



An At-Home Dream Sales Appointment

How we significantly shortened the time from Lead Creation to Deal Closure

Success Indicators

SIGNIFICANTLY REDUCED TIME

Lead Creation to Deal Closure

90 MINUTES

Full-Circle Sales Appointment



About Floor Coverings International

Floor Coverings International (FCI) is North America's leading in-home design floor coverings brand, with a sprawling franchise operation all over U.S and Canada.



Reasons for Approaching Asperii

Prior to contacting Asperii, FCI used a legacy FSM system with no CRM integration that wasn't able to support the growing number of Design Associates working from more than 150 franchises across the U.S and Canada. FCI looked for a single platform that will consolidate its entire operation – sales, CRM, billing, call center, and on-site contract completion.

Additionally, FCI had two specific goals: First, to significantly shorten the time from when a lead is created in the system to when a Design Associate is making a home visit by allowing easy and convenient appointment scheduling independently by customers and internally by the call center and the design associates. Second, to allow Design Associates to complete a full circle sales appointment at the home of the customer – taking measurements, sketching the floorplan, suggesting different materials to customers, drafting a price quote, and signing a contract.



Project Intel

Scope: End-to-End Implementation

Focus: Scheduling

End Customer: Domestic

Industry: Property Services

Solution: Salesforce Field Service Lightning, Call Center

Development: Standalone Tablet App



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The Need



Full integration of sales, CRM, billing, and call center



Ability to schedule appointments independently by customers, and internally by both call center and design associates



Ability for field associates to do on-site measurements, produce a price quote and sign contract



A system capable of scaling to support the continuous growth of the company



What We Did for FCI

To enable the full cross-company integration of systems that FCI needed, Asperii utilized Salesforce's Marketing Cloud, Sales Cloud, Service Cloud, and its Mobile platform to achieve a seamless Lead Creation to Deal Closure flow.

We utilized Field Service Lightning as the core scheduling engine and customized it to operate GANTT-less, meaning, with no dispatcher. We configured the system to allow multiple entities to schedule appointments directly with a franchise-specific calendar view; customers via the website, call center and Design Associates directly. We've included a two-way synchronization of Field Service Lightning with Desing Associates Outlook to block appointment slots made on either side.

The Tablet App carried by Desing Associates (see Development Spotlight) was fully integrated with Field Service Lightning's database for inventory availability, taking Before & After photos, communication via Chatter and navigation to customer's home.



How Floor Coverings International Works After Asperii

- Significantly reduced time from Lead Creation to Deal Closure – from weeks to days
- A full-circle on-site sales appointments achieved in less than two hours – consultation, measurement, sketching of floor plan, providing a price quote with a few options for various materials, final contract creation, and deal signing
- Design Associates are able to act independently while 'in the field' – generate leads (by being referenced to neighbors for example), schedule appointments, amend quotes and provide alternatives



Development Spotlight

Asperii designed and developed for FCI a custom Tablet App to be carried by Desing Associates that allows them to 'sketch' a floorplan by inputting measurements, then layering the floorplan with different materials to produce exact price quotes – on the spot – for the various materials. Last, based on the customer's choice, the creation of a final contract to be signed directly on the tablet.

"Our goal is to take up as little of our customer's time while offering the best possible value. We needed a solution that supports this and as we continue to grow would also scale easily. Thanks to Asperii, we got just that."

Ryan Aschauer
Vice President of IT/BI



- Full synchronization of all parties – customers, Design Associates, call center – actions on the platform
- Customers can schedule appointments directly on FCI's website via a franchise-specific calendar view
- Call center can schedule appointments for any franchise

