Salesforce Field Service for Roadside Assistance

An Asperii Perspective

Overview

With the growing number of electric vehicles hitting the road these days, companies within the Roadside Assistance industry are having to adapt to ensure the highest level of customer service for their members. While they may start by asking questions like, "Do we have the right equipment on our trucks?" or "Do our drivers have the right skills?" the evaluation goes much deeper than that with questions like, "Do we have the right technology to best support our members"?

At Asperii, we aim to help answer that question through our time spent studying the factors that create a great user experience for Roadside Assistance, utilizing Salesforce Field Service, one of the industry–leading Field Service solutions on the market today. Streamlining the process from request to dispatch to assistance for employees and subcontractors creates unique challenges. With several projects directly related to this application under our belt, at Asperii we are confident that we have the technical knowledge and industry insight to deliver a best–in–class Roadside Assistance Solution built on the Salesforce Field Service platform.

Aside from organization–specific requirements, we have identified 8 core areas of functionality that are critical to successful Salesforce Field Service implementation within the Roadside Assistance industry:

1 Quickly and Accurately Locate a Member

We have discovered through our experience that members break down at locations that aren't always tied directly to a street address; In fact, our research shows that this happens regularly. We also understand that not only is it important to intake a member quickly to improve their experience, but it can often be a safety concern as well. The goal is to get a member serviced and back on the road as quickly as possible. With the utilization of Latitude and Longitude values, we at Asperii can design a streamlined, easy–to–use system that will allow your member intake to transact quickly and get a technician on–site ASAP.

2 Prioritize Call Dispatch with Ease

Keeping with the theme of ensuring a best–in–class member experience and safety as our top priorities, we understand that not all calls are created equal. Roadside Assistance entails servicing a myriad of different requests, from changing a flat tire, quickly unlocking a hot car with a small child or animal inside, or simply towing a vehicle from an unsafe location. Using defined logic to assign applicable priorities to the various types of work coming in, Asperii can ensure a smooth intake process by automatically assigning the relevant priority to each call, directly impacting the order in which calls are scheduled.

3 Provide Accurate Arrival Windows with Near Real-Time Routing

Another key component that differentiates Roadside Assistance from other use cases is the need to route trucks from a constantly changing location. Asperii understands that, in an ideal world, calls come in at a pace that allows for trucks to be routed directly from a garage, tow lot, or a previous call. Unfortunately, this isn't the case as there is no way to predict when the next call will come in. The truck may be in motion, or a significant amount of time may have passed since completing the previous call, meaning that the last call's location is no longer relevant for routing.

At Asperii, we have developed a dynamic system that will collect the near real–time location of the trucks and reflect that directly from within the dispatcher's view, enabling:

1. A more accurate arrival window estimation for the member in need of assistance.

2. A more accurate identification of the right truck, based on the near real–time proximity to the call as well as other configured business–specific criteria.

4 Differentiate Work Types (Single-Stop vs. Multi-Stop Jobs)

As mentioned previously, at Asperii we understand the diverse and unique requirements of calls within the Roadside Assistance space. With that in mind, it is important from a scheduling and arrival estimate perspective for intake to indicate to the system when a call will require a single stop or multiple stops. The difference between those two scenarios is something like a tire change (single stop), a tow (pick up/drop off), or even sending two trucks to a single call to ensure proper safety precautions are being taken. Salesforce Field Service has built–in functionality to intelligently schedule across those scenarios and ensure that availability is updated accordingly on the Dispatch Console.

5 Empower Your Field Technicians with a Mobile Application

Two industry requirements come to mind when we think about the need to empower truck drivers with a mobile application:

1. Upon arrival, there are often internal operational and/or safety protocols that need to be completed before, during, and after a service call. Asperii, utilizing Salesforce Field Service, empowers your company to create work plans tied to their specific work types for your truck drivers to complete as part of taking a call. This empowers the truck driver to provide information back to Dispatch in real–time and can reduce the time filling out paperwork for both the member and the truck driver.

2. Calls coming in can often be unpredictable and can significantly vary in terms of the level of severity. Once a truck driver arrives on site it may not always be possible to log their status or even to make it a priority due to the need to help the member get back on the road as fast as possible. Asperii leverages Field Service automation technology to update the status of a call based on the truck's proximity to the member's location and updates the status of a call as the truck leaves that proximity as it heads to the next call. Using this automated technology saves the truck driver valuable time, allows them to focus all their energy on the member on–site, and provides accurate visibility to Dispatch on the progress of calls in the field.

6   Give Members the Real-Time Insight They Want

There's never an ideal time to require roadside service and this can often happen to a member at the most inconvenient of times. We understand that it's important for a member to not only receive an accurate arrival window but to be kept informed of the real-time status of a truck so that they can plan their schedule accordingly. Utilizing built-in functionality on the Salesforce Field Service platform, Asperii can create a seamless Member experience that allows them to get notified when their assigned truck is en route when the truck is within a certain radius of their location – with a visual map that monitors the overall progress of the truck as it heads their way.

7   Manage Your Contractors with Ease

Asperii understands that although it is critical to have a system that can manage an internal fleet of trucks, it is equally important to have a system that can manage third-party contractors just as easily. We also understand the need to empower contractors with the tools necessary to self-manage their trucks while keeping up with access and security protocols set by your company. We bring vast experience implementing Salesforce Field Service systems, allowing you to allocate contractors directly to calls as well as providing a portal for your contractors to self-manage their calls and assignments. All while ensuring that the contractors themselves only see information relevant to them and not additional third-party contracting companies that also support the business.

8   Optimize Your Dispatch Schedule as Quickly as Exceptions Happen

At Asperii we understand that sometimes life happens. Even with a large fleet, variety of truck and/or driver skill sets, variety of call types, and large call volumes, it can quickly become difficult to manually manage a complex schedule when exceptions occur. We have experience tapping into the powerful Optimization Engine within Salesforce Field Service to empower Dispatch to quickly, intelligently, and automatically reevaluate the schedule to identify opportunities to create a more efficient schedule throughout the day. This helps minimize white space, increase overall utilization, and ensure calls are prioritized/dispatched according to the most impactful business objectives.

Each of the components outlined above is critical to providing a successful Salesforce Field Service implementation within the Roadside Assistance Industry. At Asperii, we also understand that each of these components is just one piece of the puzzle that ultimately needs to be configured to work in harmony to provide a successful project. One that creates a positive journey for members, dispatchers, truck drivers, and contractors while simultaneously meeting your organization's goals and KPIs.

To find out more about how Asperii can help you optimize your Roadside Assistance experience

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