Briostack BY EVERPRO

Field Service Visibility Checklist

Find where updates get lost between your office and technicians, then pick the one handoff to fix first. For growing pest control and lawn treatment businesses.

How to use it: Pick a recent day that didn't go as planned, like a sick-day route or a rain-delayed treatment round. Work through each section with that day in mind. Anything you can't check off is a handoff worth a closer look.

1 Quick check: five questions

Answer honestly for how things work today, not how they're supposed to work.

1	Can your office see which appointments are complete or delayed without calling technicians?	☐ Yes	☐ No
2	Can technicians access the latest schedules and customer instructions in the field?	☐ Yes	☐ No
3	Are service notes and treatment details recorded promptly and available for future visits?	☐ Yes	☐ No
4	Can office staff answer customer questions using the information already on file?	☐ Yes	☐ No
5	When schedules change, does everyone get the updates they need without extra follow-ups?	☐ Yes	☐ No

0–1 "No"
Your process is mostly working. Small habit changes may close the gaps.

2–3 "No"
You have a handoff gap. Those questions show where updates get lost.

4–5 "No"
Your tools may be creating the extra work. See Section 3.

2 Handoff checks by service stage

Check each statement that's true for your team today.

1 Before the visit

- ☐ Schedule changes reach the technician before they head out
- ☐ Access details (gate codes, pets, locked areas) are on the job record
- ☐ Customer requests are noted where the technician will see them

2 During service

- ☐ The office can see job status without calling the technician
- ☐ Technicians can flag access problems or skipped areas from the field
- ☐ Weather stops or blocked access get rescheduled without a chain of calls

3 After service

- ☐ Service notes are finished the same day, not rebuilt later
- ☐ Treatment and chemical application details are recorded every visit
- ☐ Follow-up recommendations are captured, not just remembered

4 Office follow-up

- ☐ Staff can answer "when are you coming?" and "what did you apply?" from the record
- ☐ Completed work moves to billing without re-entering details
- ☐ Re-services and follow-ups are tracked until they're done

3 Is it your process or your tools?

Not every visibility problem needs new software. Check what sounds familiar.

Likely a process fix

Clearer rules and ownership may be enough.

- [ ] The information exists, it just isn't shared the same way every time
- [ ] Nobody clearly owns schedule changes or note deadlines
- [ ] One or two handoffs cause most of the extra calls

Likely a tools problem

Better habits only go so far.

- [ ] Office staff enter the same customer details into more than one system
- [ ] A schedule change takes several calls or texts to reach everyone
- [ ] Technicians can't see service history while in the field
- [ ] Service records get copied or transferred before billing

Mostly left column? Start with a clear owner and a deadline for each handoff. **Two or more on the right?** Your tools are probably adding work, and it may be time to look at a more connected system.

4 Your one handoff to fix first

Pick the single handoff that causes the most repeated calls or rework. Fix that one before anything else.

The handoff that causes the most rework

What information needs to move

Who owns sharing it

When it needs to be available

How we'll know it's working

For example: fewer check-in calls, notes done by end of day

Start date:

Review date:

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- How a sick-day route gets reassigned in one move
- How techs log chemical applications in the app, even offline
- How billing and AutoPay cut down office work

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