

How a Fire & Life Safety Services Provider Turned Fragmented Field Data into Day-to-Day Operational Intelligence



THE CHALLENGE

- **No Single Source of Truth:** Operational data sat in the field service system with no consolidated view, leaving leadership without clear visibility into technician utilization, profitability, or workload.
- **Limited Performance Visibility:** Leaders could not easily see how billable time, revenue, and margin varied across regions, service lines, and individual technicians making staffing and scheduling decisions reactive rather than data-driven.
- **Untracked Inspection Backlog:** Scheduled-but-incomplete inspections were difficult to quantify, creating revenue-at-risk blind spots.
- **Fragmented Sales Reporting:** Proposal and booking data lived in separate dashboards, with no unified view of the sales funnel or team activity.

OUR SOLUTION



Technician Utilization & Profitability Dashboards

Tableau dashboards tracking billable vs. non-billable hours against efficiency benchmarks, with revenue, gross profit, and margin visible per technician, service line, and region.



Drill-Down Operational Reporting

A consolidated-to-technician reporting hierarchy giving leadership one source of truth from company-wide performance down to the individual level plus clear visibility into the inspection backlog.



Unified Sales Productivity Dashboard

Previously separate proposals and bookings dashboards merged into a single funnel view, supported by activity reporting that helps sales managers track team performance.

IMPACT

01

Embedded in Daily Operations: The dashboards have become part of the client's day-to-day operations, with the team actively using them to run the business.

02

Decision-Ready Visibility: Leadership now moves from company-wide performance to individual technician detail in a few clicks, replacing manual data pulls with self-serve insight.

03

One View of the Sales Funnel: Sales leadership manages proposals, bookings, and team activity from a single dashboard instead of reconciling fragmented reports.