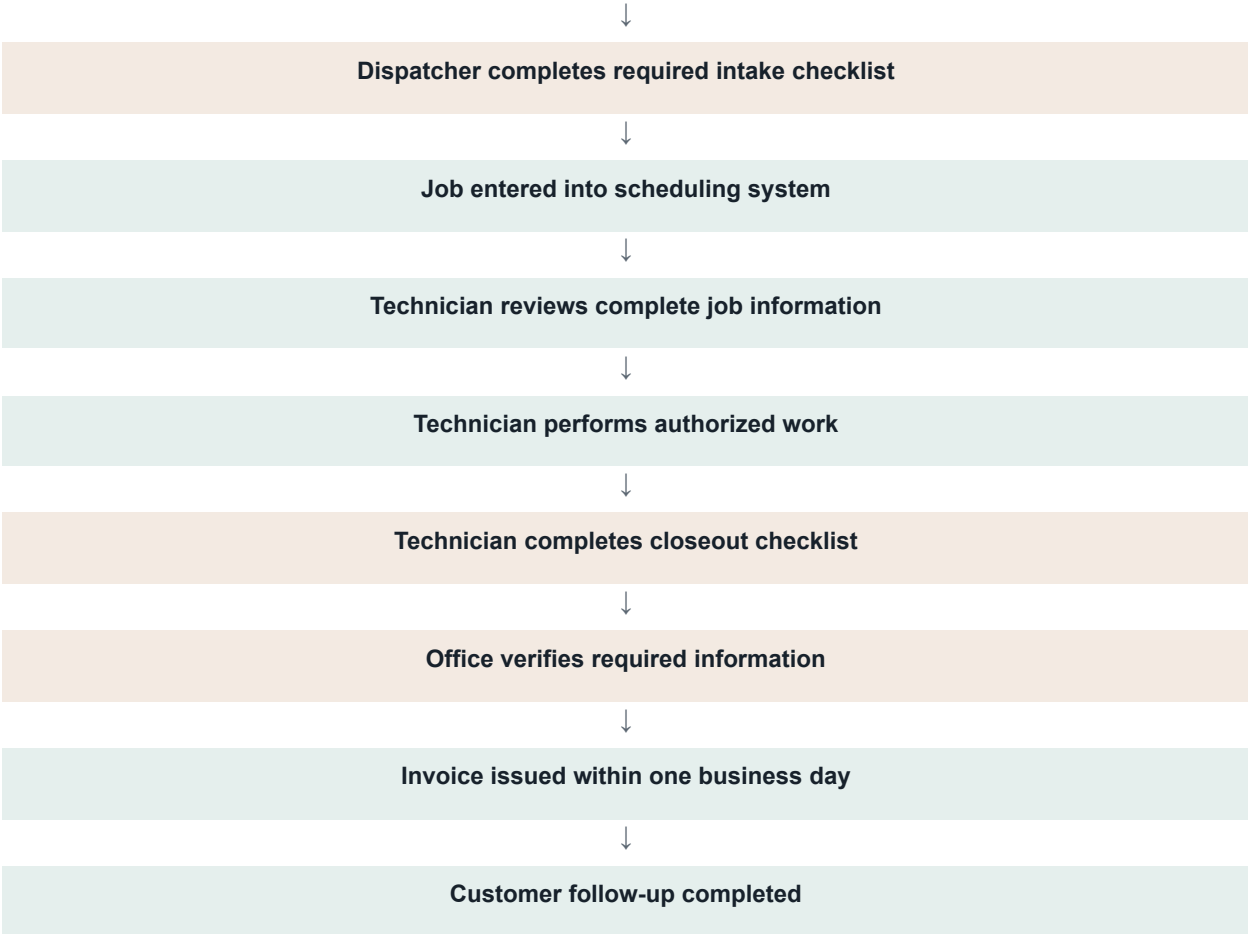
Root cause: Decision rights did not evolve as the organization grew.

Recommendation: Create a simple escalation matrix defining what technicians, dispatchers, the office manager, and the owner can decide independently.

A simpler, controlled service workflow

The proposed future state adds clear minimum requirements at four control points: intake, technician preparation, job closeout, and office verification. The goal is consistency, not additional layers of approval.

