AN INTRODUCTION TO

Salesforce Field Service

(formerly Field Service Lightning)

CloudKettle

FIELD SERVICE is an add-on to Service Cloud, Salesforce's customer service management platform. It is Salesforce's solution to managing a team of service technicians who visit customer sites.

Today, customers request service from many channels, including:

- Chat
- Phone
- Email
- Retail Locations
- Point of Service
- Internet of Things (IoT)

Managing requests from various sources can be a challenge. Service Cloud, in conjunction with Salesforce Field Service, consolidates all service requests from customers into a single, easily managed space. Users can create Work Orders for customer cases to track the type of service a customer requires and make Service Appointments for Work Orders to track the service visit.

Salesforce Field Service has three main pillars:

SERVICE CLOUD
This contains the core CRM information
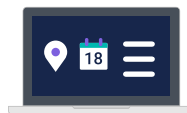
DISPATCHER CONSOLE
Used to schedule and dispatch service appointments

MOBILE APP
Used by Service Technicians to view jobs they work on and any associated details

Salesforce Field Service is entirely on the cloud. No longer will Service Technicians feel a lack of support at job sites. Service Managers and Dispatchers can provide real-time updates to their entire team, and those working in the field can access information anywhere, anytime. Gone are the days of carrying work order sheets, bulky manuals and signed confirmations to and from job sites. With the Field Service Mobile App, technicians can view job details, read product specifications and get work order confirmation all on their phone or tablets.

Field Service Management

Field Service Management (FSM) is the functional area of a business that manages the operations of employees visiting customer sites for services, such as repairs or maintenance.

Salesforce Field Service helps tackle the common problems in FSM, including:

- High Servicing Costs
- Lack of Visibility by Service Managers of Technicians' Work
- Manual Processes
- Inefficient Scheduling
- Service Inventory Management
- Customer Satisfaction & Experience
- Managing Offline Work and Documentation
- Remote Field Service
- Service Technology Disconnect From Other Company Systems
- Technician Turnover

By solving these problems, Service Departments can achieve important KPI targets like:

Improve First-Time Fix Rate	Increase Service Tech Utilization	Decrease Tech Travel Time	Improve or Maintain Service Levels

How Salesforce Field Service Solves Common FSM Problems

First-Time Fix Rate

One of the most effective ways to reduce service costs is to get it right the first time. Research from Aberdeen Group showed that this is easier said than done. **The bottom 30% of companies in their study had an average first-time fix rate of only 63%.** For a company with 100 visits per day on average, 37 of those jobs will require an additional visit. If the cost to roll a truck and technician to a service site is on average $300, then this is approximately $4 million a year that a company could have saved had technicians solved the issue during the first visit.

The two most commons reasons for not solving the problem the first time are:

- The technician does not have enough information about the customer's problem.
- The technician does not have the right parts or tools to complete the customer's service needs.

Not Enough Information About the Problem

A lack of information stems from siloed departments. For example, customer information is in one system, and service-related information is often in another. For today's Field Service operations, having a 360-degree view of the customer is a must.

With Service Cloud, a company can track products or equipment that a customer purchases or leases to their Account record with the 'Asset' object. Service users can create cases against the specific customer asset, and Service Technicians can see all information regarding the company's touches with the customer asset, including service history.

Before or during a job, the technician can use their mobile device to know the issues the customer/equipment is facing and any servicing history.

Inappropriate Parts and Skills to Complete Service

Another common reason for repeat visits is the technician does not have the right parts, tools, equipment and sometimes even skills to complete the work. For some companies, optimizing the right equipment for a job results in significant savings. As an example, it is far more expensive to send a truck with a boom (hydraulic crane) to a job that only requires a technician with a van and a ladder.

A 'Work Type' in Salesforce is a template that a company can use to standardize the work done for customers.

With 'Work Types,' a technician will know which products and tools to take with them to a job site, as this information will be readily available to them on the Work Order record.

As part of schedule optimization in Field Service, a Service Manager can create a rule where only Service Technicians who have the skills required for a 'Work Type' can be assigned to the job.

By standardizing work with 'Work Types' and providing Service Technicians with a holistic view of the customer's equipment/product, companies can reduce re-visits and increase first-time fix rates. These measures not only reduce cost but increase customer satisfaction.

## Reduction in Generated Revenue (for companies who charge for servicing separately)

Another impact of a low first-time fix rate is a reduction in revenue. Dispatching Service Technicians multiple times for the same service, especially when a company covers that servicing under a warranty or service agreement, means they are spending less time generating new revenue.

