

Field Service Lightning Implementation for Salesforce Improves Agent Productivity by 14%

Company

Australia's Largest National Service Provider

Country

Australia

Industry

Healthcare Services

Implementation Partner



Teaming with the best



Australia's largest national service provider working in partnership with people of all ages on the autism spectrum, and their families to deliver evidence-informed solutions that are person-centered, family-focused and customer driven.

Challenges

- Inability to schedule recurring field appointments for therapy sessions.
- Inability to schedule group appointments involving multiple citizens.
- Customer added a new business line with different field service requirements rendering the current set-up inflexible to cater for.
- Lack of proper visibility into citizens financial information such as NDIS funds allocated/consumed/available hampering service desk agents productivity while booking appointments.
- Rigid security controls that were inflexible and not scalable.
- Lack of proper BI to effectively monitor therapists utilization/productivity.

Solution

Enhanced the existing Field Service Lightning implementation to address the above challenges.

- Custom engine to schedule recurring appointments for therapy sessions.
- Extended the out-of-the-box appointment scheduling mechanism to cater for scheduling group activities involving multiple citizens.
- Setup the field service requirements of the new business line with separate work types, service resources, access controls etc. and operationalized their field service processes with out-of-the-box crew scheduling functionality.

- Migrated citizens financial information into Salesforce with citizen plans, source of funds (NDIS/non-NDIS) and fund adjustments; along with reference to NDIS claims wherever applicable.
- Re-designed the organization security model to address access control requirements based on role, responsibilities and business units to ensure scalability and flexibility.
- Enhanced analytics to measure therapists utilization/ performance and service KPI's.

Benefits

- 14% improved agent productivity with robust scheduling engine.
- Enhanced citizen experience with quick turnaround times on appointment bookings.
- Better decision making with real-time intelligence on service metrics.