OMNI-VIEW

Data and Insights Checklist

A Practical Guide for Portable Operators Who Want Better Visibility, Cleaner Data, and Smarter Decisions

Introduction

Portable operators manage a lot at once: customers, assets, dispatch, routes, billing, inventory, service schedules, sales activity, team communication, and growth planning.

Somewhere along the way, spreadsheets become the fallback.

→ One spreadsheet tracks assets.
→ Another tracks customer requests.
→ Another tracks upcoming jobs.
→ Another tracks payments.
→ Another tracks sales opportunities.
→ Another “temporary” spreadsheet becomes permanent because it solves an immediate problem.

At first, it works, but as the business grows, cracks start to show.

→ Information lives in too many places.
→ Reports take too long to build.
→ Teams rely on memory instead of real-time visibility.
→ Leaders make decisions based on partial information.
→ Small issues become expensive problems because no one sees them soon enough.

Introduction (continued)

That is why better data matters.

Not more data.
Not more dashboards for the sake of dashboards.
Not more manual reporting.

→ Better data means your team can answer important business questions faster:

- Which assets are available right now?
- Which units are sitting idle?
- Which customers are overdue?
- Which routes are inefficient?
- Which jobs are at risk of being missed?
- Which sales opportunities need follow-up?
- Which service areas are most profitable?
- Where are we losing time, money, or visibility?

This checklist is designed to help you evaluate how well your business uses data today, and where better systems, cleaner processes, and stronger reporting could help you operate with more confidence.

Use it as a self-audit, leadership discussion guide, or planning tool for your next phase of growth.

01 Business Visibility

Before improving data, you need to understand what you can and cannot see today.

Many operators have information, but not always visibility.

Information may exist somewhere, but if it takes hours to find, verify, clean up, or explain, it is not truly useful in the moment.

Ask Yourself:

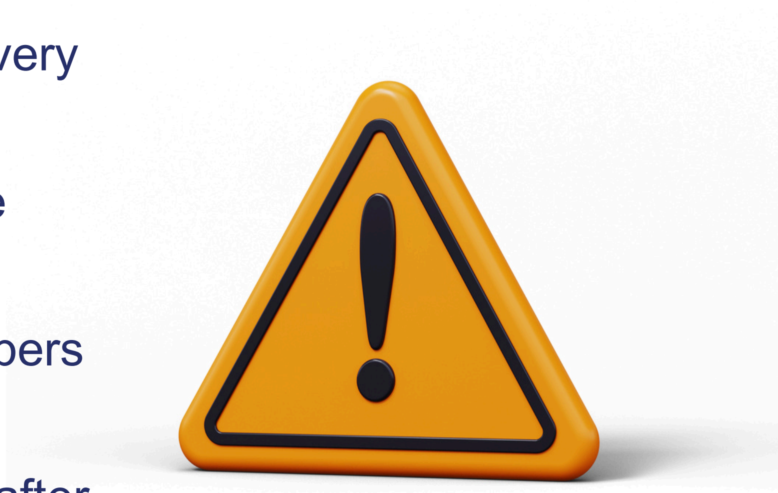
- Can leadership quickly see what is happening?
- Do managers have access to the same information?
- Are reports consistent from week to week?
- Can your team make decisions without chasing down updates?
- Do you trust the numbers you are using?

BUSINESS VISIBILITY CHECKLIST

- [ ] We can quickly see current business performance across operations, sales, billing, and service.
- [ ] Leadership has access to reliable reporting without requesting manual updates from multiple people.
- [ ] Our reports are consistent, accurate, and easy to understand.
- [ ] We have clear visibility into revenue, outstanding payments, utilization, dispatch activity, and customer status.
- [ ] Our team does not rely on memory, notes, text messages, or disconnected spreadsheets to understand what happens.
- [ ] We can spot problems before they become urgent.
- [ ] Our data helps us make decisions.