Lack of Visibility

Dispatchers who are using legacy tools or spreadsheets do not have visibility of their Service Technician's work, which makes it difficult to tell where techs are at any given time and who may be available for an emergency job nearby. For companies dispatching technicians with a daily memo of Service Appointments, Service Managers need to guess who is closest to a job site. With more complex cases dealing with specific servicing territories, this becomes an even more significant challenge.

Increasing visibility helps Service Managers and Dispatchers prepare for unexpected issues.

Emergency fixes, accidents, and unforeseen stand-still traffic don't have to derail the service business. Salesforce's Dispatcher Console Map shows Service Managers and Dispatchers where technicians are in the field at all times.
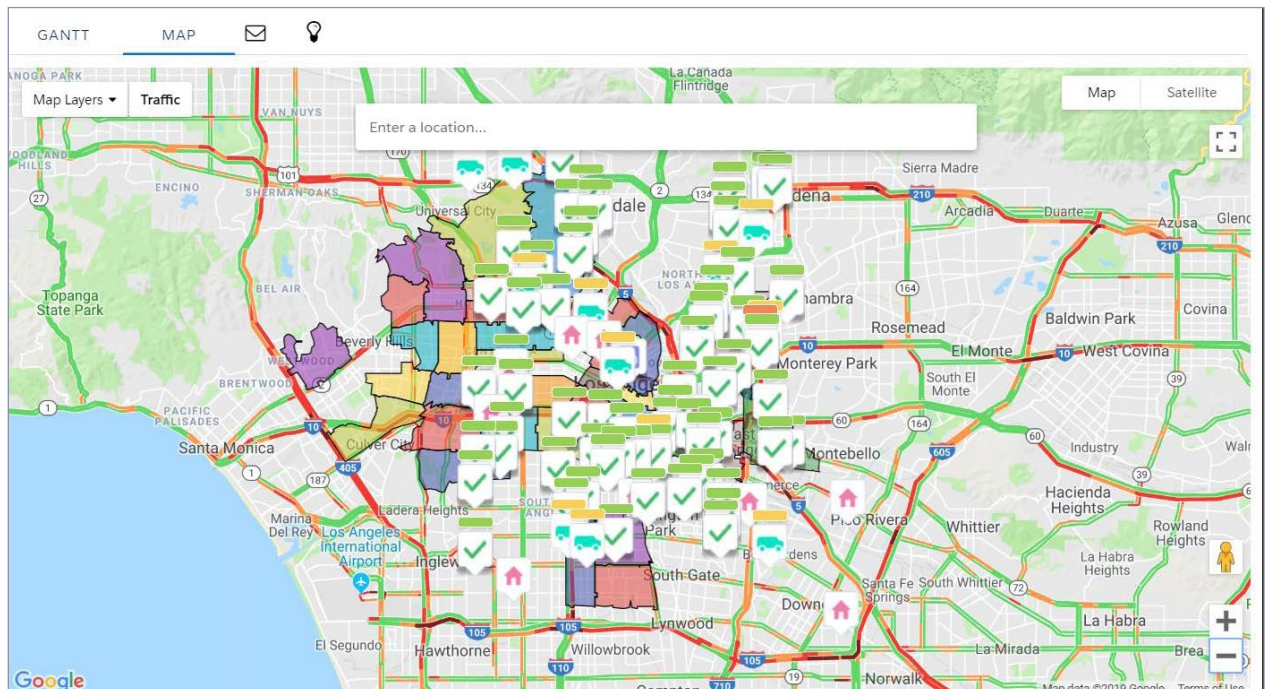
Manual Work/Paper Work

Scheduling, Dispatching, and Viewing Service Jobs

Many companies continue to use spreadsheets to manage scheduling and dispatching Service Appointments. Aside from the fact that it becomes cumbersome to make changes due to unforeseen issues, such as when someone calls in sick, it is an unscalable practice that results in a large amount of manual and often erroneous efforts.

