



Operational Diagnostic Methodology

Operator-led AI deployment, inside real workflows.

PREPARED FOR
**PE-backed field services
platforms**

PREPARED BY
OpsCore

DOCUMENT
Methodology v1.0

Operator-first

Recommendations grounded in how the work actually happens.

Build to ship

Working systems and integrations—
not abstract decks.

Measured impact

Throughput, cycle time, utilization,
friction removed.

Operational Diagnostic Methodology

What this is

OpsCore deploys AI inside the operational workflows of PE-backed field services platforms. The diagnostic is how we start. It is a fixed-fee, 30-day engagement at a single portfolio company that produces a written deliverable ranking AI-enabled interventions by ROI and giving you implementation cost, timeline, and risk on each.

The methodology is structured. The chokepoints we look for are not. What stays fixed: the four-phase sequence, the interview cadence, the analytical framework, the deliverable format. What changes: the metrics we examine, the chokepoints we prioritize, the interventions we recommend.

Who runs it

OpsCore is led by a field services operator who worked the ladder from technician to senior executive and ran a multi-hundred-million-dollar P&L. We have lived inside the systems we now diagnose from outside.

Michael Nauton, Principal

Twenty-plus years in field services. Most recently Senior Vice President at Velez, with P&L over \$600M across field deployment, supply chain, and project management for the largest US wireless construction services platform. Started as a technician. Now in portfolio operations at a lower-middle-market PE firm in addition to leading OpsCore.

Why the diagnostic exists

Every field services platform has chokepoints. They are rarely where the operating team thinks they are. The FSM rollout did not fix them. Under PE ownership they compound, because the value-creation thesis needs margin expansion the incumbent operating model cannot produce alone.

The diagnostic exists to identify, in 30 days, the two or three interventions that will produce the largest defensible margin lift over the next twelve months, with implementation costs and timelines that are credible to a value-creation committee.

Engagement economics. Fixed fee, \$50,000 to \$75,000 depending on scope and platform complexity. 30 calendar days, kickoff to deliverable. One portfolio company per engagement. Implementation work, if commissioned, is scoped separately.

The four-phase framework

Each week has a defined objective, a defined set of activities, and a defined output that feeds the next week. The cadence is enforced. Engagements that slip past 30 days create cost discipline problems on both sides and are not how this practice operates.

Phase	Week	Objective	Primary output
1	Week 1	Map what the platform measures, what systems produce it, and where the data flows or fails to.	Systems-and-data map (internal)
2	Week 2	Hear the operation from the people who run it. Surface friction the data does not.	Friction catalog, ranked
3	Week 3	Convert friction into ranked interventions, sized for impact, cost, time-to-value, and execution risk.	Intervention catalog with ROI estimates
4	Week 4	Produce the written deliverable. Live readout with portco and sponsor.	Diagnostic deliverable + readout

Phase 1 — Data & systems inventory

We pull 90 days of operational data. Completed work orders, cycle times, dispatch logs, billing aging, parts requests, ticket completion rates, technician productivity by individual and by branch. We map the systems that produced it — FSM, CRM, dispatch, billing/ERP, fleet, warehouse, compliance — and the integrations that connect or fail to connect them.

The most useful Week 1 finding is rarely the data itself. It is where the data does not exist. Fields routinely blank, manually overridden, or filled post-hoc are leading indicators of where the operational model is breaking. These drive the questions we ask in Week 2.

Phase 2 — Operator interviews

We interview the people who run the operation. Standard slate:

- Chief Operating Officer or Head of Operations
- VP or Director of Field Operations / Service Delivery
- Dispatch lead or routing manager
- Two to four branch managers across high- and low-performing branches
- Three to six technicians across tenure and performance bands (ride-alongs preferred where geography allows)
- Customer service or call center lead
- Billing or finance lead
- Compliance, safety, or quality lead where the vertical warrants it

The friction catalog comes out of these interviews. Frictions that show up in both data (Week 1) and interview (Week 2) are high-confidence chokepoints. Frictions that show up in only one get flagged for further investigation in Week 3.

Phase 3 — Chokepoint analysis & intervention design

Each candidate intervention is scored against five lenses. It only reaches the ranked deliverable if it clears the first three.

- **Margin impact.** Defensible annual margin lift, expressed as a dollar range tied to current revenue and cost structure.
- **Implementation feasibility.** Can this deploy in 90 to 180 days without disruption that exceeds the value created?
- **Tech maturity.** Is the underlying technology production-ready today, or does the engagement depend on capabilities still being built?
- **Adoption risk.** What is the realistic probability that field techs, dispatchers, or back-office staff actually use the intervention as designed?
- **Strategic fit.** Does the intervention align with the sponsor's value-creation thesis and the platform's growth plan, or create friction with either?

