

Estimate the operational impact D365 Field Service could have on your organisation.

This scorecard helps you understand how much impact Dynamics 365 Field Service could realistically deliver for your organisation based on your current challenges, scale and complexity.

How to use

For each question, select the statement that best reflects your current operation.

- Score 1-4 for each question - use the checkboxes
- Add up your total score across all sections
- Use the scoring guide at the end to interpret your Field Service Impact Potential (as defined at the end of this scorecard)

Scheduling and resource utilisation

Q1. How are field jobs currently scheduled and assigned?

- 1 Manually, based on availability and experience
- 2 Using spreadsheets or basic calendar tools
- 3 Via a system, but scheduling remains largely manual
- 4 Automatically, matching skills, location, priority and availability

Q2. How much inefficiency exists in your current scheduling process?

- 1 Frequent rescheduling, delays and reactive changes
- 2 Some inefficiency, especially during peak periods
- 3 Mostly efficient, with occasional bottlenecks
- 4 Highly efficient with dynamic optimisation

First-time fix and repeat visits

Q3. How often do engineers need to return to complete a job?

- 1 Repeat visits are common
- 2 Manageable, but still frequent
- 3 Occasionally required
- 4 Rare - first-time fix is consistently achieved

Q4. How well prepared are engineers before arriving on site?

- 1 Limited context and information
- 2 Partial job and asset history available
- 3 Most information accessible, but fragmented
- 4 Full job, asset and knowledge context available on mobile

Asset, parts and inventory control

Q5. How confident are you in your asset and equipment data?

- 1 Low - asset data is incomplete or unreliable
- 2 Basic register exists but is rarely updated
- 3 Mostly accurate, limited insight into asset performance
- 4 Full asset history with proactive maintenance insight

Q6. How effectively are parts and inventory managed for field jobs?

- 1 Engineers often arrive without the right parts
- 2 Manual checks reduce errors but delay dispatch
- 3 Inventory tracked, not fully connected to jobs
- 4 Real-time stock visibility linked to work orders and vans

Customer experience and communication

Q7. How clear and proactive is customer communication around service visits?

- 1 Customers chase for updates
- 2 Basic confirmations issued by admin teams
- 3 Automated notifications, limited visibility
- 4 Live ETAs, self-service and real-time updates

Q8. How well do you capture and use customer feedback?

- 1 We don't measure it consistently
- 2 Occasional surveys with limited follow-up
- 3 Feedback captured but rarely linked to performance
- 4 Feedback automatically linked to jobs and technicians

Visibility, reporting and decision-making

Q9. How confident are you in your service performance data (SLAs, utilisation, FTFR)?

- 1 Limited visibility, manual reporting
- 2 Historic reporting with delays
- 3 Regular dashboards, limited insight
- 4 Real-time visibility with actionable insights

Q10. How proactive is your operation today?

- 1 Mostly reactive
- 2 Some planning, limited foresight
- 3 Data informs improvement initiatives
- 4 Predictive insights guide operational decisions

Your impact score

Add up your scores across all 10 questions (maximum score: 40)

10-18: Limited immediate impact
Field operations are relatively simple today. D365 Field Service may be valuable in future as complexity increases.

19-27: Moderate impact
Clear efficiency and visibility gains available. A targeted, phased implementation would unlock meaningful improvement.

28-35: High impact
Strong case for D365 Field Service. Automation, optimisation and integration would drive significant operational value.

36-40: Transformational impact
Your operation is being constrained by current tools. D365 Field Service could fundamentally change performance, scale and customer experience.

What to do next

This scorecard highlights where impact exists - now you need to realise it. The real value of Dynamics 365 Field Service comes from getting the scope right, designing around real-world operations and phased implementation with strong adoption.



Get in touch to speak to one of our Dynamics 365 Field Service experts.