



ExAM:

Field Services & Inspections



exam4inspections

A background image showing a business meeting. Two people in business attire are seated at a table. One person is using a calculator while the other looks on. There are documents and a pen on the table.

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What is Field Services Management and Inspections?

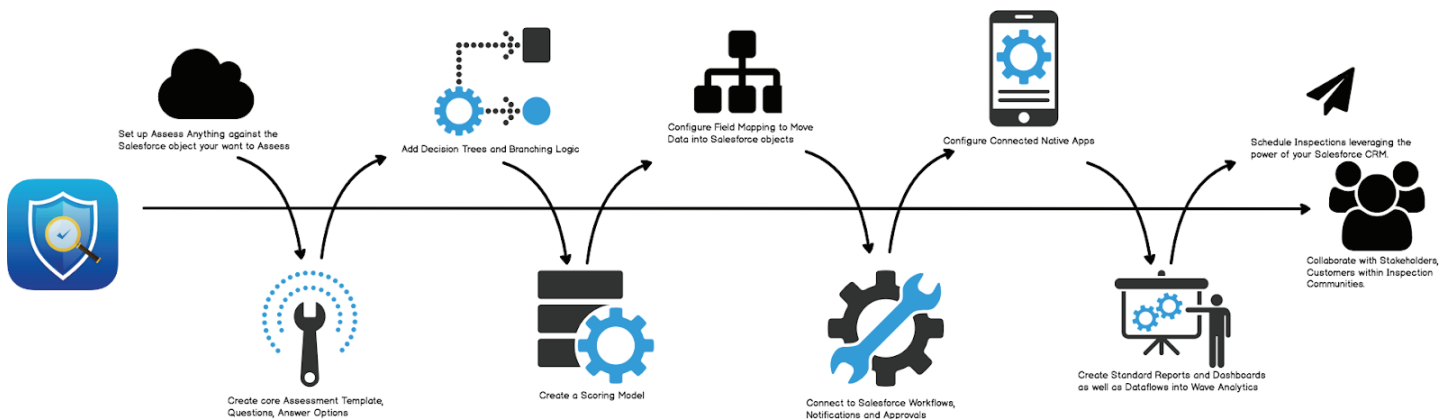
Field Service Management (FSM) is a system for managing end-to-end activities in a field service organization including managing worker activity, scheduling and dispatching work. Field Services are a big part of many inspections use cases and are a necessary component for many companies, particularly those who need to collect information in the field for compliance reasons, inspection purposes, to manage installations, or the service or repairs of systems and/or equipment.

Inspections help organizations ensure compliance of something really important with a standard. Inspections are a huge part of ensuring that the places we visit, transportation we take, houses we live in and hospitals where we receive care are safe and perform at a level deemed to provide a certain standard of performance.

What is ExAM?

ExAM is short for Extensible Assessment Manager. Available on the Salesforce Appexchange, ExAM utilizes the power of the Salesforce platform to provide you with the ability to assess, manage, and interpret information to make critical business decisions.

ExAM provides your organization with all the necessary tools to build assessments, collect information, manage that information, and drive important decision making.



Building an Enterprise Class Inspection

BUILD:

ExAM allows you to build assessment and inspection templates (a grouping of questions you can use for inspections, compliance or any assessment) through the easy to use ExAM Command Console.

ANALYZE:

Once you have distributed the inspections or assignments and information starts to roll in you can monitor the information through the analytics tab of the Command Console. It is here that you can see via charts and graphs related to information you are collecting as well as the progress of your staff in executing the business process.

