



AI WORKFORCE FOR FIELD SERVICES

# The recurring work your dispatch team **cannot get out from under.**

How a small workforce of AI roles takes on the recurring work around every service call, with your team still owning every decision that matters.

Metacto is a Managed AI partner for mid-market companies. We build AI roles around the recurring work your team already does, deploy them in your own environment, and give every role a named owner. Oversight varies by task type, and goes where the work needs it.

## FIELD SERVICE AI ROLES

● 4 REPRESENTATIVE

### Job Brief Builder AI Role

Brief JB-8842

### RTU-04 · Repeat Call

3 sources cited

awaiting dispatch

writes back · FSM

### Intake Qualifier AI Role

Qualifying no-cool call · Site 097

ACTIVE

### Service Note Clerk AI Role

Drafting 8 notes · 2 missing readings

2 MISSING

### Follow-up Owner AI Role

Tracking 5 promised estimates

DUE TODAY

## AT A GLANCE

6

representative  
AI roles mapped

45 min

AI Workforce Review

50

open-source  
workflow patterns



SEE IT RUN

# A repeat call prepared before the truck rolls, every line cited.

One role, one service call, one morning. Five tags mark the standards of safe execution: human oversight, verifiable proof, and automatic record write-back.

JOB BRIEF BUILDER AI ROLE • WO 8842

✓ every line cited

STEP 1: TRIGGER IDENTIFIED

Service call • FSM • 10/14 • Site 112: "Rooftop unit not cooling. Second call this month..."

✓ system of record

STEP 2: THE ROLE DRAFTS THE PROPOSAL

JOB BRIEF JB-8842 • RTU-04, SITE 112

Asset • RTU-04, 12.5-ton rooftop unit

History • compressor fault 9/28

Parts • contactor and capacitor

Visit readiness

Confirmed [Cited asset register]

Repeat [Cited WO 8710 note]

On truck [Cited van 14 stock]

Ready

✓ human in the loop

STEP 3: DISPATCHER'S EXPLICIT APPROVAL

Approve ✓

awaiting dispatch review

✓ ROI you can measure

✓ asks, never guesses

STEP 4: WRITE-BACK TO YOUR FSM

written back

Attached brief JB-8842 to WO 8842 and assigned the technician

EXCEPTION (IF TRIGGERED)

"Asset not identified? The call is held, and the missing question goes to the customer."

Inside the full blueprint

P.3

How proof gets built on your own work

P.5

21 AI roles, mapped to your service operation

P.9

Score your AI readiness: 5 factors, 25 points

>>>

METHOD

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02

# Measured on your workflow, inside your own review queue.

Every role starts in Launch & Prove: a baseline is set before the build, the role runs behind a human review queue with its own approval threshold, and results are measured against that baseline before anything scales.

## Baseline

Set before the build

Your numbers

## Approval rate

Tracked per role, per week

Measured

## Cycle time

Measured against the baseline

Measured



### REVIEW QUEUE · ILLUSTRATIVE

| ACTIVE REVIEW                                                                         | Runs this week                                     | Approval rate | Flagged for review |
|---------------------------------------------------------------------------------------|----------------------------------------------------|---------------|--------------------|
| → Repeat Calls (12)<br>Dispatch Log                                                   | WO 8842 · repeat no-cool call · RTU-04             |               | HIGH RISK          |
| AI ROLES                                                                              | WO 8810 · readings missing from note               |               | MEDIUM             |
| · Intake Qualifier<br>· Job Brief Builder<br>· Parts Resolver<br>· Service Note Clerk | Brief JB-8842 drafted · Awaiting dispatch approval |               | APPROVE            |

Every number an AI role produces links back to the record it came from, so your reviewers check the work instead of taking it on trust.

