

Service Organization Self-Assessment

Score each item 0 (not in place), 1 (partly in place or inconsistent), or 2 (fully in place and current). Do it with your management team — each person scores independently, then compare. Where leadership disagrees, most is where to start.

#	Our service organization...	0	1	2
1	Knows its true cost per billable hour and reviews it at least annually	☐	☐	☐
2	Sets service rates based on our own costs, not on what competitors charge	☐	☐	☐
3	Operates from a separate profit-and-loss statement and an annual budget	☐	☐	☐
4	Measures efficiency rather than assuming it	☐	☐	☐
5	Recruits continuously, not only when a position becomes vacant	☐	☐	☐
6	Has written job descriptions and performance expectations for every role	☐	☐	☐
7	Invests in ongoing training with a defined annual plan	☐	☐	☐
8	Triages and pre-diagnoses calls before dispatch	☐	☐	☐
9	Tracks a small set of meaningful KPIs monthly and reviews them with each technician	☐	☐	☐
10	Manages parts inventory deliberately, balancing first call completion against carrying cost	☐	☐	☐
11	Runs a modern business management system our people can access remotely	☐	☐	☐
12	Reviews warranty rates and warranty mix annually and negotiates rather than accepts, with sales leadership in the conversation	☐	☐	☐
13	Presents a consistently professional image across uniforms, vehicles, and communication	☐	☐	☐
14	Actively manages our online presence, reviews, and customer satisfaction measurement	☐	☐	☐
15	Treats the customer experience as a deliberate design, not an accident	☐	☐	☐
TOTAL SCORE		_____ / 30		

Interpreting your score

Score	Where you stand	What to do next
25 – 30	High performing	The habits are in place and current. Work the individual items scored below 2 and hold the standard as the business grows.
18 – 24	Solid foundation	Fundamentals working but applied inconsistently. The gaps are usually measurement and documentation, not capability.
10 – 17	Significant gaps	Enough of the operation runs on the assumption that profitability is likely being lost without it showing clearly. Start with the financial items.
Below 10	Start with the fundamentals	Begin with cost per billable hour, written job descriptions, and a separate P&L. Everything else depends on those three.

The three items we will address first: 1. _____ 2. _____ 3. _____

Completed by: _____ Date: _____ Next review date: _____

The score matters less than the movement. Repeat annually, keep last year's sheet, and compare.