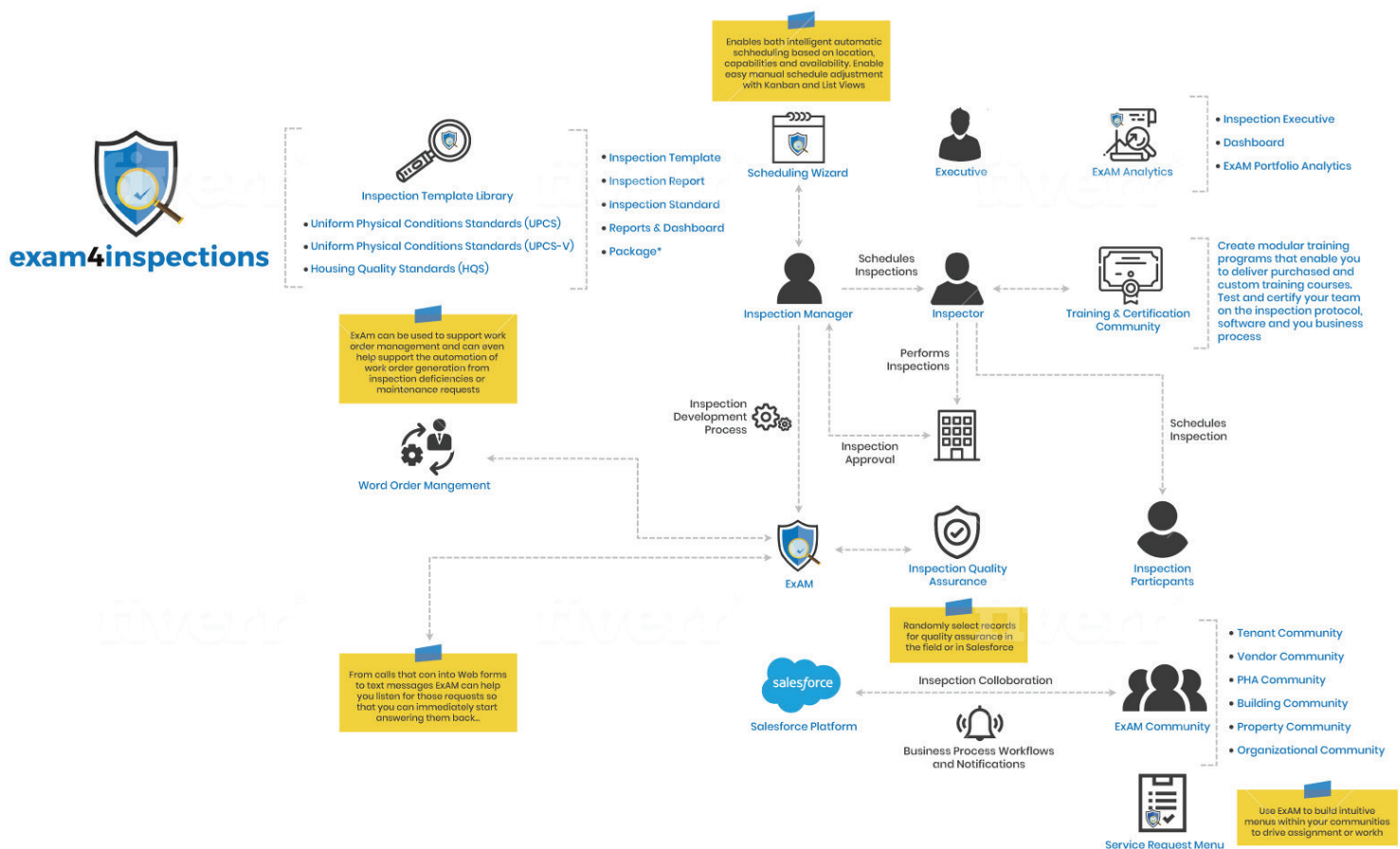
DISTRIBUTE:

After creating the various sections and questions on the assessment template you can distribute the assessment to the desired audience via Salesforce Email or by sending a web link using the distributions tab. You can also use the scheduling wizard to automatically allocate inspections or field services activities in the field. This can even take into account the team members certifications, physical location and availability in order to optimize your business process.

Why ExAM?

That is where ExAM comes in to play! ExAM is a turnkey Enterprise solution that can easily take over many of the work process that you are most likely already executing and consolidate them into a single app. ExAM allows you to use it in a way that best suits your use case or multiple use cases. For example, you can build out a Customer Satisfaction Case Closed survey that allows you to collect information about your interaction with customers during issue resolution. Or you could utilize the tool to execute internal or external training and certification efforts. ExAM acts as a data collection tool allowing you to utilize the powerful native reporting and analytics of Salesforce. The more quality information you have access to the more efficiently you can accomplish the goals set out by your CoE. The only limitation of what you are capable of accomplishing with ExAM is your ability to come up with areas to implement it... but don't worry about that we have been doing this for a while so we can help along the way!

