GUIDE

APRIL 6, 2026

THE 30DAY TECHNICIAN APP ADOPTION PLAN (ONE NONNEGOTIABLE, ONE SCOREBOARD, ONE RIDEALONG)

A practical, one-page-ready month plan to get field techs consistently using your mobile app: one small non-negotiable workflow, a daily scoreboard, ride-along coaching, friction fixes, and a fair consequence ladder. Includes quick notes for ServiceTitan and Housecall Pro.

FROM EPISODE

GET YOUR TECHS USING THE APP: THE 30-DAY ROLLOUT THAT ACTUALLY STICKS

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- Week 4: The consequence ladder (fair, published, and narrow)
- Scoreboard cadence, targets, and what “good” looks like
- Tiny tool-variant notes (ServiceTitan and Housecall Pro)
- Post this card: The 3-step non-negotiable + the daily scoreboard

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A field-tested, friction-light rollout to get your technicians using the mobile app consistently in 30 days. Built for 3–15 tech residential shops that already pay for an FSM app but see spotty field usage. Aim to run this before your peak season (HVAC owners: April 7–May 7 is ideal) so habits are locked in when volume surges. The plan centers on one small non-negotiable bundle, a simple daily scoreboard, ride-along coaching, and a fair consequence ladder.

WEEK 0 (SETUP, 45 MINUTES): ONE BUNDLE, ONE SCOREBOARD, ONE OWNER

Do these once to set the lane for the month.

- Assign an Adoption Owner. One person (often the service manager or lead dispatcher) is on point for the 30-day window and the scoreboard.
- Publish the non-negotiable bundle. What "counts" as a compliant job in Week 1:
    1. Clock in on the job in the app and clock out when done.
    2. Take at least two photos per job (diagnosis/evidence + completion).
    3. Change job status at closeout (e.g., Working → Done/Complete in the app).
- Set the daily scoreboard. One line per tech, updated by 4:30 pm daily.

    Compliance formula:

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    Daily compliance % (per tech) = Jobs with all 3 steps done in the app ÷ Total jobs assigned × 100
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    Example: 6 assigned, 5 fully done in-app → 83%.
- Decide your display. Whiteboard in the shop, a pinned message in Slack/Teams, or a simple sheet your dispatcher updates. Post it where techs see it.
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Announce the why and the window. "We're running a 30-day push before peak hits. Three steps, one scoreboard, ride-along coaching. This is about faster estimates, fewer callbacks, and less back-and-forth with dispatch."

- Tool prep (5 minutes): confirm everyone is logged in, has latest app version, and can open a test job.

WEEK 1: RUN THE NONNEGOTIABLE + DAILY SCOREBOARD

Your entire focus this week is the 3-step bundle and the scoreboard. Do not add features.

- Stand-up script (Mon 7:30 am)
  - "This week only three things matter on every job: clock in/out on the job, two photos, status change to complete. That's it. We'll post the percent by tech daily."
- Dispatcher routine (Mon–Fri)
  - After lunch: spot-check 2 jobs per tech for the 3 steps.
  - 4:00 pm: pull the day's job list and tally each tech's compliant jobs.
  - 4:30 pm: post the scoreboard. Example line: "Luis — 5/6 = 83%".
  - 4:35 pm: send 1:1 nudges only for misses ("Missing 2nd photo on Job 1842; please add now").
- What counts / what doesn't
  - Counts: steps completed inside the mobile app on the right job.
  - Doesn't: photos texted to dispatch, paper timecards, status updated later in the office.

- Target for Week 1: 50–60% average compliance across the team by Friday.
- Sample message to techs
  - "Three steps every job: clock in/out on the job, two photos, status to complete. We're posting the percent daily. If you miss a step, fix it before you leave the driveway."

Tiny tool notes

- ServiceTitan: Use Technician scorecards or a simple custom report to see per-tech closeouts and photo counts. You can also eyeball the Job Audit Trail for status changes.
- Housecall Pro: Photos attach from the job screen; background uploads continue if service drops. If you don't have a built-in view, dispatcher can tally from the job list and attachments.

WEEK 2: RIDEALONG COACHING (HIGHROI DAY)

Ride-alongs surface real friction and fix it in the truck, not in a meeting. Block one day and rotate through your lowest-compliance techs first.

20-minute ride-along checklist (pick one job per tech)

- Pre-arrival (2 min): Ask, "Show me how you open the job and clock in." Note taps.
- On site (5 min): Watch them take the first photo. If it takes more than 10 seconds to find camera/upload, flag it for Week 3 fixes.
- Closeout (6 min): Observe status change and second photo. Confirm they can finish without cell service (simulate Airplane Mode if safe).
- Pricebook speed (4 min): If they quote on site, have them star 5–10 most used items/services as Favorites for faster access.
- Debrief (3 min): Ask, "What slowed you down? One thing we can fix?" Log it.

How to coach in the truck (sample language)

- "I'm not here to grade your HVAC skills — only these three taps. Let's shave keystrokes so this takes under 60 seconds at closeout."
- "If service drops, keep rolling; the app will sync when you're back. Don't let no-bars stall you."

Expected move by Friday: lift team average to ~70%+; each coached tech gains 10–20 points.

