

Field Technician Research Findings & Persona



8 survey responses

Field technician stakeholder group

Primary and industry research

Directional, but the answers were consistent.

HOME SERVICE OPERATIONS ECOSYSTEM

Field Technician Research Findings and Persona Report

8 Survey Responses , Field Technician Stakeholder Group , Primary and Industry Research

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Research Overview

This document presents primary research findings from a field technician survey conducted as part of the Home Service Operations Ecosystem project. The research explores the daily workflow, documentation challenges, communication practices, and operational pain points experienced by field service professionals.

Research Goals

- Understand how technicians receive and manage daily job assignments
- Identify documentation challenges and when reporting occurs
- Understand how technicians communicate with customers and dispatch
- Identify the most common operational inefficiencies and their impact
- Determine what tools and improvements would most benefit daily workflow

Participants

Detail	Value	Note
Total respondents	8	Survey Completed
Primary industry	Plumbing (most common)	Also electrical, home improvement, IT
Experience range	1 to 15+ years	75% have 8 or more years
Research approach	Primary survey plus industry research	Combined methodology

Important note:

With 8 responses, this data is directional rather than statistically conclusive. Findings were checked against industry articles reviewed during the competitive analysis.

Survey Findings

Years of Experience

Respondents represented a range of field service experience, with the majority being seasoned professionals.

Experience Level	Responses	% of Total
More than 15 years	3	37.5%
8 to 15 years	3	37.5%
4 to 7 years	1	12.5%
1 to 3 years	1	12.5%

Key finding:

75% of respondents have 8 or more years of field experience. They are experienced

professionals operating with tools and systems that are not keeping up with their workload.

How Often Does the Schedule Change During the Day?

Field technicians rarely work through a fixed schedule. The majority experience frequent changes throughout the day.

Schedule Change Frequency	Responses	% of Total
Frequently	5	62.5%
Sometimes	2	25.0%
Rarely	1	12.5%

Key finding:

62.5% of technicians experience frequent schedule changes during the day. Without real-time updates, these changes create confusion for both technicians and customers.

How Often Do Delays Affect the Schedule?

Delays are a consistent reality for field technicians, not an occasional exception.

Delay Frequency	Responses	% of Total
Sometimes	4	50.0%
Frequently	3	37.5%
Rarely	1	12.5%

Key finding:

87.5% of technicians experience delays sometimes or frequently. Combined with frequent schedule changes, this creates a cascading effect that impacts every customer on the day's schedule.

Who Is Responsible for Updating Customers?

Customer communication falls primarily on the technician, even during active service work (multiple choice).

Responsible Party	Responses	% of Total
Me, the technician	6	75.0%
Dispatch	4	50.0%
Shared responsibility	2	25.0%

Note: respondents could **select multiple options**. Total exceeds 8.

Key finding:

75% of technicians say they are personally responsible for customer updates. This means technicians are managing customer communication on top of driving, diagnosing, and performing service work. Automated updates would directly relieve this burden.

How Often Do Customers Contact Technicians Directly for Updates?

Customers actively reach out to technicians when they have no other source of information.

Contact Frequency	Responses	% of Total
Sometimes	3	37.5%
Frequently	2	25.0%
Multiple times per day	1	12.5%
Rarely	1	12.5%
Never	1	12.5%

Key finding:

75% of technicians are contacted by customers sometimes, frequently, or multiple times per day. Each of these contacts interrupts active work and is a direct symptom of the

visibility gap customers experience.

What Information Do Customers Ask For Most?

When customers reach out to technicians directly, these are the questions they most commonly ask **(multiple choice)**.

Information Requested	Responses	% of Technicians
Service details	6	75.0%
Arrival time	4	50.0%
Appointment status	3	37.5%
Technician location	2	25.0%
Delay updates	2	25.0%

Cross-stakeholder connection:

Customers are asking technicians directly for arrival time and service details because no automated system is providing this information. This matches exactly what the customer survey found: 58.3% of customers wanted an exact arrival time, and 75% of technicians say customers ask them for service details. The gap is the same from both sides.

How Do Technicians Document Completed Work?

Paper forms remain the dominant documentation method despite the availability of digital tools **(multiple choice)**.