Customer contacts company



Sample escalation matrix

Situation	Technician	Dispatcher	Office Manager	Owner
Standard appointment reschedule	Notify	Approve	Oversight	Not required
Arrival-time question	Notify	Handle	Escalation only	Not required
Return visit for incomplete work	Recommend	Schedule	Approve	High-cost exception
Minor service credit up to \$50	Recommend	-	Approve	Not required
Credit greater than \$50	-	-	Recommend	Approve
Customer complaint	Document	Receive	Initial resolution	Serious escalation
Property damage allegation	Report immediately	-	Document	Immediate escalation

Technician Job Closeout Procedure

Document ID	SSP-OPS-001
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Department	Field Operations
Process Owner	Office Manager / Field Operations Lead
Version	1.0
Review Cycle	Annual or following significant process change

Purpose

Ensure every completed service call contains the information required for accurate invoicing, customer communication, service history, inventory tracking, quality review, and future follow-up. Consistent closeout documentation reduces administrative rework and improves communication between field and office teams.

Scope

Applies to all technicians completing residential service calls, including standard repairs, drain services, water-heater work, emergency calls, and scheduled follow-up work. Safety situations and system outages may require temporary deviation, but documentation requirements remain in effect.

Responsibilities

- Technician - completes required job documentation, photos, materials, payment status, customer communication, and exception reporting.
- Office Manager - monitors completion, reviews exceptions, requests corrections, and tracks recurring documentation issues.
- Owner - becomes involved only when the situation exceeds established employee authority or presents material financial, legal, safety, or customer risk.

Procedure | Steps 1-4

1. Confirm work completion

Verify the reported issue was addressed, work was tested where applicable, the area was left in reasonable condition, and any unfinished work or additional customer concerns are documented.

2. Record final diagnosis

Describe the diagnosed problem clearly enough that another employee can understand what occurred without calling the technician. Example: "Kitchen sink drainage restricted by grease accumulation approximately 15 feet into branch line."

3. Record work performed

Document what was actually completed, including test or verification performed. Avoid vague descriptions such as "fixed drain."

4. Record parts and materials

List parts and materials used when applicable to support invoicing, inventory management, and future service history.

Technician Job Closeout Procedure

5. Upload required photographs

Upload at least one before and one after photograph when relevant. Add equipment labels, serial numbers, property condition, damage, access issues, or recommended repair photos when they materially support the service record.

6. Communicate with the customer

Explain what was found, what work was completed, whether the issue appears resolved, recommended future work, and any condition the customer should monitor. Provide an opportunity for questions.

7. Obtain customer acknowledgment

Collect required acknowledgment or signature under company policy. If the customer refuses or is unavailable, document the reason and the method of approval, if any.

8. Record payment status

Select the applicable status: paid in full, partial payment, payment pending, invoice required, financing used, or payment issue requiring office follow-up. The field may not be left blank.

9. Identify follow-up requirements

Indicate no follow-up, additional repair recommended, part order, return visit, estimate, customer contact, or warranty review. Provide enough context for office staff to act without additional clarification.

10. Submit the job

Submit the completed record before leaving the property whenever practical. The job should not be marked complete until all required information is entered.

Immediate escalation

- Customer allegation of property damage or significant complaint.
- Safety concern or work that cannot be completed safely.
- Unauthorized-work or payment dispute.
- Missing authorization, potential warranty dispute, or situation outside established employee authority.

System outage procedure

Complete the service call normally, capture required photos using the approved device, record required information in the temporary approved format, notify the office of the outage, and upload the complete record when system access is restored.

Quality standard

A completed job record should allow an office employee who was not present to understand why the customer requested service, what the technician found, what work was performed, what materials were used, whether payment was complete, and whether additional action is required.

Technician Closeout Checklist

A one-page checklist translates the SOP into a tool technicians can use in the field. In an actual engagement, this would be configured in the client's existing field-service or work-order system wherever possible.

