

Transforming Field Service Operations by Leveraging the **Salesforce® Ecosystem**

Field Service is a critical functional area for any industry which needs to physically move goods or personnel; essentially involving inventory management, fleet management and managing service/delivery schedules along with its associated billing and accounting functions.

In the age of Innovate-Disrupt-Repeat, Field Service Operations are under accelerated evolution driven by the opportunities enabled by digital, with Field veterans claiming that the real disruption is yet to come.

With this report, we are trying to bring out the detailed insights into how automated and scalable Field Service Management with industry best practices enhances the efficiency of Field Service Operations and contributes towards streamlining the organization's workflows.

Challenges of Field Service Operations

Like any other processes, Field Service operations are also facing the challenges of Operational Silos, Increasing Cost and operational inefficiencies of Legacy Systems, Inefficient/Redundant Tasks, and evolving Customer Expectations.

Challenge#1: Operational Silos Structure

In most industries Field Service exists in silos, not interacting with Marketing or Sales. Despite Field Service being customer-facing yet, organizations lose on opportunities to gain a 360° unified view of the customer.

Without integrating Field Services with other processes, critical information is lost. For example, production teams miss data such as the number of repairs requested in warranty, parts needing frequent replacement, the average time to asset failure, etc.

While Field Service continues to be in silos, the cost is incurred due to overstocking and administrative overhead. Fragmented IT infrastructure maintains status-quo and inhibits communication.

To reduce operational expenses and increase the efficiency of asset management at the warehouse, a unified holistic integration of field service operations and collaboration with other departments is the need of the hour!

Challenge # 2: Rising Cost of Legacy Systems

Many organizations are still using obsolete software of Field Operations based on legacy technologies which are getting costlier to maintain. With the number of experts declining each day and software providers calling off their support, legacy platforms pose a significant risk to data and efficiency of the coupled process.

Obsolete technology stack frequently causes missed communication between teams, data corruption or global service outage, all having the potential to inject inefficiencies that magnify at the next step. Moreover, the lack of mobility in legacy technology decelerates the efficiency of field workforce.

Lacking features like automation, cloud storage, and predictive-analytics; such legacy system cost opportunity to focus on production as they need huge resources to just maintain them.

Field service operations across industries demand solutions based on cutting-edge technology to survive and thrive in the evolving competitive landscape.

Challenge # 3: Recurring Redundant Tasks adding inefficiencies

Two prominently redundant tasks in Field Service Operations are Route Planning and Assigning Field Resource. Route Optimization is critical to cut-delivery time and needs to take into account the fleet availability, weather fluctuations, update in addresses, preferred time window, road closures, etc. Unless planned well, it adds to the fuel cost.

Similarly, the assignment of Field Resource, without considering the skill set required for meeting customer requests, costs additional man-hours. For example, if the deliverable requires installation then a delivery agent capable of installing the item can save on the additional cost.

Unless automated, these redundant recurring manual tasks will allow inefficiencies to creep in the field service operations. Automation is also required to optimize the availability of human resources for core tasks like strategic planning and implementation.

The market landscape is evolving and organizations across industries are now recognizing the criticality of field service solutions to improve the efficiency of field technicians and attain new revenue streams.

How Field Service Management Software Alleviates Challenges of Field Service Operations?

FSM software addresses challenges of Field Services and facilitates every step of the supply chain to be managed with granular visibility. From automation of field operations, collaboration among field service professionals, coordinating changes on the go to instant update in tasks; it acts as a platform to streamline the entire gamut of Field Service Operations.

A cloud-hosted Field Service software bypasses the need to maintain an on-premise server and is updated as per the need. Informational access on mobile devices improves the experience of every stakeholder who can engage the end consumer in innovative ways, establishing customer delight.

With automated scheduling, the productivity of both managers and the technicians is optimized. Real-time and predictive analytics makes monitoring the status of jobs simpler. Field Service Management tool empowers Field Service personnel to be the main contact for customers and establishes trust with the end consumer.