Documentation Method	Responses	% of Total
Paper forms	7	87.5%
Text message to supervisor/dispatcher	6	75.0%
Photos	4	50.0%
Phone call to supervisor/dispatcher	3	37.5%

Email	2	25.0%
Computer or web-based system	2	25.0%
Ticketing system	1	12.5%

Key finding:

87.5% of technicians still use paper forms as their primary documentation method. This is the root cause of delayed, inaccurate, and incomplete reporting. Paper cannot be automatically shared, searched, or used to update customers or dispatch in real time.

When Do Technicians Complete Documentation?

The timing of documentation directly affects reporting accuracy. Reports completed later rely on memory(multiple choice).

Documentation Timing	Responses	% of Total
Immediately after each job	4	50.0%
During the appointment	2	25.0%
It changes daily	2	25.0%
End of shift	2	25.0%
Next day	1	12.5%

Key finding:

37.5% of technicians complete documentation at end of shift or the next day, relying on memory to reconstruct job details across multiple visits. This is a primary driver of reporting inaccuracies and missing information in service records.

How Long Does Documentation Take Per Job?

Reporting time varies significantly, adding up across a full day of multiple jobs.

Time to Complete Documentation	Responses	% of Total
Less than 5 minutes	2	28.6%
5 to 10 minutes	2	28.6%
11 to 20 minutes	1	14.3%
Varies significantly by job	2	28.6%
Not specified	1	14.3%

Have You Arrived at a Job Without the Necessary Materials?

Missing materials at the job site is one of the most impactful operational failures in field service.

Experienced Missing Materials	Responses	% of Total
Yes	6	75.0%
No	2	25.0%

Critical finding:

75% of technicians have arrived at a job without the necessary materials, parts, or equipment. This is not an occasional inconvenience. It is a systemic operational failure that cascades into delays, repeat visits, and unfinished work.

What Happened When Materials Were Missing?

Among 6 of the 8 technicians who experienced missing materials, these were the outcomes. Percentages are calculated out of 6, not 8 (**multiple choice**).

Outcome	Responses	% of All Technicians
Had to visit a warehouse or supplier	5	83.3%
Had to return later	4	66.7%
Requested assistance from another technician	4	66.7%

Rescheduled the appointment	3	50.0%
Delayed the job	2	33.3%
Could not complete the work	2	33.3%

Operational impact:

Every missing materials incident creates a chain reaction. A technician who must visit a warehouse delays all remaining jobs for the day. A rescheduled appointment means a customer who waited all day must wait again. Better inventory visibility before departure would prevent most of these outcomes.

Top Daily Challenges

Technicians selected all challenges they experience regularly during their workday **(multiple choice)**.

Daily Challenge	Responses	% of Total
Inventory shortages	4	50.0%
Traffic	3	37.5%
Delays	3	37.5%
Customer not available	3	37.5%
Route changes	2	25.0%
Incomplete job information	2	25.0%
Communication issues	2	25.0%

How Often Do Technicians Arrive Without Enough Information?

Technicians were asked how often they arrive at a job without enough information to diagnose or complete the work efficiently. Note: 7 of 8 respondents answered this question.

Frequency	Responses	% of Respondents
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Rarely	4	57.1%
Never	2	28.6%
Sometimes	1	14.3%

Key finding:

85.7% of technicians rarely or never arrive without enough information to do the job. However, the 14.3% who sometimes arrive unprepared, combined with the 75% who have had missing materials, shows that information and inventory gaps are separate problems requiring separate solutions.

Top Operational Inefficiencies

Technicians identified the factors that most contribute to delays, repeat visits, and inefficiencies (multiple choice).

Inefficiency	Responses	% of Total
Need extra materials or inventory	6	75.0%
Incomplete problem descriptions from customers	4	50.0%
Customer interruptions while performing work	3	37.5%
Customer not home	3	37.5%
Need extra tools or equipment	3	37.5%
Service history notes missing	2	25.0%
Missing documentation	2	25.0%

Pattern:

The top two inefficiencies, missing materials at 75% and incomplete problem descriptions at 50%, are both information problems. Technicians are arriving at jobs without the material and contextual information they need. This is a system design failure, not a technician performance issue.