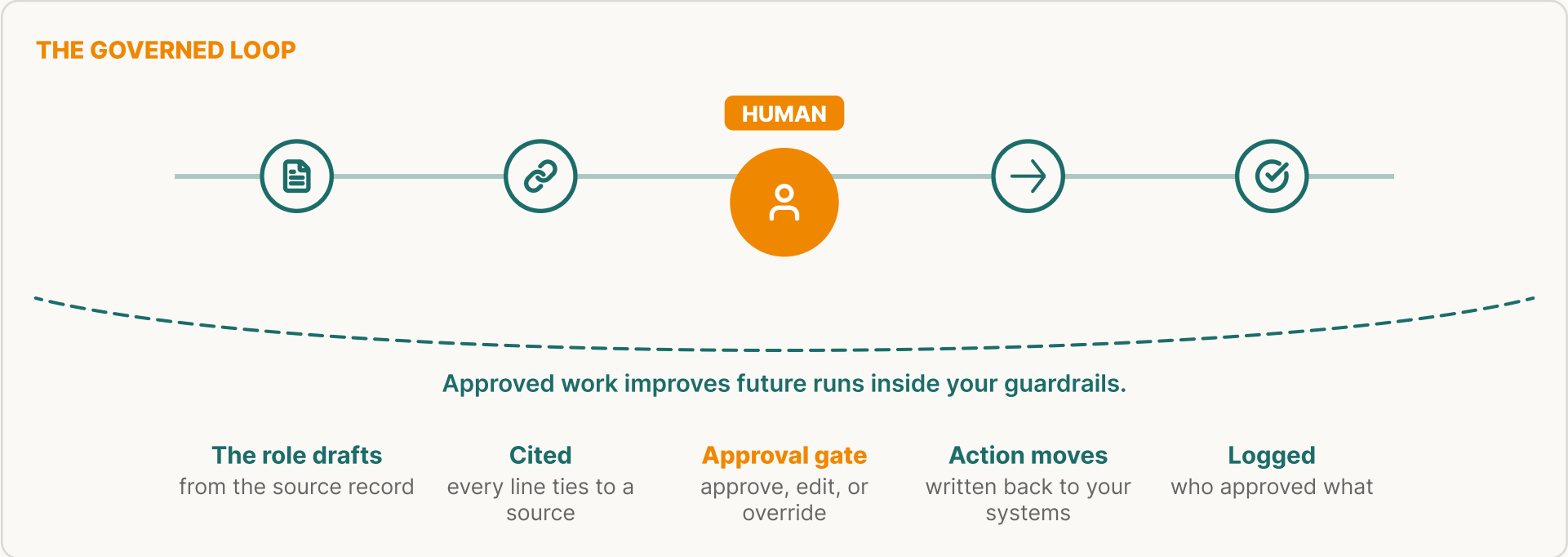
· HOW REVIEW WORKS

No results are claimed on this page, and the queue shown is illustrative. Your baseline, approval rate, and cycle time are measured on your own work during Launch & Prove.



# Your team decides. The role prepares the work.

AI roles earn trust while you use them, and approved work improves future runs. Every Metacto AI role runs the same governed loop, ensuring absolute visibility over every source, calculation, and system write-back.



One service call, fully accounted for

- 6:30 AM | Service call logged in your FSM
- 6:34 AM | AI role drafts brief JB-8842, citations attached
- 7:15 AM | **Dispatcher edits & approves (human decision)**
- 7:15 AM | Brief and assignment written back to your FSM
- 7:16 AM | Immutable audit entry logged to secure database

The controls, as your team sees them

- PERMISSIONS**  
Signed in: Dispatcher · North territory only
- CITATION**  
Compressor fault → WO 8710 service note · 9/28
- EXCEPTION**  
▲ Asset not confirmed · call held for customer question
- AUDIT**  
J. Smith changed the technician · approved 7:15 AM

EARNED AUTONOMY · THE THREE TIERS AND WHO SETS THEM

|                                       |                                   |                                      |
|---------------------------------------|-----------------------------------|--------------------------------------|
| Drafted · a person approves each item | Approved · acts within set limits | Autonomous · acts, team audits after |
| 1. Which tasks may act unattended?    | 2. What evidence moves a tier up? | 3. Who can move a tier back down?    |



# Your operating model, turned into a governed AI workforce.

Built around the work your service operation already does, and the people who already own it. Your dispatchers, technicians, and service managers keep every decision; specialized AI roles prepare the work, route it to your team, and carry approved records into the next workflow.

- **Service call**  
Site 112 · RTU-04 · second no-cool call this month
- **Job Brief Builder AI Role**  
drafts brief JB-8842 · history and parts cited → your dispatch queue
- **Dispatch review**  
approve, edit, or reassign · each action logged → approved
- **Service Note Clerk**  
drafts the visit record from photos and readings → technician approval
- **Follow-up Owner**  
logs the promised compressor estimate, due Friday → customer record

## Your team's queue

3 waiting

JB-8842 · RTU-04

AWAITING DISPATCH

WO 8810 · service note

CITED · READY

Estimate · Site 097

DUE TODAY

## MORE KINDS OF RECURRING WORK AN AI ROLE CAN COVER:

Intake Desk

Warranty Check

Agreement Renewal Tracker

PM Visit Scheduler

Parts Reorder Watch

Quote Follow-up

Permit Tracker

Callback Review

Invoice Packet Prep

Timesheet Review

Customer Update Desk

Van Stock Watch

Inspection Report Compiler

Subcontractor COI Tracker

Collections Follow-up

Roles are designed around your service operation's work, not selected from a menu. Every AI role protects one of four service pillars: First-time fix (visits), Utilization (technicians), Cash (billing), or Promise (customers).