Warning Signs:

- You need multiple spreadsheets to answer one question.
- Reports are built manually every week or month.
- Different team members give different answers.
- You do not know which numbers are most accurate.
- You only discover problems after a customer complains.
- Leadership has to ask for updates instead of seeing them.



Why It Matters:

Visibility is the foundation for better decisions. When business data is scattered, leaders spend more time collecting information than acting on it. Clean, connected visibility helps teams move faster, reduce confusion, and operate with more confidence.

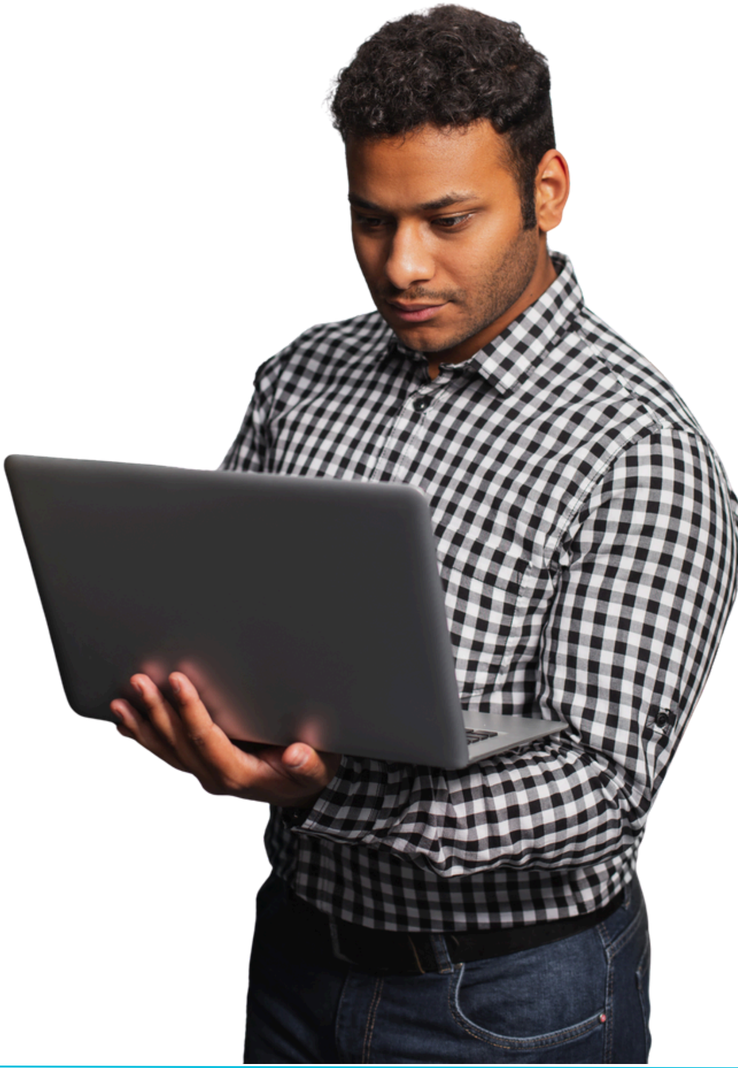
02 Customer & Account Data

Customer data should give your team a complete view of each account, relationship, order, job, issue, and opportunity.

But when customer information is incomplete or spread across multiple systems, it can create problems for sales, service, billing, and operations.

Ask Yourself:

- Do we have one reliable place to view customer information?
- Can sales, service, operations, and billing all see the same customer details?
- Can we easily understand customer history?
- Do we know which customers are active, inactive, overdue, or growing?
- Can we identify customers who may need follow-up?

