



# Seamless FSL Integration and Scheduling & Pricing System Optimization

How we optimized Field Service Operations for the Retail Industry



## Project Intel

<b>Scope:</b>	<b>End-to-End Implementation and Customization</b>
<b>Focus:</b>	<b>Smart Scheduling and Work Order Management</b>
<b>End Customer:</b>	Domestic / Commercial
<b>Industry:</b>	Retail
<b>Solution:</b>	Salesforce Field Service Lightning Customization



## Company Overview

An American retail chain that provides best-in-class pet-care products and services. The company's wide range of services includes dog grooming and training, cat and dog boarding facilities, and daycare delivered by associates at over 1500 branches nationwide.



## Reasons for Approaching Asperii

The company was looking for a robust infrastructure system that could scale with its specific scheduling needs and incorporate a range of other customer-facing functions, including pricing. Asperii was approached to build a comprehensive, customized, and cost-effective solution on Salesforce, customized to meet the needs of its associates and customers, and intuitive enough to enable them to achieve their goals in as few clicks as possible.



## The Need



Create a robust scheduling and pricing system to support 100,000 concurrent users, which includes the company's 20,000 associates, call center employees and end customers.



Ensure the pricing mechanism would be agile and configurable to support price changes, seasonal discounts, and coupons in the most efficient way, and accommodate the thousands of SKUs involved in making appointments for the full range of services and products.



Create a highly customized, fully branded employee-facing user interface that would be easy for internal users to learn to use.



Integrate FSL with existing back-end systems, including SAP ERP, through an APIM hub created by the company, making it possible to completely integrate scheduling and pricing with customer data; expose the scheduling API to a customer self-scheduling UI.



## The Solution - What We Did

### Our Solution Components Include:

- Custom UI
- Backend Development and Configuration
- Front-End applications
- System Integrations with Multiple Endpoints

Before implementing Salesforce Field Service, the company collaborated with Asperii to customize the platform in a co-development project based on the company's detailed requirements and scope.

Asperii then created a custom-built UI, together with the necessary backend infrastructure development and configuration on top of FSL, that incorporated the following elements:

### 1. Customer and employee-facing appointment booking

- Different UI 'flavors' for call center, managers, employees
- Price management to account for special offers and seasonal discounts
- Quote and invoice creation
- Commission calculation
- Quick pin login
- Service qualifications (pet characteristics such as weight, breed, age, etc.)
- Service eligibility (in terms of immunization status, PetSmart history, e.g., are they are known to be aggressive? did the owner fail to pay?)



- Customized customer scheduling rules
- Customer notifications via text and email

## 2. Associate management

- Associate scheduling parameters (concurrency, skills, experience, competency to handle a certain dog weight)
- Availability (days/ hours of work) while considering complex availability scenarios like shift-based scheduling, relocation, and breaks

## 3. Administration models (for admins to access the system)

- Service qualification
- Price management

Asperii also built multiple front-end applications from scratch for use by different users, accessible both via an associate web UI through a web browser and a mobile UI via a dedicated mobile application running on Apple tablets.

Finally, Asperii carried out system integrations with multiple existing the company's endpoints, including:

- end customer Web UI, accessible through the website;

- end customer Mobile UI, accessible through the mobile application; and

- additional back end systems

In the first 6-month rollout phase, the system had been implemented across the company's grooming services, which accounts for 80% of the company's revenues. During this phase, Asperii continued to implement enhancements as it prepares to embark on the design for the company's pet hotel and dog training business lines. Once completed, all three business lines, with their different needs, will be covered by one, unified system.



## Customization Spotlight

Asperii built custom UI and multiple front-end applications for the company. Moreover, we integrated Field Service Lightning with existing systems to deliver personalized and smarter customer service. The scheduling and pricing system was customized to assist field service workers with intelligent scheduling to manage concurrent booking, price changes, seasonal discounts, and coupons seamlessly.



## Results: How the Client Works After Asperii

- The robust Salesforce infrastructure allows for a smoother day-to-day operation with fewer operational disruptions
- The adaptability and flexibility of the system enables it to reconfigure on a per-need basis, permitting consistent growth of the business
- Efficiency of customer service and customer interactions has greatly improved thanks to the custom customer-scheduling module and UI
- Resource utilization has significantly improved in light of the concurrent scheduling capability
- Easily extract data from Salesforce for reporting in a data warehouse with a single unified system, and seamlessly carry out extensive operational and non-operational reports