Phase 4 — Deliverable & readout

Week 4 produces the written deliverable and a live readout. The deliverable contains:

- Executive summary (one page, ranked interventions with headline numbers)
- Diagnostic findings (chokepoint analysis with supporting data and interview themes)
- Intervention recommendations (one section per intervention with impact, implementation roadmap, cost, timeline, risk)
- Sequencing recommendation (which intervention first, and what each subsequent one depends on)
- Appendix (data tables, systems map, interview themes)

The readout is 60 to 90 minutes, in person where geography allows, with the portco executive team and the sponsor's operating partner or value-creation lead. It is structured to surface objections in real time and to identify which interventions the platform is ready to commission immediately.

Intervention catalog

The catalog below organizes the AI-enabled interventions OpsCore deploys across five operational clusters. Recommendations in any given engagement are drawn from this catalog and customized to the platform's specific chokepoints, sub-vertical, and operating systems.

Field Operations

Voice-AI field data capture	Replaces tablet ticket entry. Technicians call in at job close; the agent extracts structured work-order data and routes downstream to FSM, warehouse, fleet, and compliance.
Dispatch & routing optimization	Density modeling, dynamic re-routing on day-of changes, constraint-aware scheduling for skills, equipment, and regulatory restrictions.
Predictive maintenance & asset state	Equipment failure prediction from sensor data and service history. Service-history-driven prioritization on maintenance routes.

Commercial Operations

Inbound call AI agents	Booking, after-hours, and overflow call handling. 24/7 lead capture, structured intake, integrated with dispatch and CRM.
Conversation intelligence	Analysis of tech-customer and CSR-customer interactions for sales coaching, objection handling, and upsell-conversion improvement.

Back Office

AP/AR automation	Invoice match against work orders and POs, exception handling, collections workflow automation. Compresses billing-cycle time and reduces write-offs.
Payroll automation	Variable-shift labor reconciliation (techs, dispatch, on-call) against time capture and pay rules. Reduces payroll exception cycles and compliance exposure on overtime and per-diem.
Close acceleration	Multi-entity consolidation, automated journal entries, exception flagging. Compresses monthly close from 12-15 days to 5-7.
Business insight reporting	Operator-facing dashboards and exception alerts across FSM, financial, and dispatch systems. Surfaces margin leakage, productivity outliers, and trend breaks before they hit the quarterly review.

Compliance, Quality & Risk

Regulatory documentation compliance	Automated capture and validation of regulatory fields at job close — hazardous waste manifests, NICET/NFPA reports, OSHA records, hazmat documentation. Routes to compliance system in parallel with billing.
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Workforce

Onboarding & ramp-time compression	AI-assisted onboarding workflows, skills assessment, training personalization, and structured field mentorship tracking. Compresses new-tech time-to-productivity by 30-50% in residential trades.
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How interventions get selected. The diagnostic identifies which two or three interventions from this catalog will produce the largest defensible margin lift at the platform being diagnosed. Catalog scope and recommended sequence are platform-specific outputs of the Week 3 and Week 4 analytical phases.

Engagement terms

Fee

Fixed fee, \$50,000 to \$75,000 per engagement, scoped at kickoff based on platform complexity, number of operating locations in scope, and depth of compliance or regulatory documentation review required. 50% on engagement start, 50% on deliverable acceptance. No success fees, no equity, no contingencies. Expenses billed at cost against a not-to-exceed cap agreed at kickoff.

Timeline

30 calendar days from kickoff to written deliverable and live readout. The cadence is enforced. If the platform cannot accommodate the interview slate within Week 2, the timeline shifts accordingly and is renegotiated.

What the client provides

- Read access to operational systems for the diagnostic period (FSM, dispatch, billing, ERP as applicable). Read-only is sufficient.
- Ninety days of operational data extracts in standard formats.
- Scheduling support for the interview slate. OpsCore conducts the interviews; the client identifies the right participants and books the time.
- An executive sponsor at the portco — typically the COO or CFO — who serves as engagement counterparty and authorizes the readout.

What OpsCore delivers

- A written diagnostic deliverable, 25 to 40 pages, structured as described above. PDF, formatted for executive distribution.
- A 60 to 90 minute live readout with the portco executive team and the sponsor's operating partner, in person where geography permits.
- Thirty days of follow-up access for clarification questions, at no additional cost.
- A clean handoff. The diagnostic is a standalone asset. If the platform elects to commission implementation work from OpsCore, scope and pricing are negotiated separately. If the platform elects another partner, the diagnostic supports that path without modification.

After the diagnostic

Implementation engagements, where commissioned, are scoped against the ranked interventions in the deliverable. Typical implementations run 90 to 180 days, fixed fee, \$100,000 to \$400,000 depending on intervention category and platform scale. OpsCore also offers ongoing portfolio operating advisory engagements to PE sponsors with multiple field services platforms; those are structured separately and discussed only after at least one portco engagement has produced results.

Contact

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