With Salesforce Field Service, Service Appointments are put in a queue and are visible on the Service Manager's/Dispatcher's console:
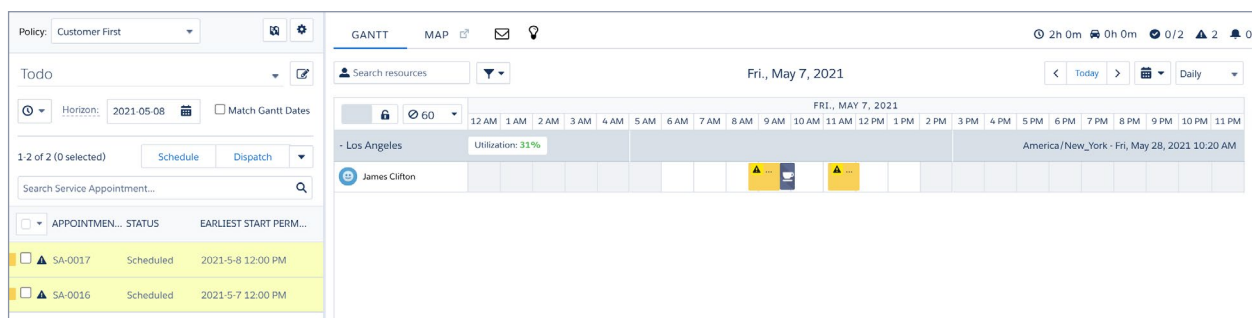
Dispatchers can easily schedule Service Appointments by dragging them to a Service Technician's calendar using the Gantt view. There is no need to cross-reference a Service Technician's availability with spreadsheets. Instead, the Gantt displays a Service Tech's Service Appointments, working hours, and scheduled breaks.

The Service Technician will see their calendar on their mobile device, including any upcoming Service Appointments, and won't need to carry with them any memos of the day's work.

> *With automated scheduling and a much better interface to manage appointments, Dispatcher and Service Manager productivity will increase, as they spend less time on manual tasks.*

While technicians are in the field, they can receive real-time updates if a customer cancels. Similarly, customers can receive updates by email or SMS (if configured in Salesforce) when appointments are running ahead or behind schedule.

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Customer Sign-Off

Some companies require customers to sign off on Service Appointments on paper documents provided by the technician. This requires administrative support staff or Service Technicians to print out Work Order forms before loading their truck for the day, bring them to a job site, and then submit them at the end of their shift. Manual Work Order confirmation forms are an unneeded administrative burden on Service Technicians and Managers.

With the Salesforce Field Service Mobile App, a technician can generate a Work Order confirmation form, which the customer can sign directly on the mobile device. Once the customer signs, Salesforce saves the PDF to the Work Order and the customer receives confirmation at the same time.

Manuals

Service Technicians often carry manuals as a reference for repair or maintenance needs; however, sifting through a manual during a job visit to find the page specific to the customer's equipment can be time-consuming. Additionally, product manuals can quickly become outdated, leaving the technician with insufficient information to provide service.

Within the Field Service Mobile App, Service Technicians can view job-related Knowledge Articles as a related list on the Work Order. Thus, they can access just the relevant information on a tablet or phone without going through 100s of pages in a manual.

Companies can also publish a new article version in Salesforce with the latest updates instead of waiting to consolidate yearly feedback into a new manual. As such, technicians will always have access to the most up-to-date information.

Inefficient Scheduling

Scheduling through spreadsheets and legacy software wastes a lot of time and money for service departments thanks to process inefficiencies. As a result, technicians spend more time travelling to jobs than needed, which results in low tech utilization and higher vehicle costs.

Salesforce Field Service's Optimizer reduces the manual effort in scheduling servicing jobs and optimizes the schedule based on business needs and priorities.