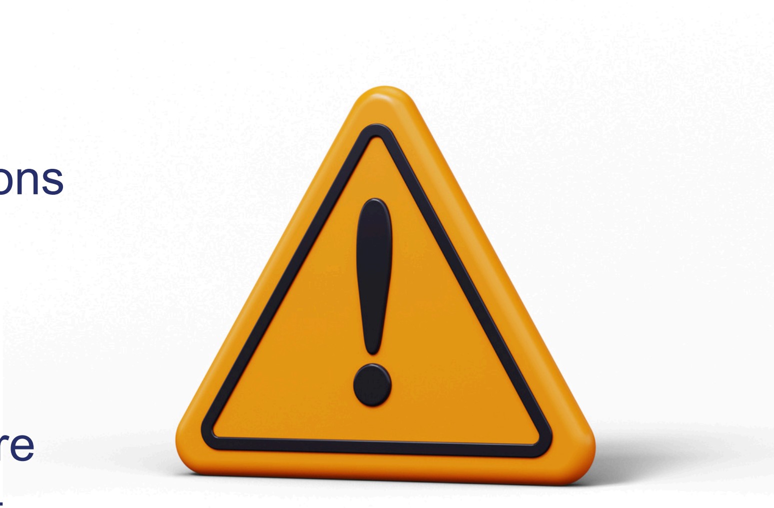


CUSTOMER & ACCOUNT DATA CHECKLIST

- [ ] Each customer account has accurate contact information.
- [ ] We can see customer history, including orders, service, billing, and communication.
- [ ] Customer data is easy for the right team members to access.
- [ ] We can segment customers by status, location, service type, industry, or opportunity.
- [ ] We know which customers are active, inactive, overdue, or at risk.
- [ ] We can identify high-value customers and growth opportunities.
- [ ] Customer notes and updates are stored in a consistent place.
- [ ] Sales and operations work from the same customer information.

Warning Signs:

- Customer information lives in email threads, spreadsheets, or individual notes.
- Sales has one version of the customer record and operations has another.
- Your team has to ask, “Who talked to this customer last?”
- Important customer details are known by one person but not documented.
- Billing issues happen because account details are incomplete or outdated.



Why It Matters:

Strong customer data improves service, retention, billing accuracy, and growth. When your team has a complete customer view, they can respond faster, communicate better, and identify opportunities before they are missed.

03 Asset & Inventory Visibility

For portable operators, assets are the business.

Whether you manage containers, portable restrooms, trailers, offices, storage units, or equipment, you need to know what you have, where it is, what condition it is in, and whether it is making money.

Ask Yourself:

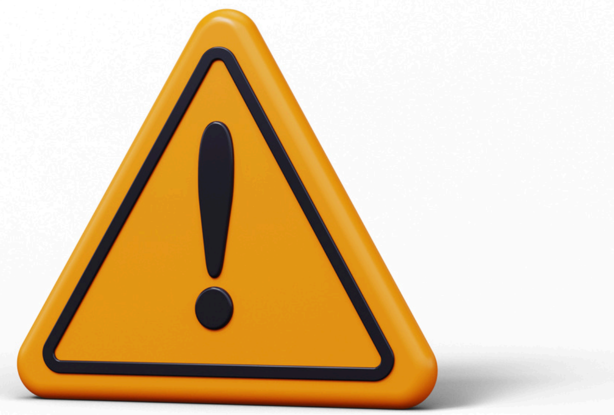
- Do we know where every asset is right now?
- Can we see which assets are available, rented, reserved, in service, damaged, or idle?
- Can we quickly identify underused assets?
- Do we know when assets need maintenance, cleaning, repair, or replacement?
- Can we connect asset data to revenue?

ASSET & INVENTORY VISIBILITY CHECKLIST

- [ ] Asset status is updated regularly and accurately.
- [ ] We can see where each asset is located.
- [ ] We know which assets are available, rented, reserved, damaged, in transit, or out of service.
- [ ] We can track utilization by asset type, location, customer, or service area.
- [ ] Every asset has a unique identifier.
- [ ] Maintenance, repair, and cleaning history is documented.
- [ ] Asset data connects to billing and customer records.

Warning Signs:

- Your team has to physically check the yard to confirm availability.
- Assets are marked available when they are not actually ready.
- You do not know how many units are idle.
- Damaged or unavailable assets are not clearly flagged.
- Billing does not always match actual asset usage.
- Asset information changes depending on who you ask.



