

EXECUTIVE SUMMARY

Sample Workflow Blueprint #001

Mobile Service Request & Dispatch

A real operational workflow, sanitized to demonstrate the Joonvia Workflow Blueprint approach.

THE PROCESS PROBLEM

Mobile requests arrived through phone calls and email without a consistent intake standard. Staff reconstructed missing details, selected a technician and manually emailed the job. Dispatch and customer records were inconsistently maintained.

THE REDESIGNED FOUNDATION

Structured Google Form intake, VIN decoding, a centralized Google Sheets dispatch workflow and automated new-request emails create a more consistent starting point for service coordination.

PROOF IN PRACTICE

The implemented system is used daily. Salespeople adopted the form to submit mobile-service requests.

Before you automate the work, fix the process.

This sample explains the before-state, the implemented foundation and recommended next steps. Outcomes are qualitative and based on the supplied operating account; no measured savings or performance claims are presented.

CURRENT-STATE WORKFLOW

How requests moved before the redesign

Multiple entry channels placed the burden of completeness on managers and foremen.

01 Customer or salesperson requests service

Main mobile phone, direct manager/foreman call, or email.

**02 Manager or foreman receives the request**

Phone/email, location, VIN or technical details may be missing.

**03 Staff call or text for missing information**

Reconstruct the request before it can be dispatched.

**04 Technician is selected and emailed manually**

Repair type, engine or fuel system may remain unqualified.

**05 Technician travels to the service location**

Technicians reported missing information on arrival.

SEPARATE MANUAL UPDATES

Dispatch board and customer contact records depended on additional manual entry and were inconsistently updated.

FAILURE POINTS / OPERATIONAL IMPACT

Where the process lost information

The root issue was the process design: information was not captured and handed off consistently.

01 Unstructured intake

Missing contact details, physical address, VIN and job information triggered calls or texts to fill gaps.

02 Incomplete job qualification

Repair type, engine and fuel-system details were not reliably established before assignment. The wrong technician could be sent.

03 Disconnected operational records

Calls and emails did not consistently carry through to the dispatch board or customer contact records.

04 Manual technician handoff

The assigned technician depended on a manually composed email. Field staff reported incomplete information on arrival.

05 Assignment depends on individual judgment

Without a documented capability check, dispatch relies on staff knowledge. A capability matrix is a recommended next step.

Operational implication: repeated follow-up, unreliable handoffs and avoidable dispatch uncertainty. The size of these effects has not been measured.

FUTURE-STATE WORKFLOW

One structured path from request to dispatch

Implemented foundation below; review gates and handoff controls describe the recommended operating standard.

01 Structured Google Form intake

Capture customer, contact, location, VIN and complaint.

**02 VIN-supported vehicle enrichment**

Decode available vehicle data; flag missing or uncertain details.

**03 Central Google Sheets request record**

Standardized information supports the dispatch workflow.

**04 Automated new-request email**

Notify the relevant personnel that a request has arrived.

**05 Dispatcher reviews and qualifies the job**

Confirm repair type, engine/fuel system and technician capability.

**06 Assign technician and confirm the handoff**

Provide job details before travel; retain human assignment control.

EXCEPTION PATH

Unknown VIN data or incomplete job details return to the dispatcher for clarification before assignment. VIN data supports qualification; it does not establish repair suitability by itself.

AUTOMATION & TECHNOLOGY PLAN

Automate a defined handoff

Use simple tools to support the workflow. Keep technician suitability and unresolved exceptions under human review.

IMPLEMENTED FOUNDATION

Google Forms	Structured intake and standardized job information.
VIN decoder	Vehicle enrichment to support review; verify uncertain details.
Google Sheets	Centralized request and dispatch workflow.
Automated email	New-request notification to relevant personnel.

BEFORE TO AFTER

BEFORE

- Scattered calls and emails
- Missing or inconsistent job details
- Manual new-request notification
- Fragmented dispatch information
- Informal submission by salespeople

AFTER

- > Structured request intake
- > Standardized information fields
- > Automated new-request emails
- > Centralized Sheets workflow
- > Adopted form used in daily operations

Recommended controls: required fields, dispatcher review, notification failure checks and consistent technician job packets. These controls are design recommendations, not verified implementation claims.

NEXT-PHASE OPPORTUNITIES / ROADMAP

Prove the workflow. Then extend the system.

Recommendations below are future opportunities; they are not represented as completed features.

01 / Stabilize the foundation

Owner: process lead + dispatcher

Audit required fields, VIN exceptions and email delivery. Confirm the minimum job packet and who updates each record.

Gate: a complete request and a failed-notification case can both be handled.

02 / Improve dispatch reliability

Owner: dispatcher + implementation lead

Build a technician capability matrix. Add a dispatch view fed from request data and a governed customer master record.

Gate: capability review and contact updates work without duplicate entry.

03 / Track service progress

Owner: service lead + implementation lead

Define Assigned, En Route, On Site, Waiting and Complete. Pilot customer notifications and a status dashboard.

Gate: status ownership and customer-message triggers are verified.

04 / Evaluate a dedicated application

Owner: process lead

Consider a purpose-built interface only after stable adoption, clear permissions and proven workflow requirements.

Gate: the existing tools no longer meet documented operational needs.

YOUR NEXT STEP

Implement internally, request a separate fixed-price Joonvia build proposal, or discuss implementation plus support. The \$249 Workflow Blueprint covers design and recommendations; building and ongoing support are separate.