JOB IDENTIFICATION

- ☐ Customer name confirmed
- ☐ Service address confirmed
- ☐ Job number confirmed
- ☐ Arrival and completion times entered

DIAGNOSIS & WORK

- ☐ Reported issue reviewed
- ☐ Final diagnosis documented clearly
- ☐ Work performed documented
- ☐ Parts and materials recorded
- ☐ Work tested when applicable
- ☐ Work area left in reasonable condition

PHOTOGRAPHS

- ☐ Before photograph uploaded
- ☐ After photograph uploaded
- ☐ Equipment / serial information captured when required
- ☐ Unusual property condition documented when applicable

CUSTOMER COMPLETION

- ☐ Work performed explained
- ☐ Customer questions addressed
- ☐ Future recommendations explained
- ☐ Customer acknowledgment obtained when required

PAYMENT

- ☐ Payment status entered: paid / invoice / financing / partial / issue

FOLLOW-UP

- ☐ No additional action required OR return visit / part order / estimate / customer contact / manager follow-up selected

FINAL SUBMISSION

- ☐ Required documentation complete
- ☐ Exceptions documented
- ☐ Required escalations submitted
- ☐ Job marked complete
- ☐ Record submitted before leaving whenever practical

A small KPI set makes the new process manageable

The purpose of measurement is not to create a reporting burden. Four metrics are sufficient to determine whether the workflow is producing better information, faster invoicing, and less rework.

KPI	Illustrative baseline	30-day target	Longer-term target
Complete job documentation rate	73%	90%	95%+
Average invoice turnaround	1.8 business days	1.2 business days	<= 1 business day
Documentation follow-up rate	17%	< 10%	< 5%
Routine owner escalations	22 / week	< 15 / week	< 8 / week

All baselines and targets above are fictional examples for portfolio demonstration. Actual targets would be established with the client after reviewing real operating data.

Metric definitions

Complete job documentation rate

Percentage of completed jobs containing all required documentation without office follow-up.

Average invoice turnaround

Average business time between technician job completion and invoice issuance.

Documentation follow-up rate

Percentage of completed jobs requiring office staff to contact the technician for missing information.

Routine owner escalations

Number of routine operating decisions escalated to the owner each week.

How the measures would be used

- Review trends weekly during the first 30 days rather than reacting to individual mistakes.
- Separate employee misses from unclear procedures, system limitations, customer exceptions, and legitimate operational exceptions.
- Use recurring exceptions to improve the process, training, or system configuration.
- Shift to monthly review once the process reaches a stable operating level.

30-day implementation plan

The rollout is intentionally short. The first week establishes the standard, the second trains the team, the third tests the process under real operating conditions, and the fourth converts lessons from the pilot into the final operating model.

Week	Focus	Core actions	Primary owner	Desired result
1	Finalize standards	Approve intake, closeout, escalation rules and KPI definitions. Configure fields and finalize reference documents.	Owner + Office Manager	One approved operating standard.

2	Train team	Train dispatchers, technicians and manager using examples, job scenarios and quick-reference materials.	Office Manager	Employees understand the process before it becomes mandatory.
3	Pilot and stabilize	Use the workflow on all standard service calls. Categorize exceptions and capture employee feedback.	Office Manager + Team	Process problems identified and corrected.
4	Review and finalize	Review documentation rate, invoice turnaround, escalations and feedback; refine the process and assign ongoing ownership.	Owner + Office Manager	Stable process with measurable standards.

Expected operational benefits

- More consistent customer intake and technician preparation.
- Fewer missing photos, signatures, materials, and payment details.
- Less office time spent reconstructing completed jobs.
- Faster and more predictable invoice preparation.
- Clearer employee accountability and escalation authority.
- A stronger foundation for onboarding and future growth.

Case study conclusion

Summit Service Plumbing's fictional challenge is representative of a common growth problem: the company has added people and volume faster than it has formalized the operating system connecting them. The recommended solution is not a large software implementation or a thick policy manual. It is a small number of clear standards at the handoffs where information is most likely to be lost.

By standardizing customer intake, technician closeout, office verification, and escalation authority, the business can reduce administrative rework and owner dependency while creating a more repeatable customer experience.

What this case study demonstrates

Aldridge Operational Consulting's approach: understand the current workflow, identify the operational bottleneck, define a practical future state, convert it into usable SOPs and field tools, establish measurable outcomes, and support implementation.