Why It Matters:

Poor asset visibility creates delays, missed revenue, billing errors, and customer frustration. Better asset data helps operators maximize utilization, avoid overbuying, improve dispatch accuracy, and protect profitability.

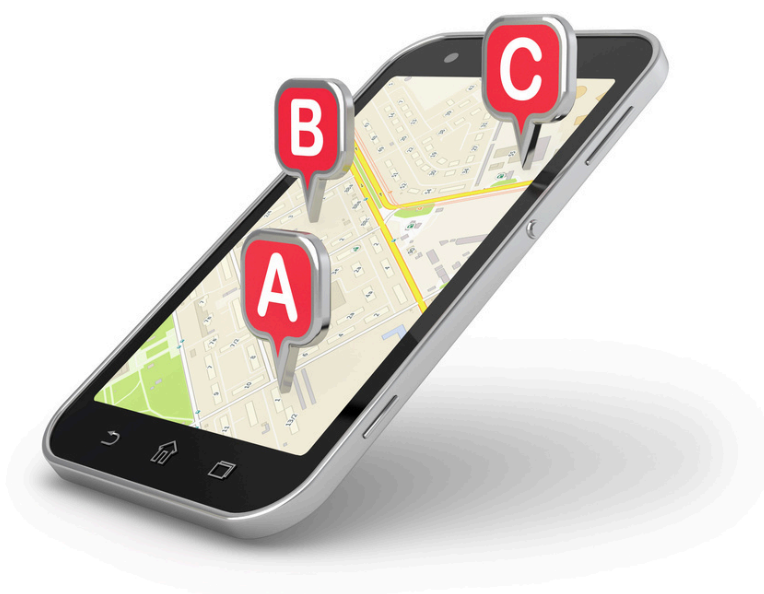
04 Dispatch, Service & Route Data

Dispatch and service teams are often where data problems become customer problems.

If schedules are unclear, routes are inefficient, job details are incomplete, or updates are delayed, the result is missed deliveries, missed pickups, wasted fuel, unhappy customers, and stressed teams.

Ask Yourself:

- Can dispatch see the full schedule clearly?
- Are drivers and service teams working from accurate job details?
- Can we track job status in real time?
- Do we know when routes are inefficient?
- Can we quickly adjust when something changes?

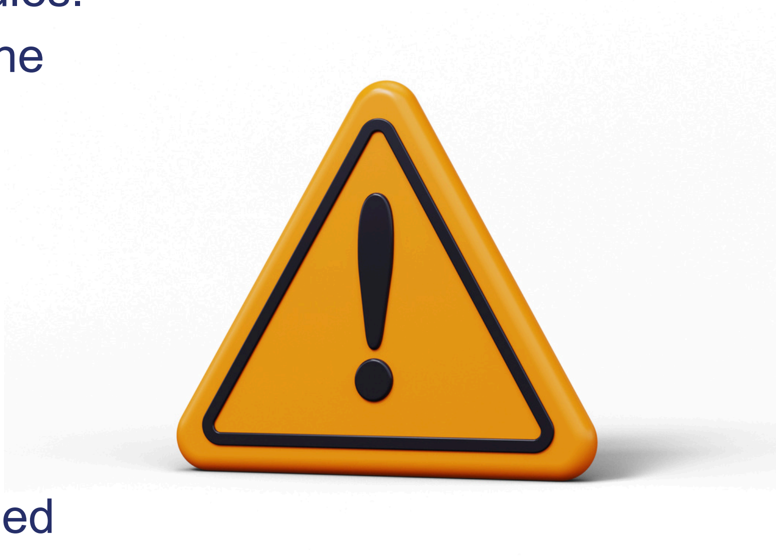


DISPATCH, SERVICE, ROUTE DATA CHECKLIST

- [ ] Dispatch has a clear view of scheduled deliveries, pickups, services, and repairs.
- [ ] Job details are accurate and easy for drivers or service teams to access.
- [ ] Route information is organized and updated.
- [ ] We can see job status from scheduled to completed.
- [ ] Teams can document issues from the field.
- [ ] Missed or delayed jobs are easy to identify.
- [ ] We can evaluate route efficiency.
- [ ] Dispatch, billing, and customer service are aligned on completed work.