ExAM Touch Points

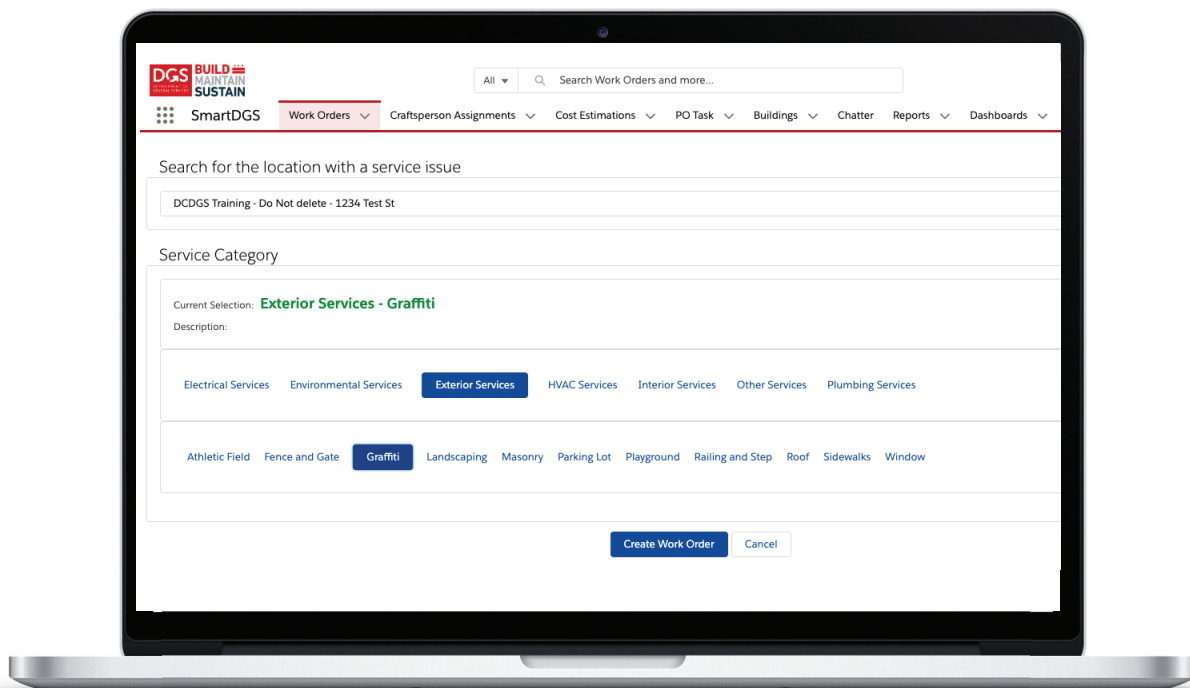


Information, Work Order Management & Service Requests



One of the biggest challenges is gathering information and requests efficiently so that you can execute. Many inspection scenarios begin with a request and almost all maintenance and services start with a request. ExAM makes it easy for your customers and stakeholders to initiate communications with your team across channels. You can also create decision tree driven forms and menus with the ExAM Command Console so that the information you gather from your stakeholders is actionable. From calls that come in to Web Forms to text messages ExAM can help you listen for those requests and even draw the requester through a decision tree so that you have the information you need to take action.