Overall Satisfaction with Current Tools and Systems

Technicians rated their overall satisfaction with the tools and systems they currently use.

Rating	Responses	% of Total
5, Very satisfied	1	12.5%
4, Satisfied	4	50.0%
3, Neutral	3	37.5%
2, Dissatisfied	0	0%
1, Very dissatisfied	0	0%

Overall average: 3.75/5

Technicians are not deeply dissatisfied with their current tools, but they are not satisfied either. The neutral-to-satisfied range signals that they have adapted to imperfect systems. The open-ended responses reveal what is missing, not the ratings.

Interest in an App for Customer Updates and Job Reporting

Technicians were asked whether they would use an app that automatically updates customers and simplifies reporting.

Response	Responses	% of Total
Yes, interested	5	62.5%
No	3	37.5%

Design consideration:

62.5% said yes. The 37.5% who said no may reflect concerns about cost (one respondent mentioned software cost), complexity, or skepticism about adoption. Any solution must be simple, fast, and low-friction to gain buy-in from skeptical technicians.

What Would Most Improve Daily Workflow?

Technicians selected all improvements that would most benefit their daily work (**multiple choice**).

Workflow Improvement	Responses	% of Total
Automated customer updates	6	75.0%
Better inventory tracking	5	62.5%
Troubleshooting steps from customer before arrival	5	62.5%
Better communication with dispatch	4	50.0%
Better routing and navigation	4	50.0%
Easier documentation and reporting	4	50.0%
Mobile access to all job information	4	50.0%
Better job information before arrival	4	50.0%
Detailed description of the issue from the customer	4	50.0%
Real-time schedule updates	3	37.5%
More accurate appointment scheduling	2	25.0%

Design priority order:

Technicians most want: (1) Automated customer updates, 75%, (2) Better inventory tracking, 62.5%, (3) Troubleshooting steps from customer, 62.5%, (4) Five items tied at 50% including easier documentation, better job info before arrival, and mobile access to job information.

What Task Takes More Time Than It Should?

Open-ended responses revealed the daily tasks technicians find most inefficient.

"Customer service"

"Setting up in the morning"

"Driving"

"Prepping material"

"Responding to all emails"

"The details"

"Waiting for others approval"

Pattern across time wasters:

Morning setup, material prep, driving, and administrative tasks consume time before a single job is started. Once on site, customer interruptions, email, and waiting for approvals slow down execution. These are all friction points a connected ecosystem could reduce.

Research Themes

Four recurring themes emerged across all technician survey responses. These themes define the operational problem space and inform the design of the technician-facing solution.

Theme 1: The Information Gap Before Arrival

Technicians frequently arrive at jobs without complete information. Incomplete customer problem descriptions force technicians to diagnose issues they were not prepared for, leading to missing materials and extended job times.

- 50% cited incomplete problem descriptions as a top inefficiency
- 50% want detailed issue descriptions from customers before arrival
- 62.5% want troubleshooting steps already attempted by the customer
- 50% want better job information before arrival

Theme 2: The Materials Problem

Missing materials are the single most disruptive operational failure in this dataset. The chain reaction of one missing part ripples across an entire day of appointments.

- 75% of technicians have arrived without necessary materials, parts, or equipment
- 83.3% of those affected had to visit a warehouse or supplier

- 66.7% of those affected had to return later
- 33.3% of those affected could not complete the work at all
- 62.5% want better inventory tracking as a workflow improvement

Theme 3: The Documentation Burden

Paper forms, end-of-shift reporting, and manual communication to dispatchers create an administrative burden that reduces accuracy and takes time away from productive service work.

- 87.5% still use paper forms as their primary documentation method
- 37.5% complete documentation at end of shift or next day, relying on memory
- 50% want easier documentation and reporting
- 50% want mobile access to all job information
- Documentation is identified as an area needing improvement by 25% of respondents

Theme 4: The Customer Communication Burden

Technicians are absorbing customer communication responsibilities that should be handled by automated systems. Manual customer updates interrupt active work and are inconsistent by nature.