Warning Signs:

- Dispatch relies heavily on phone calls, texts, or printed schedules.
- Drivers do not always have the latest job details.
- Service completion is not documented consistently.
- Customer service has to ask dispatch for updates.
- Billing is delayed because completed work is not recorded quickly.
- Route inefficiencies are known but not measured.



Why It Matters:

Better dispatch and route data helps teams reduce wasted time, improve customer communication, increase completed work, and protect margins. When field activity is connected to the rest of the business, everyone works from the same source of truth.

05 Sales & Pipeline Insights

Growth does not happen only when new leads come in. Growth happens when your team can clearly see where opportunities are, who needs follow-up, what is likely to close, and where deals are getting stuck.

Without pipeline visibility, sales activity becomes reactive.

Ask Yourself:

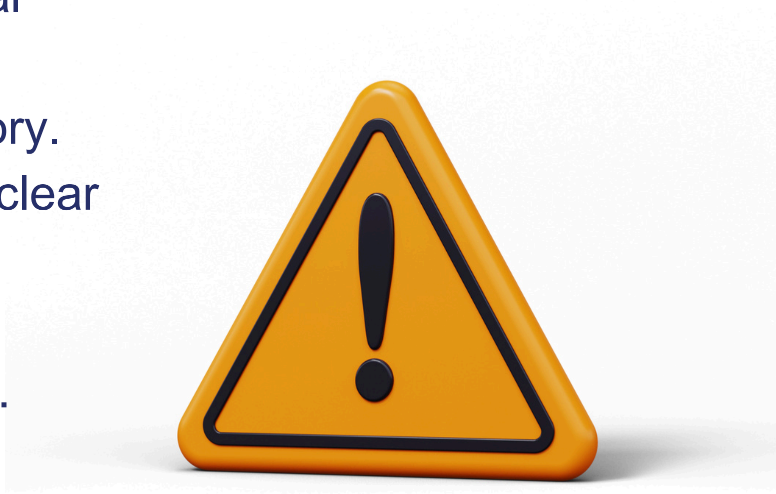
- Do we know where each opportunity stands?
- Can we see which prospects need follow-up?
- Do we understand why deals are won or lost?
- Can we forecast future demand?
- Are sales and operations aligned on upcoming business?

SALES & PIPELINE INSIGHTS CHECKLIST

- [ ] Leads and opportunities are tracked consistently.
- [ ] Sales follow-up activity is documented.
- [ ] We can see which prospects are active, stalled, won, or lost.
- [ ] We understand common reasons deals are lost.
- [ ] We can identify which type of customer creates the strongest opportunities.
- [ ] Sales forecasts help operations plan for demand.
- [ ] Sales and operations communicate clearly about upcoming needs.
- [ ] All teams can see pipeline performance.

Warning Signs:

- Opportunities are tracked in individual inboxes or personal notes.
- Follow-up depends on memory.
- Leadership does not have a clear view of pipeline.
- Sales does not know which prospects are most engaged.
- Operations is surprised by upcoming demand.
- Lost deals are not reviewed for patterns.



Why It Matters:

Sales data helps operators move from reactive selling to intentional growth. When pipeline insights are clear, teams can prioritize the right opportunities, improve follow-up, forecast demand, and align sales with operations.

06 Billing, Payments & Revenue Data

Billing data is one of the most important areas of the business because it directly affects cash flow.

Even small gaps between operations and billing can lead to missed charges, delayed invoices, underbilling, customer disputes, and revenue leakage.

