



# ROTO-ROOTER MODERNIZES OPERATIONS WITH SALESFORCE FIELD SERVICE

Integrating modern technologies to better identify customer service opportunities.

## About the Client

Founded in 1935, Roto-Rooter is the largest provider of plumbing, drain cleaning, and water cleanup services in North America. Roto-Rooter operates businesses in more than 100 company-owned branch and independent contractor territories and approximately 400 independent franchise operations. The company has about 1,400 service technicians with territories covering 90% of the United States.

## Challenge

Customer service representatives, dispatchers, and technicians must operate seamlessly in order to provide top-notch customer service and fast service ticket resolution to Roto-Rooter's national customer base. This requires integrated, modern technologies with functionality that enables representatives to quickly identify service opportunities and route technicians, especially in competitive markets.

Roto-Rooter maintained long-standing technologies built and updated through the years, including its primary front-end and back-end system built in AS400. This enabled Roto-Rooter to build operational efficiency and generate a competitive advantage. But aging legacy systems proved difficult and costly to maintain and lacked the modern functionalities and user interface required to provide the best experience to users and improve customer response times.

## How PK Helped

In partnership with Sikich, PK worked with Roto-Rooter to quickly identify the appropriate cloud-based platform, Salesforce Field Service, to take Roto-Rooter into the next generation of technology. Salesforce Field Service is designed specifically for Field Service Management teams to ensure businesses can meet rising customer expectations in a unique and challenging operational environment.

Among the benefits Roto-Rooter sought:

- Improved technician efficiency, including utilization, standby percentage, and increased on-time arrival
- Enhanced customer experience, including decreased call backs and transfers
- Streamlined processes for high-priority customer SLAs

As one of the largest field service providers in the country, Roto-Rooter had highly specific

The new Field Service solution was built to integrate with existing Sales Cloud and Web-to-Case functionality, in addition to greatly enhancing operational efficiencies among dispatchers, customer service representatives, and technicians.

Among those areas of customization in the overall FS solution:

- Integrate Salesforce Field Service with existing mobile solution to enable real-time communication with the AS400 back-end system
- Enable dispatchers to manage technician schedules, including personal time, lunch and overtime
- Automatically create tickets for additional services based on Work Order inputs
- Enable customer service representatives to easily convert a Case to a Work Order
- Enable customer service representatives to automatically create a new Account from a Work Order
- Enable customer service to assess response times by service area and service type, then book appointments based on integrated data with AS400 back-end system; also enable representatives to force appointments manually when necessary
- Trigger notifications to customer service for customer "Comfort Calls" when necessary based on real-time technician response times and next appointment times
- Enable dispatchers to manage technicians and jobs on a custom dashboard and GANTT chart with custom visuals

- Enable dispatchers to select one or more technicians or branches to send text notifications
- Enable dispatchers and customer service representatives to easily see service appointments based on the customer timezone
- Enable customer service to verify service areas based on customer inquiries
- Implementation of Omni Channel for Cases to increase efficiency for internal Customer Service Users.

## Results

The solution went live with three pilot branches in early September. The integrated solution combines the familiarity of the old application, mobile GPS tracking of Roto-Rooter's technicians, and workflows with a new modern interface and enhanced functionality. The Roto-Rooter team can now also take advantage of three new releases a year with Salesforce Field Service, to continue building on its successes and accomplish corporate goals.