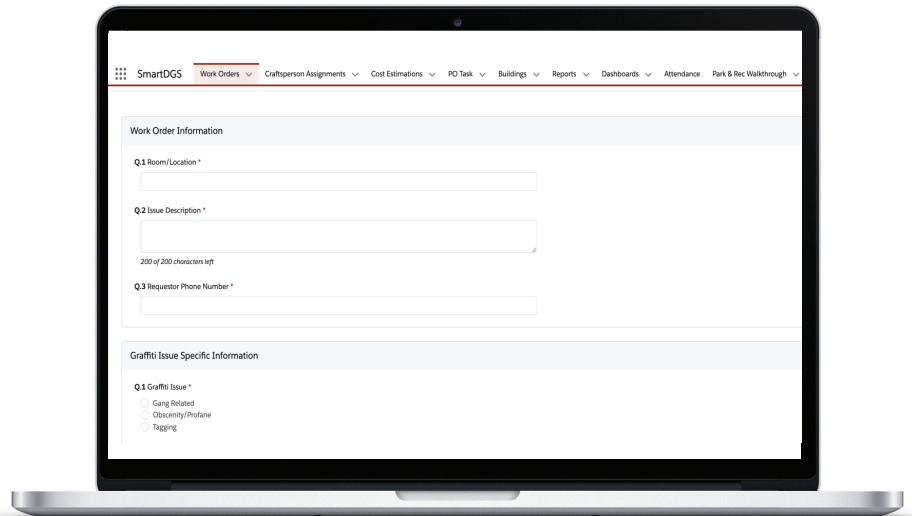
Service Request Menu



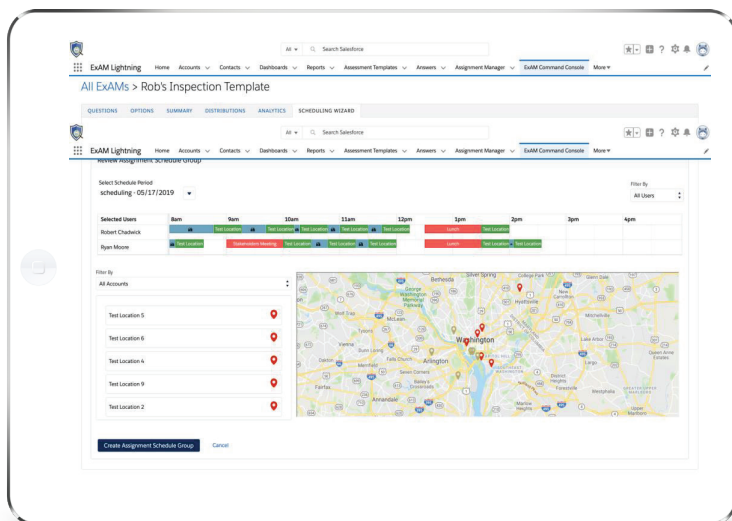
Informational Forms

Utilize ExAM to gather information directly from your stakeholder community and get it into Salesforce and Salesforce Apps, so that you can take action, make decisions and use it within your business process. From basic information about the jobs, property owners, applicants to complex data gathering exercises ExaM helps you get the information you need to inform decisions and support your business processes. ExAM enabled forms can be just about anything you need to get out of someone's head but just to get you thinking about the art of the possible, here are a few examples:

- Web to Case
- Web to Lead
- Registration Forms
- Application Forms
- Work Order Requests
- Data Calls
- Surveys
- Customer Feedback



Scheduling Services



Managing inspections and field services delivery is a complex process that gets increasingly difficult at scale. ExAM helps to mitigate the issues associated with this process by including an inspection scheduling tool that enables the optimization of scheduling, including factors like an inspector's location, capabilities and schedule. You can also utilize the manual capabilities included in ExAM to ease support the scheduling process.

ExAM's Scheduling wizard enables you to quickly create groups of users and locations related to an inspection template. The system can then be used to automatically assign the inspections to the users within the group

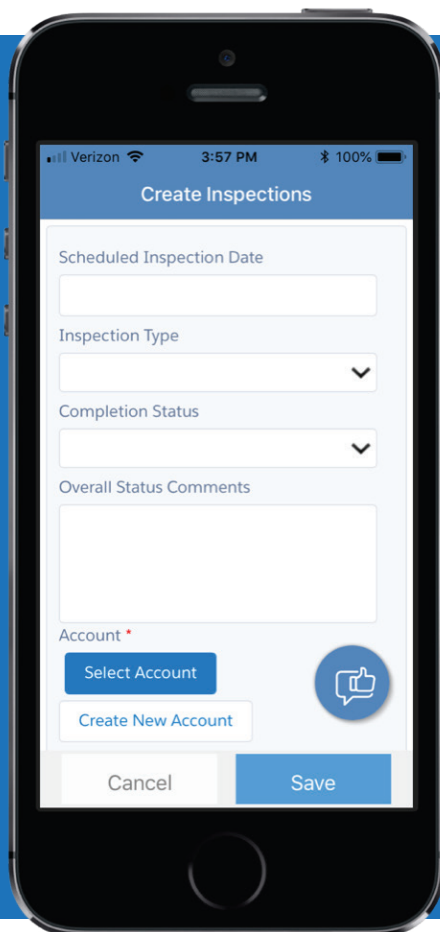
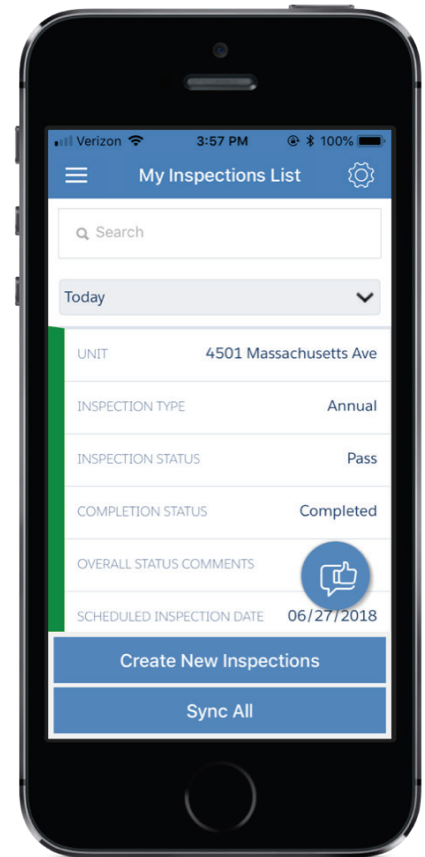
while accounting for drive time, user locations, and blackout times. Pairing this tool with less automated features like the Scheduling Kanban and custom List Views makes scheduling and managing inspections and services easier than ever.