For example, a service department can prioritize reducing travel time and ignoring all other variables such as servicing a customer as soon as possible. Then, once the optimizer finishes running, it creates a schedule for each Service Technician to reduce travel time as much as possible.
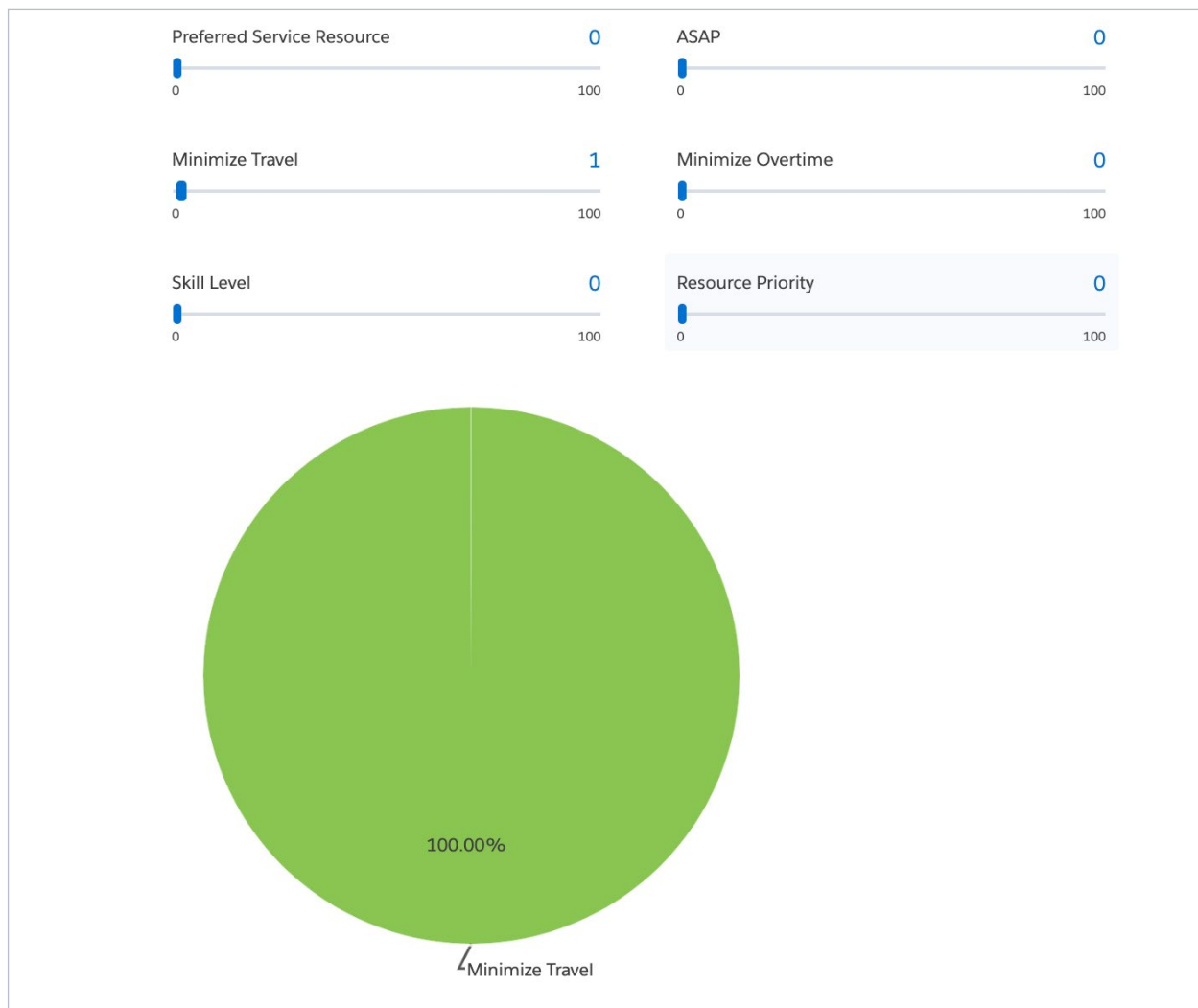
However, this finished schedule wouldn't distinguish between a customer who has been waiting for a week versus one who recently created a service request. As a result, the schedule will reduce costs, decrease tech travel time and increase tech utilization; however, it can also hurt customer satisfaction, with some customers potentially having to wait a long time for service.

The optimizer will find the best schedule based on the Scheduling Policy inputs. It's important to weigh the Service Objectives based on business priorities. The following default policies exist for companies to get started with:

- **Customer First**, which prioritizes service ASAP to the customer.
- **High Intensity**, which prioritizes employee productivity and service departments, can use during high service times such as after storm outages.
- **Soft Boundaries**, which is similar to 'Customer First,' but allows for Service Techs to work in other territories to increase service coverage.

Minimizing Overtime

Another high cost for service departments is overtime. Using the Optimizer, service departments can set minimizing overtime as a service objective. If a company uses third-party contractors and employees, in some cases, it may be more cost-effective to utilize the contractors instead of overtime for internal employees. Field Service also helps companies comply with union stipulations and regulations using a feature called 'Work Rules.'

Salesforce offers Field Service licenses for contractors. You can find more details here.

Service Inventory Management

A disconnect between a company's systems decreases productivity and results in decision-making based on outdated information.