WEEK 3: REMOVE FRICTION (OFFLINE, BACKGROUND UPLOADS, FAVORITES)

Now remove the excuses you heard in Week 2. Do this as a 45-minute working session.

Working session agenda (45 minutes)

1. Offline + background uploads (10 min)
    - ServiceTitan: Confirm mobile offline is enabled; practice a closeout in low/no service and watch it sync later.
    - Housecall Pro: Show that photo/video uploads continue in the background and resume after signal returns.
    - Team test: Everyone closes one test job in Airplane Mode; confirm nothing breaks.
2. Pricebook favorites (15 min)
    - Have each tech star 10–15 most used items/services per trade so quotes and job tasks are 2–3 taps, not a scroll hunt.
    - Create a "Starter Favorites" pack by trade and share it.
3. Trim forms + add one nudge (15 min)

- Remove noncritical fields from job forms; keep only what dispatch or QA actually uses this month.
- Add one push reminder at job close (“Missing 2nd photo or status — complete before leaving”).

4. Re-state the bundle (5 min)
    - "Same three steps. Now it’s faster and works without signal."

Target for Week 3: hit 80–85% average compliance by Friday.

Tip: If a tech is still under 50% by Wednesday, schedule a second, tighter ride-along (repeat the 20-minute checklist).

WEEK 4: THE CONSEQUENCE LADDER (FAIR, PUBLISHED, AND NARROW)

This only applies to the three non-negotiables. Keep it fair, consistent, and documented. Reset the board Monday, apply consequences Friday.

- Level 0 — Reminder (first miss pattern)
    - Private note: “Last 3 days, 4/10 jobs missed a required step. Please correct today.”
- Level 1 — Documented warning (if under 60% for the week after a reminder)
    - Script: “We agreed on three steps per job. You finished the week at [X]%. This is a documented warning. Let’s ride together Monday and remove whatever is in the way.”
- Level 2 — Loss of schedule preference (if still under 70% the following week)
    - Script: “Because the basics aren’t sticking, we’re removing schedule preferences and assigning you to standard routes until you’re at 80%+ for 2 straight weeks.”

- Level 3 — Assignment change (repeat misses of the basics)
    - Script: “We can’t keep sending you to same-day diagnostic routes if the app basics aren’t done. Until the metrics hold at 80%+ for 2 weeks, we’ll assign install/assists where closeout can be coached.”

Owner notes

- Tie every step to the bundle only — not to sales per ticket or upsells.
- Document dates, percentages, and ride-along coaching provided.
- If you’re in a state with specific employment rules or a CBA, align language with your HR counsel.

Target for Week 4: reach and hold 90%+ team average; no tech under 70%.

SCOREBOARD CADENCE, TARGETS, AND WHAT “GOOD” LOOKS LIKE

Use this rhythm to keep adoption high without meetings bloat.

Daily (10 minutes)

- Dispatcher updates the scoreboard by 4:30 pm and posts it.
- Adoption Owner DMs only the misses with exact instructions (job # and missing step).

Weekly (20 minutes, Mondays)

- Review last week’s averages and lowest two techs.
- Book one ride-along if any tech finished <70%.

- Confirm friction fixes are sticking (favorites used, offline success, nudge firing).

Color coding and targets

- Green ≥ 90% (gold standard)
- Yellow 70–89% (coach and watch)
- Red < 70% (ride-along + Level 1 warning if repeat)

Suggested ramp

- Week 1: 50–60%
- Week 2: 70%+
- Week 3: 80–85%
- Week 4: 90%+

Post-30 days: keep the scoreboard weekly for a quarter, then monthly. Re-run a 2-week mini push before your next peak.

TINY TOOLVARIANT NOTES (SERVICETITAN AND HOUSECALL PRO)

Short pointers you can hand to dispatch or your lead tech.

ServiceTitan (ST)

- Offline: Field mobile supports offline entry with later sync — practice it so techs trust it.
- Scoreboard: Use technician scorecards or a simple jobs-closed report to spot who’s missing photos/status.
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Photos: Require two per job via closeout checklist; coach from the Job Audit Trail when steps are skipped.

Housecall Pro (HCP)

- Background uploads: Photos/videos keep uploading in the background and resume after signal returns — tell techs not to wait on the spinner.
- Favorites: Star frequently used services so estimating and tasking take fewer taps.
- Scoreboard: If you don't have a per-tech view, dispatcher tallies from the job list + attachments; post the fraction and percent daily.

Reminder: Keep the bundle identical across tools — clock in/out on the job, two photos, status change to complete.

POST THIS CARD: THE 3STEP NONNEGOTIABLE + THE DAILY SCOREBOARD

Print or post this where techs clock in.

- Three on every job:
  1. Clock in on the job, clock out when done.
  2. Two photos (evidence + completion).
  3. Status to complete before leaving.
- Your scoreboard line reads: "[YOUR NAME] — [COMPLIANT JOBS]/[TOTAL] = [PERCENT]%" by 4:30 pm.
- If you miss a step, fix it before you leave the driveway.

One question to ask this week

- “If I pulled yesterday’s board, what percent of jobs were fully completed in the app for each tech?”