Data Collection in the Field

We know that many services occur in the field and often without access to the internet so ExAM includes awesome mobile applications that are available for both Android and iOS with extensive offline capabilities.

ExAM4Inspections is a fully configurable mobile app built from the ground up to help you gather information and deliver services in the field. The ExAM app is directly tied to your Salesforce Org allowing you to create and modify records.

ExAM enables you to choose from pre scheduling and assigning inspections or allowing your inspectors to create inspections as they go, or a combination of each inspections scheduling method. ExAM4Inspections mobile application simplifies the process of creating, executing, and processing inspections to allow for high efficiency and quality.



Create on the fly

That is where ExAM comes in to play! ExAM is a turnkey Enterprise solution that can easily take over many of the work process that you are most likely already executing and consolidate them into a single app. ExAM allows you to use it in a way that best suits your use case or multiple use cases. For example, you can build out a Customer Satisfaction Case Closed survey that allows you to collect information about your interaction with customers during issue resolution. Or you could utilize the tool to execute internal or external training and certification efforts. ExAM acts as a data collection tool allowing you to utilize the powerful native reporting and analytics of Salesforce. The more quality information you have access to the more efficiently you can accomplish the goals set out by your CoE. The only limitation of what you are capable of accomplishing with ExAM is your ability to come up with areas to implement it... but don't worry about that we have been doing this for a while so we can help along the way!

ExAM Communities



Communities act as a great way to gather and share information with the respective parties. The use of communities can save you valuable time and resources while also providing an enjoyable user experience. ExAM based communities enable you to share information collected via ExAM with other parties, for example if you are using ExAM to support inspections you can share access to tenants, homeowners or facilities management staff via a community.

ExAM communities makes it easy to securely share results, collaborate on work orders, or order services. Think of it as enabling you to create a secure website where you can share just the information you want from your ExAM system directly with your customers. Easily share forms and other information, collaborate in real time and reduce the amount of paper and in person interaction required for your stakeholders to get access to information. This reduces your costs and increases their satisfaction.

Case Management & Stakeholder Feedback

ExAM can help you understand how people feel about the services you are providing, your products and just about anything else you need to know. Collecting and understanding information related to your interactions with stakeholders and how they perceive those interactions is crucial to your ability to evaluate your operations as well as to improve them. Below are several ways that ExAM can be implemented to assist in gathering that information and transforming that information into actionable data.

Case Closed Surveys

ExAM's Case Closed Surveys let you assess how the agents handling calls and tickets with Salesforce Service Cloud are doing. An example of a use case where this might be useful is if a stakeholder has an issue that is resolved using Salesforce's native Case object you could send that customer satisfaction survey upon closure of a case. Check out the use case [here](#)¹!

FIELD	FIELD VALUE	ASSESSMENT TEMPLATE	EMAIL TEMPLATE
Case Type	Question	T-67 (Customer Satisfaction Sur	Case Closed Complex Fun
Priority	High	T-73 (Strategic Partner Survey)	Case Closed Complex Fun
Case Reason	New problem	T-192 (Test Case Closed New Pr	Case Closed Complex Fun
Case Reason	Existing problem	T-193 (Test Case Closed Existing	Case Closed Complex Fun
Case Reason	Complex functionalit	T-194 (Test Case Closed Comple	Case Closed Complex Fun
Case Type	White House Hotline	T-208 (White House Case Mana	Whitehouse Hotline HTML
---None---	---None---	---None---	---None---

Net Promoter Score

Net Promoter Score (NPS) is a management tool that can be used to gauge the loyalty of a firm's customer relationships. Learn how to implement NPS using ExAM so that you can leverage that data to drive valuable business decisions. By asking your customers and stakeholders how likely they are to recommend your service you can get a good gauge of how your execution is perceived by your customers. By asking how you might improve you can get real insight into how you may be able to add value for these stakeholders and improve your scores. Check out the use case [here](#)²!