**NEXT** How Metacto builds it inside your stack >



# AI roles work inside the systems you already run.

Designed around the software you already run: your team on top, governed intelligence in the middle, your systems of record at the base.

1

## Human Interface

your team

**Dispatch queue · service manager queue** · approve, edit, or override AI role output before any system write-back occurs.

DRAFTS STAGED FOR REVIEW ▲ / ▼ APPROVALS & EDITS COME BACK

2

## Intelligence

specialized AI roles

**AI roles draft & prepare** · grounded calculations based on your specific SOPs and cited record data.

AI ROLES RUN ON GOVERNED CONTEXT ▲ / ▼ APPROVED WORK COMPOUNDS THE CONTEXT

3

## Context

your operating knowledge

**Connected records** · the logic of your business, roles, permissions, and exception thresholds.

READS THE SOURCE RECORDS ▲ / ▼ WRITES APPROVED RESULTS BACK · AUDIT LOGGED

4

## Systems of Record

your software

**Field service management · CRM · accounting** · jobs, sites, assets, service history, parts, agreements, and invoices.

### TYPICAL SYSTEMS OF RECORD:

Field service management

CRM

Accounting

Asset registry

Parts &amp; inventory

Mobile tech app

Quoting

Service agreements

Telematics

Email &amp; phone

Document storage

Payments

### OPEN BY DEFAULT

50 open-source workflow patterns published through Vocation, readable before you buy. The platform is open source and runs in your own account.

NEXT

How Metacto builds it and keeps it improving >



# How Metacto builds it and keeps it improving.

Metacto maps, designs, builds, and integrates AI roles around the work your business already does, then keeps them accountable, measurable, and improving. Three stages, one accountable path.



01

## AI Workforce Review

Where recurring work is costing the most time and margin, and the first one or two roles mapped around it.

45 MINUTES



02

## Launch & Prove

We structure your context, build the first roles on your live systems, and prove them behind a human review queue.

SCOPED AT THE REVIEW



03

## Managed Operations

Review gates, quality and cost tracking, and monthly value reviews; approved work compounds into better runs.

ONGOING

**Standard path:** We start with one high-impact piece of work (e.g., job briefs or service note completion) to prove the review loop before scaling the workforce.

**Stop the service, keep the workforce.** The AI roles you deploy stay yours and keep running on their last deployed version. What ends is Metacto keeping them accountable, measured, and improving.

NEXT

[The value model: what funds the build >](#)



# Your number gets built before you commit budget.

| Repeat trip opportunity • your inputs           |           | Worked example                                  |               |
|-------------------------------------------------|-----------|-------------------------------------------------|---------------|
|                                                 |           | ILLUSTRATIVE                                    |               |
| Avoidable revisits<br>per year, all technicians | [ _____ ] | Avoidable revisits<br>regional, multi-location  | 600           |
| Avg cost per revisit<br>\$ per truck roll       | [ _____ ] | Avg cost per revisit<br>\$ per truck roll       | \$310         |
| Recoverable share<br>vs. your baseline          | [ _____ ] | Recoverable share<br>prevented by better prep   | 40%           |
| Office hours recovered<br>× loaded labor cost   | [ _____ ] | Office hours recovered<br>800 hrs × \$45 loaded | \$36,000      |
| Estimated annual opportunity:                   | \$ _____  | Your estimated annual<br>opportunity:           | ≈ \$110K / YR |



# Score your AI readiness.

|                               |                                                       |     |
|-------------------------------|-------------------------------------------------------|-----|
| <b>Business impact</b>        | trips, technician time, or promises move on every job | / 5 |
| <b>Workflow repeatability</b> | recurs on every job                                   | / 5 |
| <b>Source readiness</b>       | records exist in systems                              | / 5 |
| <b>Approval clarity</b>       | one owner who signs off                               | / 5 |
| <b>Implementation path</b>    | clean destination system                              | / 5 |

**TOTAL SCORE:** \_\_\_\_\_ / 25

**21-25: READY TO MAP**

Book an AI Workforce Review

**15-20: NEEDS DISCOVERY**

Worth mapping workflow logic

**< 15: PREPARE FIRST**

Line up digital records first

## Your Field Service AI Workforce Starts Here.

45 minutes. We look at where recurring work is costing the most time and margin, and map the first one or two roles around it. Nothing to prepare.

Book an AI Workforce Review