As per a [Markets and Markets](#) Study, by deployment type, the cloud-based field service management solutions are expected to witness a faster growth rate.

Challenge # 4: Evolving Customer Expectations

Logistical success has a rather new and complex metric 'Customer Satisfaction', which depends not just on timely delivery but on previous interactions with the vendor, customer support, and delivery agent. If the interaction is opaque to the next person in the pipeline, it becomes difficult to bring a disenchanted customer back who is ready to defect with a single instance.

Delivering products/services in partnerships with aggregators has added another layer of challenge to vendors. From preferred time-slots, last-minute cancellations, changes in address or request for real-time updates, there are many scenarios where consumer expectations demand every step of the supply chain to communicate with each other.

With competition leveraging technology to get closer to customers every day, leaving the opportunity to collect feedback is unaffordable.



It is critical for organizations across industries to select the right Field Service Management solution out of the pool of options available to them in the market ecosystem. The decision-makers must ensure that the software has capabilities to address their specific business requirements and can help them to gain competitive advantage in an increasingly volatile and competitive market landscape.

This report analyzes the advantages introduced by Optima Pro, a Salesforce-based Field Service Management Software, including but not limited to streamlined process workflows among different departments, skill and bandwidth optimization, capturing revenue-generating opportunities, real-time data access to various stakeholders, data-management, and cost optimization.



Optima Pro: A Comprehensive, Field Service Platform

Optima Pro, Damco's proprietary Field Service Software based on the Salesforce platform, is a comprehensive solution to address the daily challenges of the field service industry and delight the end consumer through a superior experience.

Apart from the core functions of cloud-based FSM software like automated scheduling, real-time visibility into the workflow, and connected workforce; it offers below listed features that can be customized to fit the business needs:

► **Manage the Entire Service Organization**

Built-in process for managing the complete Service Organization which includes territories, teams, and technicians along with their skills, expertise and current location.

► **Proactive Inventory Update**

Request parts on the fly from fellow technicians and depot locations by the appropriate stock search. Geo-location based dispatch for cost-effective and timely service.

► **Track Warranty and Service Contracts**

Built-in process to define the rules to auto check the warranty and service contracts so that the service personnel can be updated on potential revenue opportunities.

► **Transparent Invoice Generation**

Retrieve previous invoices/work orders, generate service bills/invoices, and modify them in real-time. Record details about the work performed and check for previous sessions.

► Delight Consumer by Preventive Maintenance

Pre-configured support for Preventive Maintenance to keep technicians updated for upcoming maintenance services ensuring fewer breakdowns of customer products.

► Seamless Integration with TimeSlate Pro, PostObject Pro and Address Finder

A feature-rich comprehensive apps from Damco that compliment Optima pro with automations and streamlining of business operations for a great user experience

Use Cases

1 Bike Aggregator
Business

2 Consumer Products
Company

3 Medical Equipment
Manufacturer

4 Car Repair Service
Aggregator

1 Bike Aggregator Business

The client is a leading Bike Aggregator in the US, a start-up that has recently raised multi-million dollar investment. The client employs business intelligence along with a peer-network to enable bike sharing across multiple cities.

Business Needs

- ✓ Facilitate communication among fellow riders and corral attendants
- ✓ Enable tracking of bike locations for admins and customer support staff
- ✓ Gain real-time status of bike stock vis-à-vis customer requests
- ✓ Optimize workflows for customer support agents, corral attendants, and riders
- ✓ Automate scheduling management and provide riders the real-time information

The Solution

- ✓ Optima Pro implementation to integrate scheduling policies, global actions, and optimization rules
- ✓ Optima Pro Mobile Application to enable communication with riders and corral agents
- ✓ Provision of scheduling based on real-time weather conditions and prediction of demand surge during special events
- ✓ Chatbot integration for timely resolution of customer queries

2 Consumer Products Company

The client is a multinational conglomerate operating in several business segments, popularly known for electronic home appliances manufacturing and distribution.