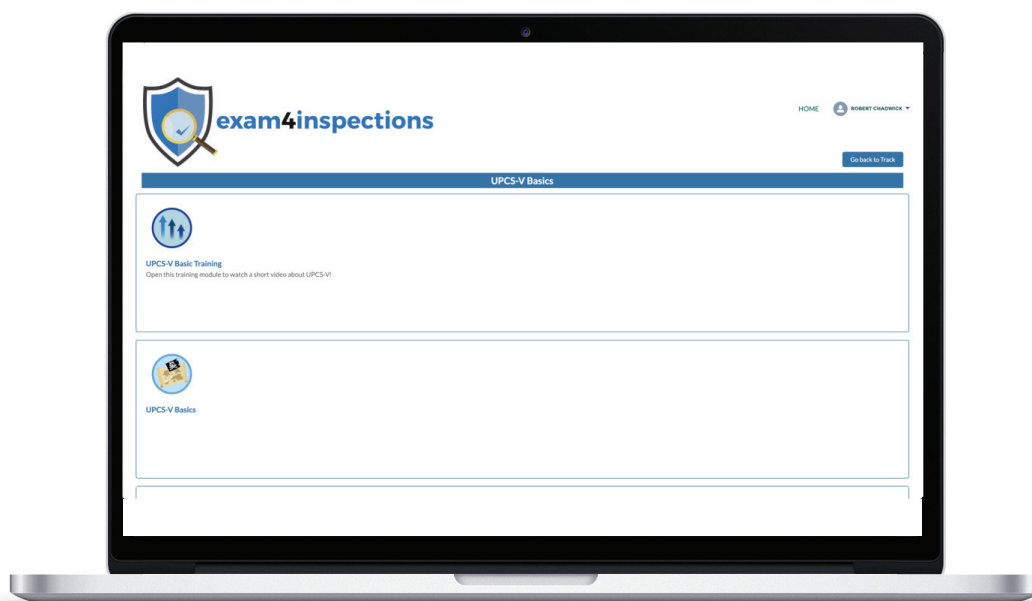
ExAM NPS Score
NPS



[View Report \(NPS\)](#)

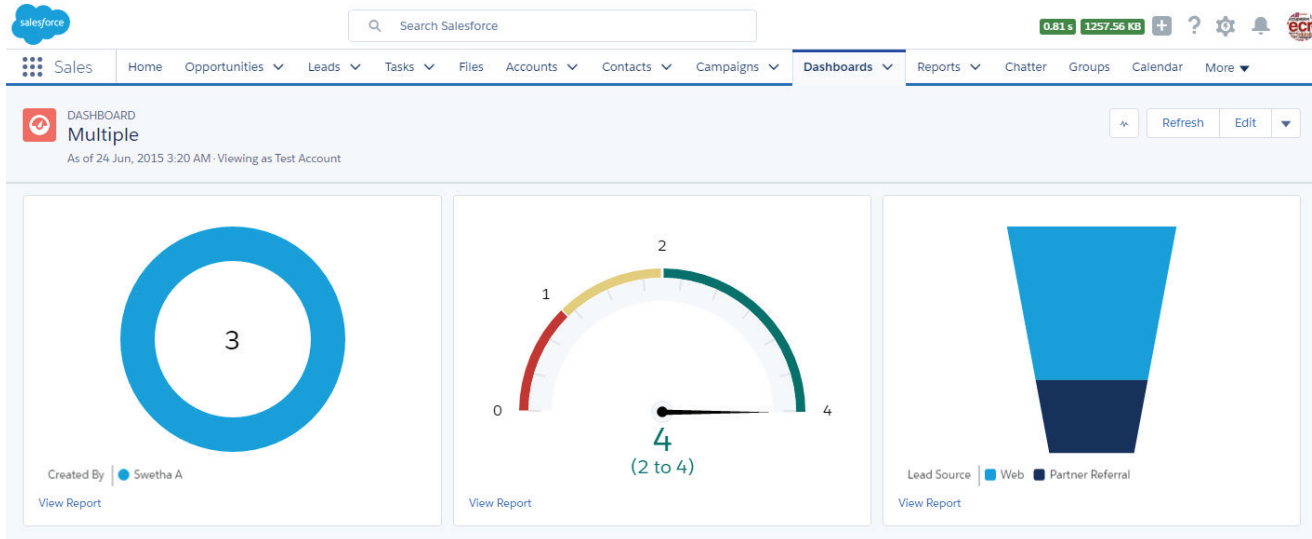
Training & Certifying Inspectors

ExAM can enable you to develop full fledged training and certification programs so that you know the people out in the field know what they are supposed to know. Ensuring that your people have the knowledge that they need is a breeze with ExAM. Just like any other assessment form you can build out a template or a series of templates that are supported by template scoring and distribute them to the appropriate parties for completion. Using ExAM's field mapping capabilities and standard Salesforce functionality you can build out a robust certification object that will hold certification information related to employees. [Check out](#) one way we implemented a Certification System within our internal Org¹.