- 75% of technicians are personally responsible for customer updates
- 75% are contacted by customers sometimes, frequently, or multiple times per day
- 75% of technicians are asked by customers about service details
- 50% of technicians are asked by customers about arrival time
- 75% of technicians want automated customer updates

What the themes tell us:

Every theme traces back to a single root cause: information is fragmented. Technicians do not have the job information they need before arrival. Dispatch does not have real-time visibility into job status. Customers do not receive automatic updates. A connected ecosystem that shares information across all three stakeholders would address every theme simultaneously.

Field Technician Persona

The following persona was developed from the technician survey data combined with industry articles. He represents the dominant operational experience pattern across respondents.

FIELD FELIX

Field Technician , 8 to 15+ Years Experience , Multiple Industries

"Give me the right info before I arrive and I can fix anything."

At a Glance

Experience 8 to 15+ years	Daily Visits 1 to 10+ per day	Doc Method Paper forms, 87.5%	Satisfaction 3.75 / 5 average
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Who He Is

Felix is an experienced field technician managing multiple jobs per day across residential and commercial locations. He arrives at jobs ready to work but is frequently held back by incomplete job information, missing materials, and administrative burden. He has adapted to imperfect systems over years of experience, but that adaptation costs time and efficiency every single day. He wants to focus on the work, not on chasing information, updating customers manually, or filling out paperwork after an exhausting shift.

Goals

- Arrive at every job with complete information and the right materials
- Spend less time on paperwork and administrative tasks
- Stay informed of schedule changes as they happen
- Keep customers updated without having to stop and call or text manually
- Complete more jobs per day with fewer interruptions and callbacks

Pain Points

Missing Materials

75% of respondents have arrived at a job without the necessary materials. Every missing part means a warehouse trip, a return visit, or an incomplete job. This is the most disruptive single failure point in the field technician workflow.

Incomplete Job Information Before Arrival

50% cited incomplete problem descriptions as a top inefficiency. Without knowing what to expect, technicians cannot prepare, cannot bring the right materials, and cannot diagnose efficiently. The job starts behind before it begins.

Manual Customer Updates

75% of technicians are personally responsible for updating customers about delays and arrival times. This means stopping active work to make calls or send texts, often multiple times per day.

End-of-Shift Reporting

37.5% complete documentation at the end of a long shift or the next day. Reports written hours after the work is done rely on memory. This is where inaccuracies enter the system, affecting billing, inventory tracking, and service history.

What He Needs

Functional Needs	Emotional Needs
• Complete job info before arrival • Inventory and materials visibility • Automated customer updates • Mobile reporting at the job site • Real-time schedule and route updates	• Confidence that he has what he needs • Reduced interruptions during active work • Recognition that his time has value • Trust in the systems he works with

What Makes Him Satisfied

- Arrives at a job with complete information and all necessary materials
- Documentation is quick and done on-site while details are fresh
- Customers are automatically updated without manual effort from him
- Schedule changes are communicated in real time before they create problems

What Makes Him Frustrated

- Arriving at a job to discover a part is missing, 75% have experienced this
- Incomplete problem descriptions that make diagnosis take longer than necessary
- Having to stop mid-job to call or text a customer with an update
- Writing reports at the end of a long shift from memory
- Being contacted by customers directly because no information system notified them

Top Workflow Improvements by Priority

#	Improvement	Survey Evidence
1	Automated customer updates	75% selected this as a top workflow improvement
2	Better inventory tracking	62.5% selected this as a top workflow improvement
3	Troubleshooting steps from customer	62.5% want this before arrival
4	Easier documentation and reporting	50% selected this as a top workflow improvement
5	Better job information before arrival	50% selected this as a top workflow improvement

Opportunity Statement

Field technicians like Felix need to arrive at every job prepared. The opportunity is to connect inventory visibility, complete job information, and automated communication into one mobile workflow that reduces friction before, during, and after every service visit.

Persona Snapshot

Name: Field Felix **Archetype:** Field Technician

"Give me the right info before I arrive and I can fix anything."

Top Priorities

- Automated customer updates
- Better inventory tracking
- Complete job information before arrival
- Easier on-site documentation
- Real-time schedule updates

Field Felix is directly supported by 8 survey responses combined with field service industry research. He represents the dominant operational pattern across technician respondents.