Business Needs

- ✓ Facilitate communication among warehouse Supervisor, Dispatcher, and Logistics Executive
- ✓ Enable fleet tracking— purpose of the vehicle (cargo/ passenger), vehicle leasing (internal & external)
- ✓ Optimize workflows for Inventory Manager, Supply-Chain Manager, Airfreight Manager, etc.
- ✓ Automate scheduling management and provide Logistics Coordinator the real-time information

The Solution

- ✓ Optima Pro Implementation to streamline quoting, booking, shipment, tracking, and fulfillment
- ✓ Optima Pro Mobile Application to communicate carrier rating, cargo fill rates, and origin /destination routes
- ✓ Optimization of workflows pertaining to fleet management, warehousing, and port or marine operations
- ✓ Integration of messaging service to ensure collaboration between Mobile Workforce, Managers, and Dispatchers

3 Medical Equipment Manufacturer

The client is a manufacturer and distributor of medical equipment like Cyclotron, CT Scanner, MRI, etc. These equipment require special packaging, carriage, unboxing procedure, and trained personnel along with on-site engineers to supervise the installation.

Business Needs

- ✓ Track inventory— equipment parts, installation material such as steel shielding for installation on site
- ✓ Set operating hours and organize personnel with the right skill sets to conduct installation
- ✓ Schedule availability of specialist engineer for installation and first run of the equipment
- ✓ Ensuring compliance for radioactive equipment through serial accountability of the installation crew

The Solution

- ✓ Implementation of Optima Pro with customized workflow
- Optimization of workflows to provide complete
- ✓ visibility to each stakeholder with detailed log and custom work rules
- Optima Pro Mobile App with knowledge
- ✓ articles for safety on radioactive equipment and installation guide videos
- Push notifications for installation milestones to
- ✓ all stakeholders and admin review for next steps

4 Car Repair Service Aggregator

The client is a start-up providing on-spot car repair and towing service. They employ crowdsourcing of verified mechanics, car cleaners, and towing service providers. They also offer a subscription-based model of services for regular maintenance.

Business Needs

- ✓ Track upcoming appointments, schedule actions, assess resource availability chart and prioritize for emergency requirements
- ✓ Enable collaboration with the rest of the workforce for tapping revenue generation opportunities
- ✓ Track van stock and inventory for upcoming jobs and collaborate with nearby hardware outlets for specific requirements
- ✓ Recognize high performing mechanics and optimize workforce bandwidth for maximum operational efficiency

The Solution

- ✓ Optima Pro implementation along with TimeSlate Pro integration for minimizing time to assign a mechanic/cleaner/tow-vehicle
- ✓ Integration with Salesforce CRM for visibility into customer interaction over various channels to ensure transparency
- ✓ Push notifications for customer and service professional to keep updated on the assignment
- ✓ Report an urgency for immediate dispatch of service personnel through SMS in case of non-availability of internet

About Damco

At Damco, we take pride in building innovative, efficient, and robust IT solutions for our clients. As a leading Salesforce Silver Consulting Partner in the US, our expertise spans Sales Cloud, Marketing Cloud, Service Cloud, Communities, Field Service solutions, Pardot, Lightning Migration and Custom Development, and App Cloud. Apart from OptimaPro, we hold proficiency in implementation and customization of Field Service Lightning – the native Field Service Solution package from Salesforce.

We have been pivotal in building success stories of great customer experience, incremental efficiencies, and ROI transformation. Through our robust consulting methodology developed over the course of numerous successful Salesforce implementations, we help organizations across industries to unlock the Salesforce potential and transform their field force capabilities while remaining cost-effective.

We are a preferred Salesforce Partner for businesses worldwide:

- ▶ Salesforce Silver Consulting Partner, with 30+ Salesforce Consultants and 50+ Implementations and Projects delivered on Salesforce
- ▶ Certified Salesforce professionals skilled in managing a wide range of Salesforce projects, complex integrations, and product implementations
- ▶ Global presence with resource availability in the US, Europe, and India.



For more information about our Salesforce® Ecosystem, please contact us.

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