Ask Yourself:

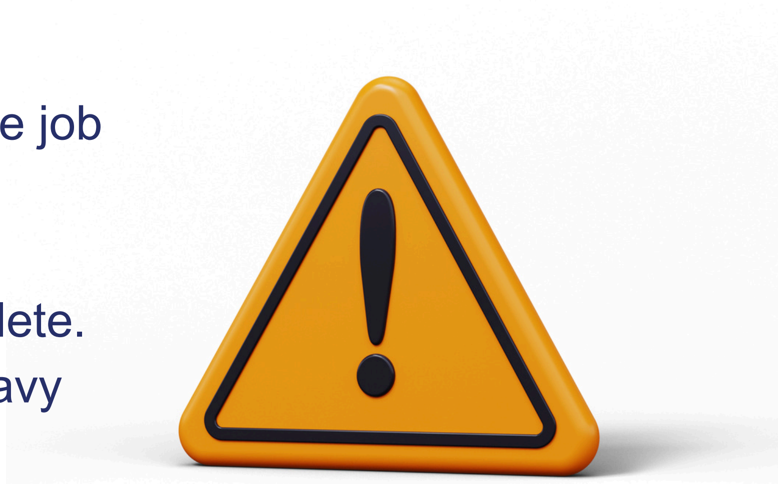
- Does billing accurately reflect what happened in the field?
- Are invoices created on time?
- Can we easily see overdue accounts?
- Are recurring charges accurate?
- Do we know where revenue may be leaking?

BILLING, PAYMENTS & REVENUE CHECKLIST

- [ ] Billing is connected to actual rentals, services, deliveries, pickups, and changes.
- [ ] Invoices are accurate and timely.
- [ ] Recurring billing is easy to manage and verify.
- [ ] Overdue accounts are visible.
- [ ] Payment status is easy to track.
- [ ] Adjustments, credits, discounts, and special terms are documented.
- [ ] Billing disputes can be researched quickly.
- [ ] We can identify possible revenue leakage.

Warning Signs:

- Billing depends on manual updates from dispatch or operations.
- Invoices are delayed because job completion is unclear.
- Customers dispute charges because records are incomplete.
- Recurring billing requires heavy manual review.
- Your team finds missed charges after the fact.
- Aging reports are difficult to interpret or act on.



Why It Matters:

Clean billing data protects revenue and cash flow. When billing is connected to operations, businesses reduce manual work, improve accuracy, and capture revenue that might otherwise be missed.

07 Team Communication & Process Data

Data is not just about reports. It is also about how information moves through your business.

If your team depends on verbal updates, one-off texts, or individual knowledge, the business becomes harder to scale. Strong processes make data more reliable.

Ask Yourself:

- Does everyone know where to record important updates?
- Are processes consistent across teams?
- Can a new employee understand how information flows?
- Are responsibilities clearly defined?
- Do we have too many workarounds?

TEAM COMMUNICATION & PROCESS CHECKLIST

- [ ] Team members know where to enter and find important information.
- [ ] Processes are documented for common workflows.
- [ ] Teams do not depend on one person's memory.
- [ ] Sales, dispatch, service, operations, and billing follow shared processes.
- [ ] Exceptions are documented clearly.
- [ ] Leadership can identify bottlenecks.
- [ ] New employees are easily trained on systems and processes.
- [ ] Workarounds are reviewed and reduced over time

Warning Signs:

- Only one or two people know how certain things work.
- Different employees handle the same process in different ways.
- Updates are shared verbally but not documented.
- Important information gets lost between teams.
- Workarounds have become permanent.
- Training new employees takes longer than it should.

Why It Matters:

Better process data helps businesses scale. When teams follow consistent workflows, information becomes easier to trust, reporting becomes more accurate, and employees spend less time chasing answers.

