

Technician Scorecard Redesign

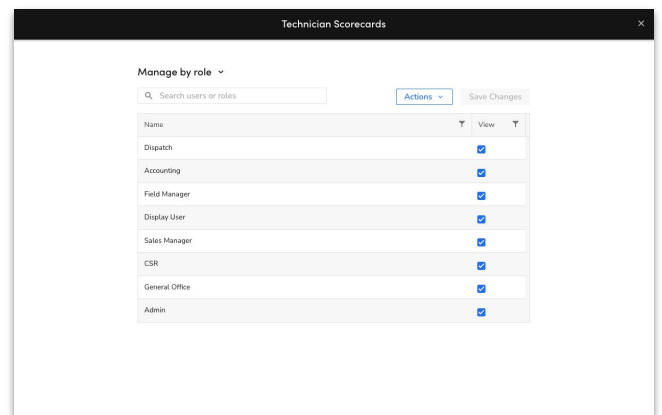
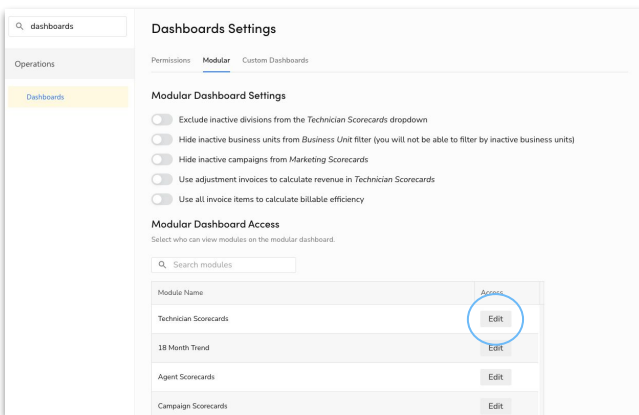
Gain confidence in your data to empower your technicians to reach their full potential.

Having accurate and consumable data is critical to every business. So, we redesigned Technician Scorecards to help you intelligently visualize and have confidence in your technician data. The Technician Scorecard redesign is automatically enabled for you with ST-60. There is no loss to the existing data - we've just improved the look and added a few things to make getting the information you need easier.

WHAT'S NEW

- ★ Change Filters
- ★ Tooltips for Every KPI
- ★ Export Any Data
- ★ View Technician Profiles
- ★ Improved User Interface (UI)

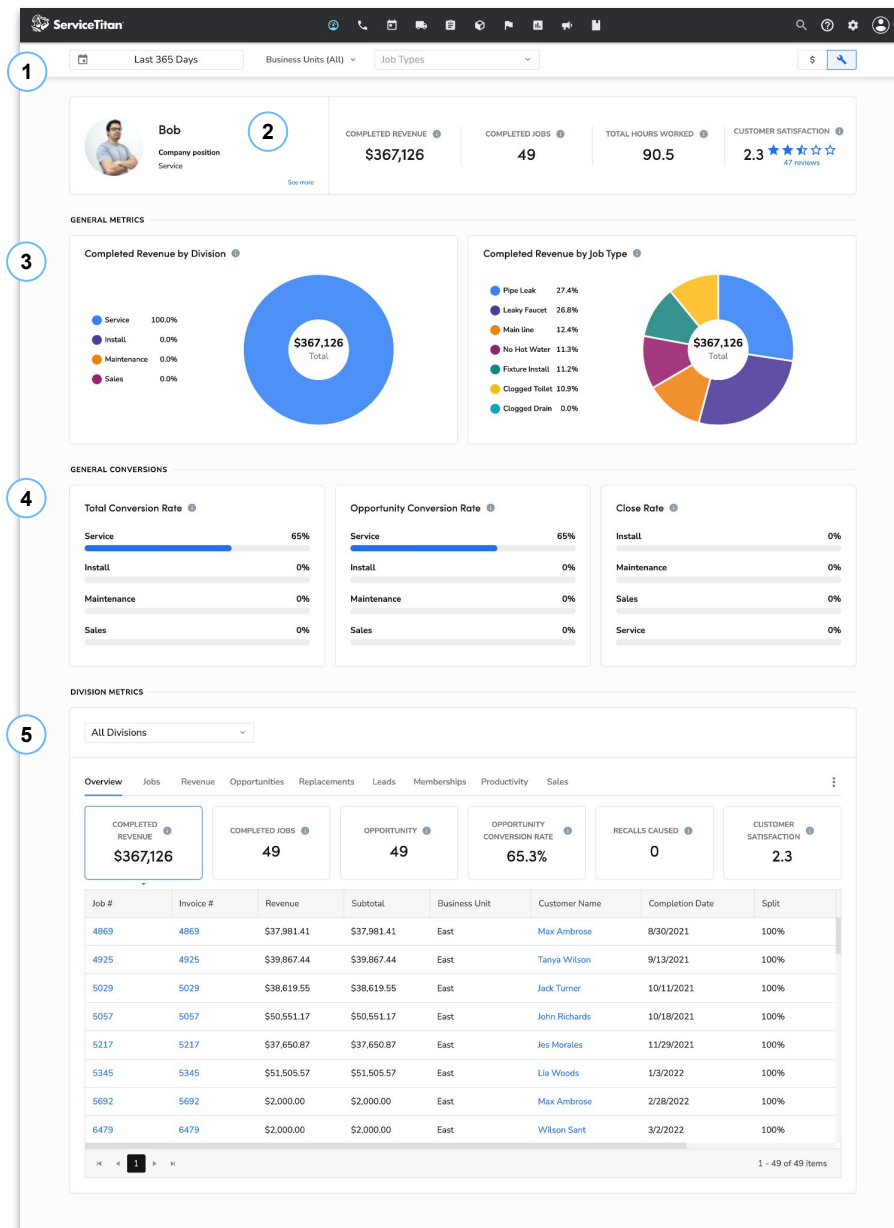
To access Technician Scorecards, you'll need to ensure you have the appropriate permissions. You can configure the proper permissions by going to Settings > Dashboards > Click **Modular** at the top of the page > then click **Edit** for **Technician Scorecards** and assign to applicable roles.