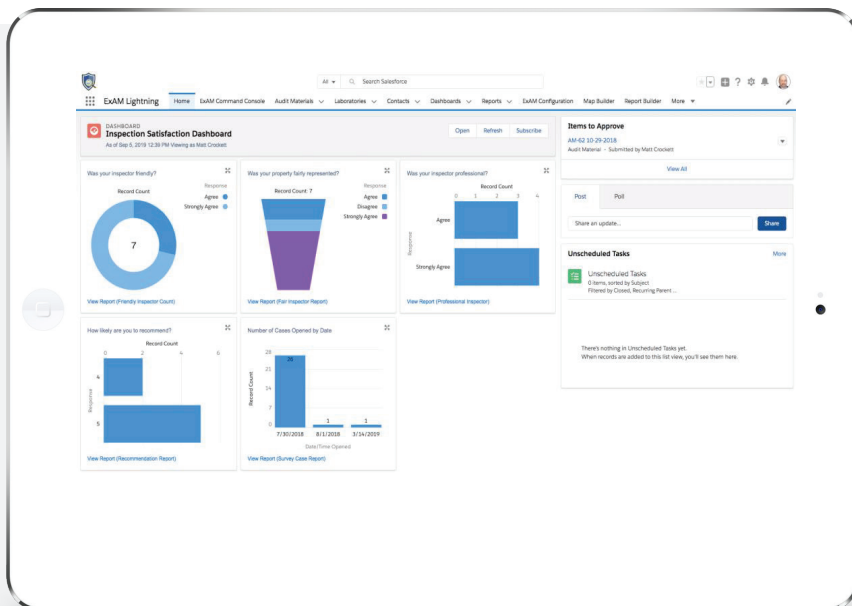
Dashboards & Reports

All this information that you are gathering is great but without the ability to digest it it does not provide much value. Fortunately for you ExAM has canned reporting capabilities on a template level while also seamlessly integrating into Salesforce providing you with the robust reporting and dashboarding capabilities that are native to the platform.



Analytics and Artificial Intelligence

Use powerful analytics tools like Einstein Analytics, Predictions, AI, and Language in conjunction with ExAM, allowing you to easily create data sets from your collected information, construct dynamic and interactive dashboards, and analyze the drivers behind your most important performance metrics.

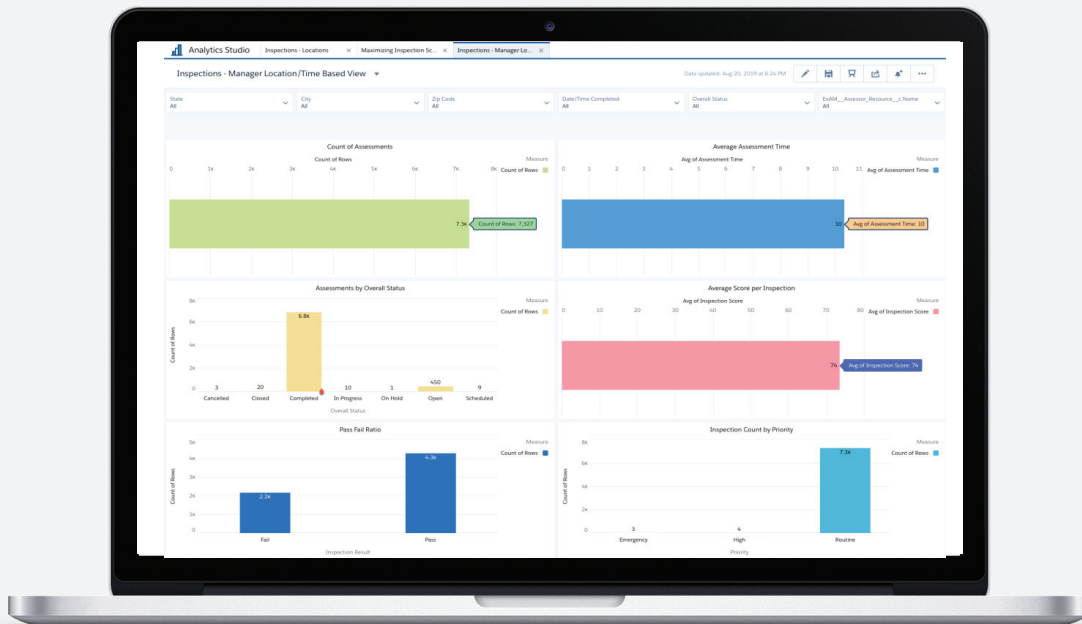


INSPECTOR:

Have access to dashboards via communities or Salesforce home page that allow you to see all of the data in Salesforce that is relevant to your daily tasks and performance.