08 Reporting & KPI Tracking

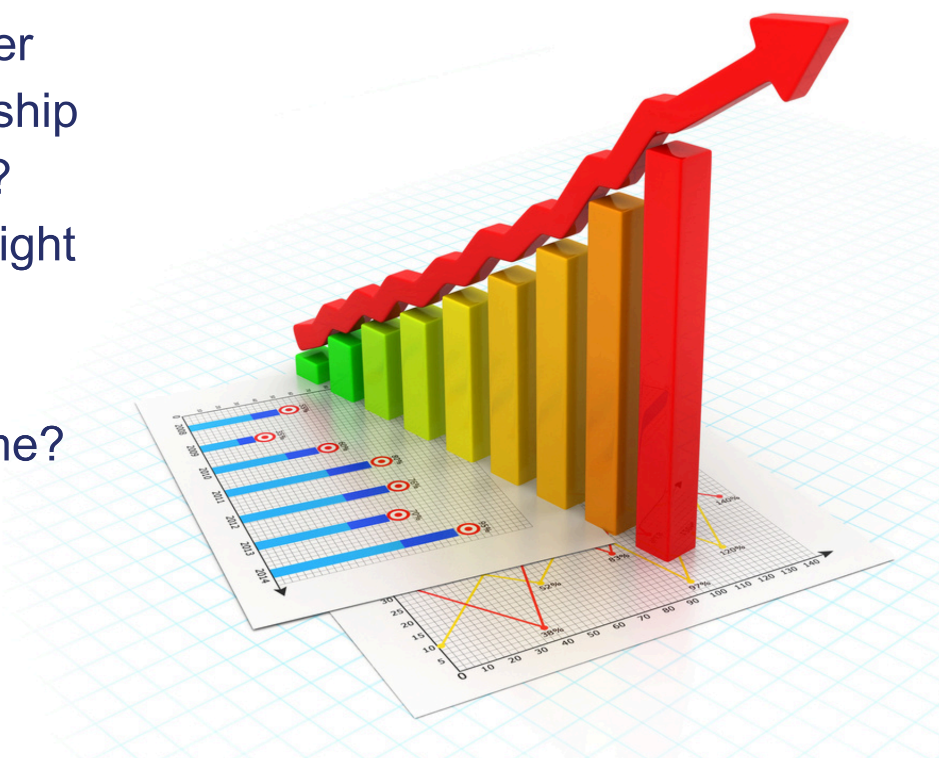
Reports should help your business make decisions.

But too often, reporting becomes a time-consuming exercise that looks backward without helping leaders understand what to do next.

The best reports are simple, consistent, and tied to business outcomes.

Ask Yourself:

- Do our reports answer the questions leadership actually cares about?
- Are we tracking the right KPIs?
- Can we compare performance over time?
- Do reports lead to action?
- Are we spending too much time building reports manually?



REPORTING & KPI TRACKING CHECKLIST

- [ ] We have a clear set of business KPIs.
- [ ] Leadership can view performance without waiting for manual updates.
- [ ] KPIs connect to revenue, operations, service quality, utilization, and customer health.
- [ ] Reports are easy to understand.
- [ ] We can compare performance by week, month, quarter, or year.
- [ ] We can identify trends, not just isolated numbers.
- [ ] Reports lead to decisions and next steps.
- [ ] We review reporting regularly and remove metrics that do not matter.

Useful KPIs to Consider:

- Asset utilization
- Revenue by customer, location, or asset type
- Open opportunities
- Win/loss trends
- Overdue invoices
- Average days to payment
- Completed deliveries
- Missed or delayed jobs
- Route efficiency
- Service completion rates
- Idle inventory
- Customer retention
- Revenue leakage indicators

Warning Signs:

- Only one or two people know how certain things work.
- Different employees handle the same process in different ways.
- Updates are shared verbally but not documented.
- Important information gets lost between teams.
- Workarounds have become permanent.
- Training new employees takes longer than it should.

Why It Matters:

Strong reporting gives leaders confidence. The goal is not to track everything. The goal is to track the right things clearly enough to make better decisions faster.

