

CHALLENGE

- Customer previously implemented Field Service with a different company, but it was a failed implementation
- Trainers had different specialties and some were travelling far more than necessary. This was difficult for project managers to track and coordinate.
- Field Service team was using three siloed systems for communication, but this was confusing and difficult to track
- Wanted to automatically create quote documents

RESULTS

LSCI contemplated if Field Service was the right solution for their needs. Uptima helped LSCI make use of their Salesforce investment:

- Reduced manual work and email searching through automated processes with DocGen
- Optimized schedules while reducing travel time for trainers and associated costs
- Case management allowed for levels of escalation for unanswered questions, improving workload accountability and customer satisfaction

SOLUTION

Uptima is implementing Salesforce Field Service and DocuSign Gen for Salesforce to meet LSCI requirements:

- Streamlined service territories to optimize training assignments by location, skillset, and certifications
- Simplified booking process for dispatch from a multi-source approach to a 4-click process
- DocuSign implementation allowed for quote generation directly from opportunities, saving employee time and ensuring accuracy
- Due to coming in under budget and ahead of schedule, case management was also implemented to improve customer inquiries to a group inbox

We hired Uptima to implement Field Service Lightning (FSL), but in the end they helped with that and much more, all under budget and on time. After we finished the initial work on FSL, we had budget left over to get started with case management on service cloud. We are very, very excited to reduce our massive daily e-mail intake. It would not be without their guidance that we would be able to greatly reduce our admin time by simplifying processes and removing duplicated efforts. I highly recommend Uptima!

MATT LANCASTER
Director of Sales



CLIENT

Lancaster Safety Consulting, Inc. (LSCI) is a nationwide OSHA consulting firm that focuses on keeping employees safe on the job. LSCI is a family owned business since 2004 with their top goal set at helping employees all over the United States return home safely each day.

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