Technician Scorecards

You'll access Technician Scorecards just as you do today: from the Modular Dashboard, Custom Dashboards, or Technician's Performance Report.

Click on the numbers to learn about some of the changes.




Filters

Quickly adjust for the exact data you need with four new filters available on every scorecard. Previously, you had to change filters on the Modular Dashboard and then click back into the Technician Scorecard to see the filter adjustments.

- **Date Filter:** Filter by default or specific date ranges.
- **Business Units:** Filter by all or specific Business Units.
- **Job Types:** Filter by All active types, specific job types, or inactive job types.
- **Sales/Service Technician:** Easily click back and forth to see sales and revenue data for that technician.

Date Filter



Last 365 Days

Business Unit Filter


Business Units (All) ▾

Job Type Filter

Job Types ▾

Sales/Service Technician Filter

\$




Technician Details

Get a snapshot of your technician's work profile, Completed Revenue, Completed Jobs, Total Hours Worked, and Customer Satisfaction.

- **Technician Profile:** Access the Technician Profile in one click and make any changes to their profile information by clicking *Edit Profile Info*.
- **Completed Revenue:** Revenue generated from completed jobs.
- **Completed Jobs:** Number of jobs technician completed.
- **Total Hours Worked:** Number of hours technician worked.
- **Customer Satisfaction:** Technician's average survey rating for completed jobs.

COMPLETED REVENUE ⓘ	COMPLETED JOBS ⓘ	TOTAL HOURS WORKED ⓘ	CUSTOMER SATISFACTION ⓘ
\$367,126	51	93.9	2.3 ★★★★★ 49 reviews

Technician Profile



Bob
 Company position
 Service

See more

Personal Info

Company

Company Position
Service
 Technician Type
Manager
 Role
Technician
 Business Unit
East
 Team
NA
 Truck
Default Truck - Bob
 Inventory Warehouse
NA