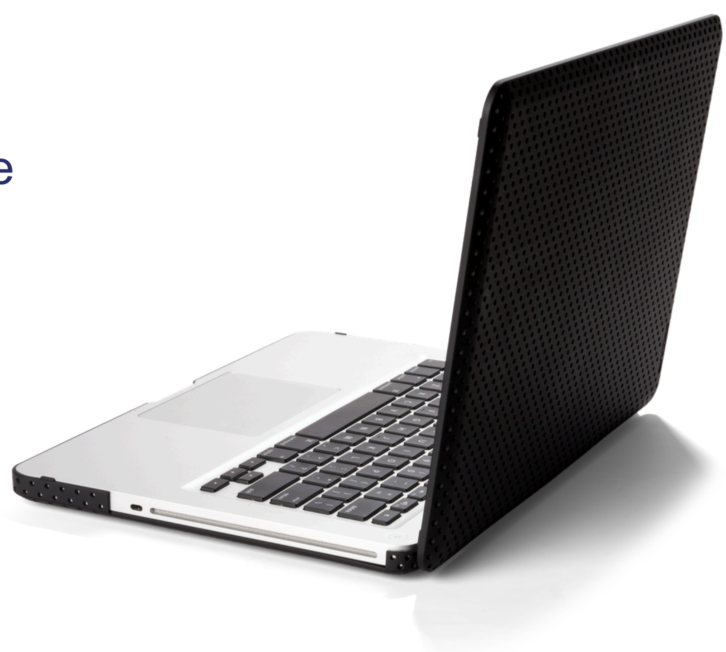
09 System & Integration Health

Even good data can become unreliable when systems do not work together.

If your business uses separate tools for CRM, billing, dispatch, asset tracking, marketing, accounting, or customer communication, integration gaps can create manual work and inconsistent information.

Ask Yourself:

- Do our systems share information effectively?
- Are we entering the same information in multiple places?
- Are integrations reliable?
- Do teams trust the systems they use?
- Are we using technology to reduce manual work?



SYSTEM & INTEGRATION HEALTH CHECKLIST

- [ ] Our core systems are connected.
- [ ] Teams do not have to enter the same information multiple times.
- [ ] Customer, asset, billing, and dispatch data are aligned.
- [ ] Integrations are monitored and maintained.
- [ ] Manual exports and uploads are limited.
- [ ] We have a single source of truth for information.
- [ ] Our technology supports how the business actually operates.
- [ ] We regularly review whether our systems still fit our needs.

Warning Signs:

- Teams manually copy information from one system to another.
- Data is exported to spreadsheets before it can be used.
- Different systems show different answers.
- Integration issues are discovered only after something breaks.
- Employees avoid systems because they are too difficult or unreliable.
- Technology creates more work instead of reducing it.

Why It Matters:

Connected systems reduce manual work, improve accuracy, and help businesses scale. When tools do not communicate, teams spend more time managing data than using it.

Priority Action Plan

After completing the checklists, identify your top three opportunities for improvement.

Priority 1:

Why This Matters:

First Step to Improve:

Owner: **Target Date:**

Priority 2:

Why This Matters:

First Step to Improve:

Owner: **Target Date:**

Priority 3:

Why This Matters:

First Step to Improve:

Owner: **Target Date:**

Conclusion

Better Data Creates Better Operators

Portable businesses move fast. Customers need answers. Assets need to be tracked. Routes need to be managed. Invoices need to be accurate. Teams need to stay aligned.

The more your business grows, the more important visibility becomes.

Better data does not mean making your business more complicated. It means making the right information easier to access, trust, and use.

When your team has cleaner data and better insights, you can:

- Reduce manual work
- Improve customer service
- Increase asset utilization
- Protect revenue
- Strengthen billing accuracy
- Spot problems earlier
- Make faster decisions
- Scale with more confidence

The goal is not to track everything.
The goal is to see what matters.

Ready for Better Visibility?

If your business still relies on disconnected spreadsheets, manual reporting, or systems that do not give you the full picture, it may be time to rethink how your data works.

Omni~View helps portable operators bring critical business information together, giving teams better visibility across customers, assets, dispatch, billing, reporting, and growth.

With the right data in the right place, your team spends less time chasing answers and more time running the business.

Better visibility starts with better data.

Get Better Visibility - Learn How

OMNI~VIEW