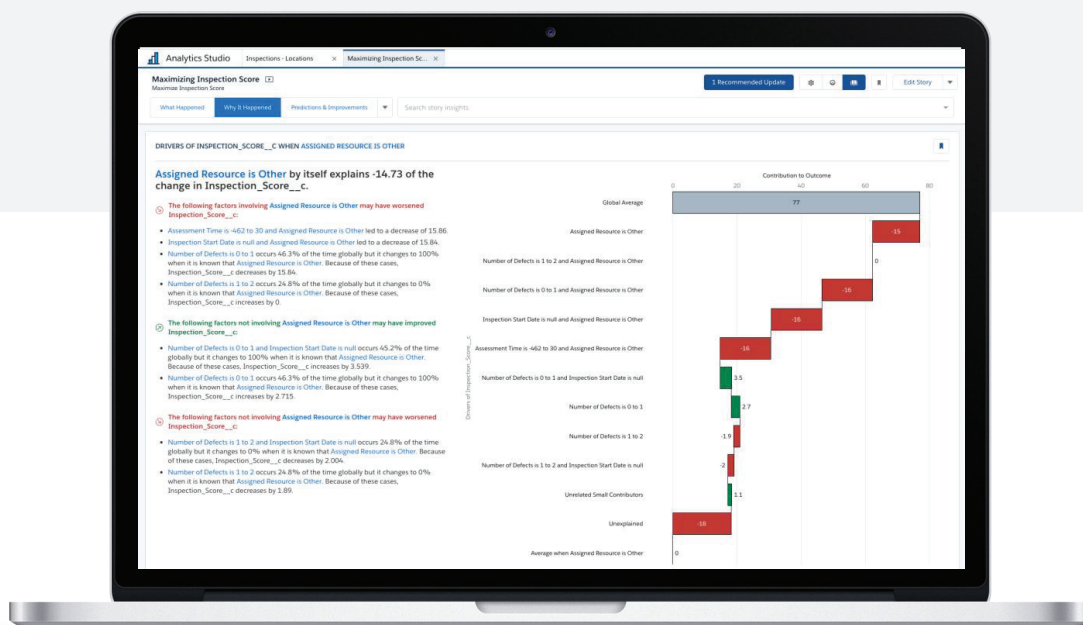
INSPECTION MANAGER:

Use dashboards and Einstein Analytics to determine the effectiveness and success of the inspectors on your team.



PORTFOLIO MANAGER:

Use dashboards and Einstein Predictions to analyze your performance metrics and make critical decisions about your business.



Selling Inspection Services

ExAM is a part of the Salesforce AppExchange and as such it's easy to get licenses for the world's leading Sales CRM. Salesforce's Sales Cloud is an industry leading product. Automate repetitive sales tasks so you can focus on what matters most - growing your business:

- Organize customer information in one place
- Empower sales reps to work faster and sell smarter
- Convert more leads, close more deals
- Understand the health of your entire business at a glance
- The world's #1 CRM



ExAM helps you get the most out of Sales Cloud

Landing Pages & Lead Forms - ExAM helps you quickly and easily build landing pages that enable your customer to learn about you can connect with you.

Sending Email - ExAM enables you to send emails to your leads and contacts including customizable email templates, surveys and forms.

Types of Inspections

UPCS-V
TERMINAL ROOM CLEANING INSPECTION

UPCS HQS
WINDSTORM BUILDING

NSPIRE
PATIENT ROOM DISCHARGE INSPECTION

ENVIRONMENTAL MANAGEMENT SERVICES QUALITY ASSURANCE

EOC ROUNDS
INFECTION CONTROL
EXAM4INSPECTIONS.COM

HAND HYGIENE & PPE OBSERVATION
ADA COMPLIANCE SURVEYS

FIRE EQUIPMENT PROPERTY CONDITION ASSESSMENT

ENVIRONMENTAL RESIDENTIAL MANUFACTURING

COMMERCIAL TERMITE HOME ENERGY AUDIT





MB&A Company Background

Millsapps, Ballinger & Associates (MB&A) is a Salesforce ISV Partner, ISVForce Partner and Consulting Services Partner. The ISV partnership with Salesforce includes our Salesforce AppExchange App product ExAM (Extensible Assessment Manager) which is used to support data collection, evaluation and analysis on the Salesforce platform.

Our staff holds more than numerous Salesforce certifications and our team includes Salesforce certified Application Architects and Salesforce certified System Architects. Our team has supported hundreds of Salesforce implementation projects including more than 75 Salesforce projects for Federal, State and Local customers.

MB&A's customers have run the gamut of size and complexity including¹:



¹This is a representative listing of MB&A customers.