

Keys to success: *your operations lead.*

Every implementation that works has one person on your side who owns the platform. Every one that stalls is missing that person. This page is what the role is, why it exists, and what it owns each week. Name them before kickoff.

What the role is.

One person, named	Not a committee and not the executive sponsor. Someone who runs operations day to day, has authority over dispatchers and billing, and can decide a setting without a meeting.
The owner of the counts	The Action Filters are the operating standard: every status that needs a person rolls up to an Action Filter with an owner, and the owner takes it to zero. The operations lead owns the row and assigns the Action Filters.
The one who says how it will work	Contracts matrix, billing methods, custom statuses, who sees whom. These are decisions, not configuration. Your Customer Success Manager can build them; only you can make them.

Why implementations fail without one.

WHAT HAPPENS	WHY
Rates are loaded three ways by three people, and every invoice needs a hand.	Nobody decided the pricing model, so each loader made their own decision.
The Action Filters read 999+ and the team goes back to the raw list and a monthly audit.	Nobody owned the counts, so old work was never closed and the counts stopped being believed.
Vendors call your desk asking what the email is.	Nobody owned the invite sequence.
The Client is billed twice, or not at all.	Nobody decided the money model for the recurring contract.
Go-live slips a month.	Every decision waited on a meeting.

What they own, each week.

WHEN	WHAT	PROOF
Every day	Read the row. Every Action Filter has an owner and every owner is at zero or has a dated note.	No count that was there yesterday is there today.
Every week	Attention on Scheduled Services empty. Not Mapped filter at zero on integrated Clients. Sites with no Manager: zero.	Three numbers, all zero.
Every month	Custom statuses with no Work Orders retired. Invoice count matches the money model per Client. Vendor compliance chased.	The billing reconciliation closes without a hunt.
Every quarter	A settings review with your Customer Success Manager against the 12 settings. Rates for the new contract year uploaded, not typed.	The 12 settings sheet, initialed.
Every season	Snow: the eight-step setup signed off by October 15.	The sign-off sheet, eight dates.

Put it in the contract.

Name the operations lead in the implementation agreement, with the weekly list above as their responsibilities. It is the single strongest predictor of an implementation that finishes on time, and it costs nothing to write down.

Questions? Contact your Customer Success team or email support@utilizecore.com.