Technician Routing Checklist

Printable PDF • Updated January 17, 2026 • Field service dispatch + technician scheduling

Use this checklist to build technician routes that respect **appointment windows**, **service time**, **travel time**, and **working hours**. It is designed for daily dispatch and same-day changes.

Quick start
1) Confirm jobs + appointment windows • 2) Add realistic service time • 3) Set technician start locations + working hours
4) Optimize, then review feasibility (windows, overtime) • 5) Dispatch and track completion

1) Before you optimize (data quality)

- [ ] Job list is complete (today + carryovers), with correct addresses or GPS coordinates
- [ ] Every job has a priority (urgent, standard, flexible) and clear notes/access instructions
- [ ] Appointment windows are set (or marked flexible if you can arrive anytime)
- [ ] Estimated service time is set per job (use averages by job type)
- [ ] Customer contact is available for hard-to-find locations or gated sites

Tip: If schedules look great on a map but fail in reality, missing service time is usually the cause.

2) Technician setup (resources + constraints)

- [ ] Technician start location is correct (depot, home, or first job)
- [ ] Working hours are correct (start, end, breaks/lunch)
- [ ] Skill / territory rules are applied (who can do which job, which zones)
- [ ] Capacity constraints are set if relevant (parts/tools/weight/volume)
- [ ] Return-to-depot requirement is set if needed (end location)

3) Optimize and review feasibility

After you optimize, do a fast feasibility review before dispatching. Look for routes that are **possible** (windows met, day fits) and **practical** (minimal backtracking, balanced workload).

Check	What to look for	Fix if failing
Time windows	Any job outside its allowed window	Widen window, move job to another tech, or add a tech
Working hours	Route ends after shift / excessive overtime	Rebalance workload, add tech, reduce jobs, or extend hours
Service time	ETAs drift later and later during the day	Increase service time assumptions; add buffers
Travel time	Too much cross-town driving or route crossings	Use territories/zones, re-optimize, or lock key jobs

Dispatch-ready rule: If a route has multiple tight windows, add buffer time or split jobs across technicians.

4) Dispatch and day-of execution

- [ ] Routes are published with stop order + scheduled ETAs
- [ ] Technicians have navigation access (app or preferred maps) and know how to start the route
- [ ] Customer notifications are scheduled if you send ETAs or arrival windows
- [ ] Exception workflow is defined (late job, added job, cancellation, no access, parts delay)
- [ ] Re-optimization policy is clear (when to re-optimize vs keep routes stable)
- [ ] Technicians can mark job status (en route, started, completed, failed) with timestamps

5) End-of-day review (improve tomorrow’s plan)

- [ ] Compare planned vs actual arrival times; note jobs with large ETA errors
- [ ] Update service time averages by job type (use real completion data)
- [ ] Track on-time rate (% of jobs within appointment window) and reasons for misses
- [ ] Track utilization (drive time vs service time) per technician
- [ ] Update addresses/notes that caused delays (gates, hard-to-find locations)

Optional worksheets (print and fill)

Use these sheets to capture exceptions and improve routing assumptions over time.

A) Exception log (same-day changes)

Time	Job	Issue	Resolution
____	_____	_____	_____
____	_____	_____	_____
____	_____	_____	_____
____	_____	_____	_____
____	_____	_____	_____
____	_____	_____	_____
____	_____	_____	_____
____	_____	_____	_____

B) Simple ROI worksheet

Metric	Before	After	Value
Miles per day	____	____	(Before - After) x cost per mile
Drive hours per day	____	____	(Before - After) x labor $/hour
Overtime hours/week	____	____	(Before - After) x overtime $/hour
On-time rate	____%	____%	Higher on-time = fewer reschedules/callbacks

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