



The trusted Salesforce developer and consultant for businesses who want to **get it right.**

Field Service Lightning

Transforming Scheduling, Dispatch & Service for a leading disaster response and construction firm



EPIC.

Inovi Solutions has worked closely with one of Atlanta's leading emergency response and construction firms for more than five years. We migrated the company to Salesforce, and continue to support their ongoing development needs.

In the past, EPIC had been using a complex blend of phone trees, spreadsheets, dry erase boards, pen and paper to handle incoming calls, dispatch, crew scheduling, equipment allocation and service.

That system was manual, time-consuming and inefficient.

We determined that there was a better way: Salesforce Field Service Lightning.

Inovi worked closely with EPIC's senior leadership team to understand their daily pain points, technology requirements, use cases, opportunities for automation, and future needs to support the company's long-term strategic business goals.

Our team of dedicated Certified Salesforce Consultants created a customized FSL application for EPIC that allows the company to automate all core functions of the service side of their business.

From incoming calls to crew scheduling, dispatch, field service, equipment allocation, equipment assignments for individual job sites, logistics, maintenance and more, EPIC is now fully automated through a custom FSL app that is configured to match their exact operational needs.

EPIC needed to automate manual processes for incoming calls, dispatch, crew scheduling, equipment allocation and field service operations.





**THE
CHALLENGE:
CONVERT TO
FSL WITHOUT
INTERRUPTING
SERVICE**

We began EPIC's Field Service Lightning project by identifying internal project owners in each major department that would be impacted by the change.

Those people became our internal champions and volunteered their time for discovery meetings, scoping out technology requirements, developing and refining use cases, beta testing and launch. They provided valuable feedback along the way, helped ensure a smooth rollout, and advocated for adoption among colleagues.

Inovi's team approached this project with a hybrid Waterfall and Agile strategy to capture the benefits of both philosophies. While we conducted deep discovery and diagnostics sessions upfront to ensure our custom FSL solution would address the pain points and meet the needs of the business, we managed the project with a nimble mindset so we could pivot and address new needs and use cases that emerged along the way.

Our dedicated team of Certified Salesforce Consultants spent months configuring and writing custom code for EPIC's FSL conversion, with frequent sandbox testing before we took the environment live.

We also supported EPIC employees in change management, onboarding and training.

Inovi created a custom FSL application for EPIC that solved their pain points and fully automated their entire service operation.





EPIC's entire operation is completely transformed because of the custom FSL solution Inovi created.

Incoming calls and new service requests are automatically logged and matched with crew schedules and availability, and dispatch now happens instantly based on a prioritized rotation of "on call" crews and the capacity of each team to take on new jobs.

Equipment is seamlessly tracked and assigned to individual job sites, with automated maintenance records to ensure reliability and minimize downtime.

FSL enables the company to give customers updates when crews are en route, with an estimated time of arrival function that allows clients to do better planning and preparation of their own.

EPIC's FSL app is integrated with its Customer Contact Center and Live Agent chat to empower staff to respond more quickly to every query.

Inovi Solutions has been supporting EPIC for more than six years on all of its Salesforce development needs. Our custom FSL solution has transformed the company's entire service operation.