Contacts
 Phone
(800) 155-0001
 Email
NA

Zones
 Main Zone
NA

Edit Profile Info

Technician - Bob

Edit Technician - Bob

Profile Payroll Performance

Profile Actions

Basic Info

About Technician


Technician Name*
 Bob

Company Position*
 Service

Technician Type*
 Manager

Business Unit
 East

Role
 Technician

Photo


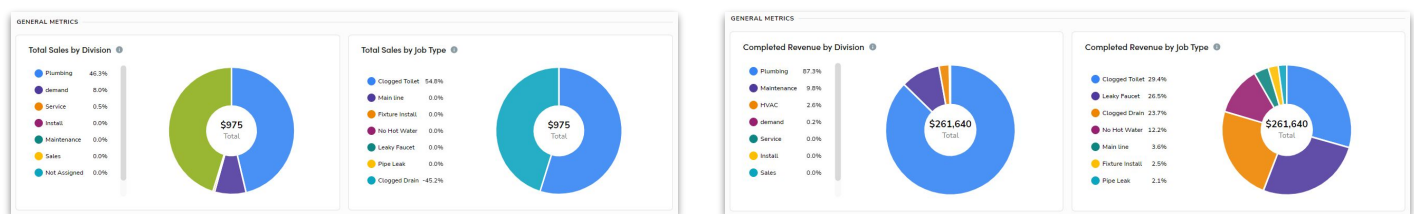
Biography
 Short biography of Bob.

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General Metrics

The General Metrics section will display two charts:

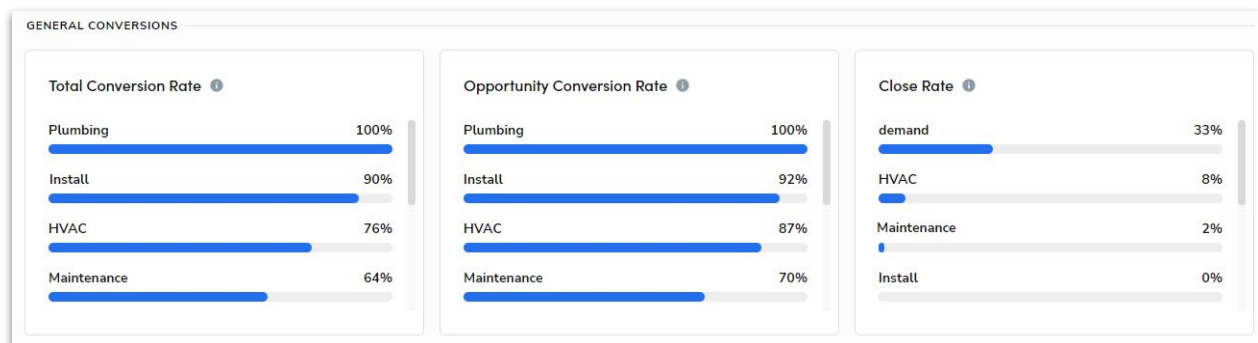
- For Sales, you'll see **Total Sales by Division** (sales generated from completed jobs in each division) and **Total Sales by Job Type** (sales generated from completed jobs by the job type).
- For Service, you'll see **Completed Revenue by Division** (revenue generated from completed jobs in each division) and **Completed Revenue by Job Types** (revenue generated from completed jobs by the job type).



General Conversions

The General Conversions section will display three charts:

- **Total Conversion Rate:** Number of converted jobs divided by the number of completed jobs.
- **Opportunity Conversion Rate:** Number of converted jobs divided by the number of opportunity jobs.
- **Close Rate:** Number of closed opportunities divided by the number of sales opportunities.



Filter by Division

DIVISION METRICS

Division Metrics								
All Divisions ▾								
Overview	Jobs	Revenue	Opportunities	Replacements	Leads	Memberships	Productivity	Sales
COMPLETED REVENUE ⓘ \$367,126	COMPLETED JOBS ⓘ 51	OPPORTUNITY ⓘ 51	OPPORTUNITY CONVERSION RATE ⓘ 62.7%	RECALLS CAUSED ⓘ 0	CUSTOMER SATISFACTION ⓘ 2.3			
Job #	Invoice #	Revenue	Subtotal	Business Unit	Customer Name	Completion Date	Split	
4869	4869	\$37,981.41	\$37,981.41	East	Max Ambrose	8/30/2021	100%	
4925	4925	\$39,867.44	\$39,867.44	East	Tanya Wilson	9/13/2021	100%	
5029	5029	\$38,619.55	\$38,619.55	East	Jack Turner	10/11/2021	100%	
5057	5057	\$50,551.17	\$50,551.17	East	John Richards	10/18/2021	100%	
5217	5217	\$37,650.87	\$37,650.87	East	Jes Morales	11/29/2021	100%	
5345	5345	\$51,505.57	\$51,505.57	East	Lia Woods	1/3/2022	100%	
5692	5692	\$2,000.00	\$2,000.00	East	Max Ambrose	2/28/2022	100%	
6479	6479	\$2,000.00	\$2,000.00	East	Wilson Sant	3/2/2022	100%	

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