

Salesforce Field Service Lightning Implementation Reduces Operational Cost by 21%

Company

3D Printer Manufacturer

Country

USA

Industry

Technology and Manufacturing

Implementation Partner



Teaming with the best



The Customer is a technology leader in 3D printing that combines software, hardware, and molecular science to deliver manufacturing solutions. They enable repeatable production of end-use parts with industrial-grade materials and exceptional surface finish.

Challenges

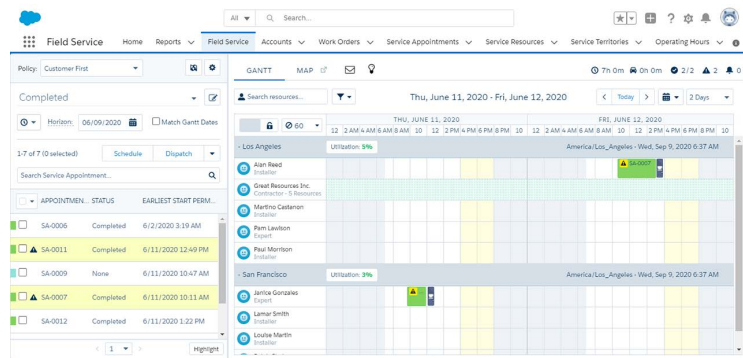
- Field service operations for both installations and repairs managed manually using calls/spreadsheets rendering it cumbersome to operate and inflexible to scale
- Disparate disconnected data leading to a severe loss of productivity, especially for service managers to keep track of work orders, inventory - parts ordering/shipment, technicians - schedules/unavailability, escalations etc
- Monitoring field technicians in real-time and little control over their utilization/productivity was challenging
- Laborious paper-work for technicians to create service reports after each field visit; prone to errors and often incomplete
- Lack of actionable insights due to unorganized data & manual paperwork

Solution

All core Field Service processes for printer installations (including site preparation activities), repairs and preventive maintenance were implemented in Salesforce Field Service Lightning leveraging standard out-of-the-box features.

- Scheduling Policies along with service objectives for streamlined scheduling based on territories, skill sets, and preferred resources
- Inventory set-up including the ability to track shipments, products consumed, as a part of every work order

- Dispatcher Console set-up for service managers with Gantt views allowing for a holistic view on technicians, their availability, upcoming service appointments etc
- Connected Ecosystem with Integrations to
 - a) Logistics/Transportation system to provide real-time status of parts shipment
 - b) Oracle Fusion ERP for inventory management / parts ordering
 - c) Engineering escalation system (JIRA) for field escalations
- For Inter-Country Travel (involving multiple days), a plugin was developed to enable Service Managers to assign technicians based on geographic and their ability to reduce travel time to service the work order
- FSL mobile app for Service Technicians with an intuitive console to view/track service appointments, check-in asset(s) to work on, update products consumed, create service report with just a few clicks
- Comprehensive analytics using Tableau and leveraging data from CRM, ERP, JIRA and others to monitor Field Productivity, SLA adherence, Rescheduling Ratio & Aging analysis



Dispatcher Console

App...	Status	Earliest Start Pe...	Due Date	Scheduled End	Scheduled Start	Service Terr...	Actual Start	Actual End
1 SA-0005	Dispatched	5/13/2020, 10...	5/16/2020, 10...	5/14/2020, 2.0...	5/14/2020, 12...	San Francisco		
2 SA-0006	Completed	6/2/2020, 3:19...	6/5/2020, 3:19...	6/2/2020, 10.0...	6/2/2020, 9:00...	San Francisco	6/2/2020, 9:00...	6/2/2020, 10:0...
3 SA-0007	Completed	6/11/2020, 10...	6/14/2020, 10...	6/12/2020, 3.0...	6/12/2020, 10...	San Francisco	6/12/2020, 12...	6/12/2020, 2:3...
4 SA-0009	None	6/11/2020, 10...	6/14/2020, 10...	6/11/2020, 5.0...	6/11/2020, 12...	San Francisco		
5 SA-0011	Completed	6/11/2020, 12...	6/14/2020, 12...	6/11/2020, 12...	6/11/2020, 9:3...	San Francisco	6/11/2020, 11...	6/11/2020, 12...
6 SA-0012	Completed	6/11/2020, 1.2...	6/16/2020, 1.2...	6/15/2020, 3.3...	6/15/2020, 12...	San Francisco	6/15/2020, 12...	6/15/2020, 3:0...
7 SA-0013	Completed	6/11/2020, 9.4...	6/16/2020, 9.4...	6/16/2020, 1.0...	6/16/2020, 12...	San Francisco	6/16/2020, 12...	6/16/2020, 1:0...
8 SA-0014	Completed	6/15/2020, 6.1...	6/20/2020, 6.1...	6/17/2020, 3.0...	6/17/2020, 9:0...	San Francisco	6/17/2020, 12...	6/17/2020, 3:0...
9 SA-0015	Scheduled	7/17/2020, 4.3...	7/20/2020, 4.3...	7/20/2020, 10...	7/20/2020, 8:5...	Los Angeles		
10 SA-0019	Scheduled	7/20/2020, 12...	7/23/2020, 12...	7/20/2020, 2.0...	7/20/2020, 12...	Los Angeles		
11 SA-0020	None	8/31/2020, 12...	9/9/2020, 12.0...					
12 SA-0021	None	10/31/2020, 1...	11/4/2020, 11...					

Service Appointment List

Work Or...	Work Type	Account	Priority	Status	Service Terr...	Start Date	End Date
1 00000003	Solar Panel Installation	Global Media	Low	Completed	San Francisco	6/8/2020, 12:00 PM	6/12/2020, 12:00 PM
2 00000004	Solar Panel Installation	Global Media	Low	Completed	San Francisco	6/1/2020, 12:00 PM	6/4/2020, 12:00 PM
3 00000005	Solar Panel Installation	Hersha Hospitality	Low	Completed	San Francisco	6/15/2020, 12:00 PM	6/17/2020, 12:00 PM
4 00000006	Solar Panel Installation	Hersha Hospitality	Low	Completed	San Francisco	7/6/2020, 12:00 PM	7/8/2020, 12:00 PM
5 00000007	Solar Panel Repair	Hersha Hospitality	Low	Completed	San Francisco	7/13/2020, 12:00 PM	7/16/2020, 12:00 PM
6 00000008	Solar Panel Repair	Hersha Hospitality	Low	Completed	San Francisco	7/20/2020, 12:00 PM	7/22/2020, 12:00 PM
7 00000009	Solar Panel Repair	Hersha Hospitality	Low	Completed	San Francisco	7/6/2020, 12:00 PM	7/9/2020, 12:00 PM
8 00000010	Solar Panel Installation	Acme	Medium	New	Los Angeles	7/20/2020, 12:00 PM	7/23/2020, 12:00 PM
9 00000011	Solar Panel Repair	Global Media	Low	New		9/9/2020, 12:00 PM	9/11/2020, 12:00 PM
10 00000012	Solar Panel Repair	Global Media	Low	New	Los Angeles	9/14/2020, 12:00 PM	9/17/2020, 12:00 PM

Work Order List

Benefits

- 12% Faster case resolution with streamlined field service processes and robust scheduling
- Better control with real-time visibility of field operations
- Improved field service productivity
- 21% reduction in travel costs due to optimised travel time