Salesforce Field Service makes it easy for technicians to know exactly which parts and tools they need to take with them on the job. It also helps solve another problem service departments have—keeping track of how much inventory they have remaining in their warehouses and service centers. Inaccurate tracking often leads to inventory shortages, which in turn lead to higher costs, as a company may need to purchase emergency parts at higher prices.

As their day begins, Service Technicians load their trucks with the parts and tools they need for the day. Additionally, once the technician completes their day and has some unused products, they will return them to the service center. With Field Service, conducting inventory checklists on a tablet or phone increases time savings and simplifies daily inventory management for technicians.

> *Field Service comes with an entire data model dedicated to Inventory Management to track product storage, production consumption, and products returned.*

Also, Salesforce can integrate with an ERP. With this, the ERP would be the source for inventory levels at each service location. Salesforce would update the data in the ERP at a transactional level based on the products that Service Technicians consume and return.

Customer Experience

Maintaining customer satisfaction while reducing costs is one of the most significant challenges facing service departments.

While customers benefit from a company maintaining appropriate inventory levels, optimized scheduling and managers' increased visibility over their technicians, specific touchpoints with the company shape their experience more significantly.

Creating a service request, receiving service, and the time between those two events play the most significant role in a customer's service experience.

B2B Customers

Your B2B customers demand speed of service; any delays can negatively impact their bottom line. For example, a coffee shop reliant on their machines can quantify the loss in business by counting every customer they have to turn away that orders coffee only that machine can make.

For organizations that mainly service businesses, users can prioritize the 'ASAP' scheduling policy to meet these customer's needs in the Field Service Optimizer.

B2C Customers

Today's B2C customers want an 'uberization' of the service process. They demand to know exactly when a technician will arrive at their home and want companies to remind them of upcoming service appointments. Above all, these customers value effortlessness in the process. They do not want to jump through hoops to request service.

Salesforce's Appointment Assistant enhances the customer experience with automated alerts sent to customers through SMS, Email or WhatsApp. Companies can provide customers with arrival time, the name and photo of the technician, and the location of the technician once they are on the way to the customer.

Offline Work

For companies where Service Technicians work in environments with little to no connectivity, it can be a challenge for the technician to retrieve information about the customer's problem or update the Work Order with service details. Often, when users cannot make updates at the time of servicing, they forget to do so altogether.

Salesforce built the Field Service app 'Offline-First.' With 'Offline Priming,' the Field Service Mobile App downloads all details related to a technician's Service Appointments as soon as they log in. Even if the technician loses connectivity, they can view details of the job and any Knowledge Articles required to perform the service.

Additionally, for any updates that a technician makes offline, the mobile app adds them to a pending upload queue. Once the mobile device regains connectivity, it **automatically** syncs the changes to the Salesforce server.

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Evolution of Service

Remote Service

COVID-19 created many business and consumer changes. For one, it pushed service departments to adopt the concept of Remote Service more quickly.

Visual Remote Assistance is an add-on to Service Cloud with which technicians can remotely help resolve customer issues. Technicians can video call customers and guide them through self-service of the equipment/product. In line with safety guidelines, technicians can drop off any required parts to the customer's home and guide them through Visual Remote Assistance without ever stepping inside their home.

Virtual Remote Assistance also allows technicians to video call experts to help them in situations requiring further assistance. With this, Service Technicians always have support when they are in the field, helping to achieve their service goals in one visit.

To read more about how your company can benefit from **Visual Remote Assistance**, see the following blog post.

Internet of Things

Through the Internet of Things (IoT), customer equipment can directly notify the provider without any customer involvement.

Additionally, companies can remain aware of current equipment conditions and offer preventative maintenance instead of reactive maintenance.

For additional information on **IoT and Field Service**, see this blog post by Salesforce.

Real-Time Analytics

Through the Field Service **Analytics App**, Service Managers can get real-time insights into key metrics such as workforce utilization, first-time fix rates and travel times.

For more information on the **Analytics App**, visit this article.

Enhance your Business with Salesforce Field Service

Through decreasing manual processes, enhancing service call productivity, and optimizing technician schedules, Salesforce Field Service helps companies reduce costs while increasing both customer and employee satisfaction.

Field Service customers see direct savings in overtime, fuel, and printing costs.

Additionally, organizations benefit from increased employee productivity, improvements in employee and customer satisfaction levels, and increased visibility of field service operations.

Are you interested in learning how CloudKettle can help you implement Salesforce Field Service to enhance your business? Talk to us today.