

# Optimizing Field Services

## Nationwide Propane Company



### Challenge

A top propane company focused on modernizing operations and started an initiative to digitize their field services operations.

- With over 100 locations nationwide, the company's rapid expansion created complexity.
- The company needed to automate business processes and reduce dependencies on hard copy forms.

Salesforce Field Services was an ideal solution, but the client needed assistance from a partner to lead the implementation.



### Solution

TEKsystems Global Services worked in partnership with the client to integrate Field Services with the existing enterprise resource planning system.

- Developed a fully customized work order and dispatch process.
- Created automated forms for service inspection and delivery.
- Enabled real-time customer signature, PDF delivery, and confirmation of work.
- Implemented SMS texting capabilities for technician updates.

Throughout the engagement, we met with the client on a regular basis to discuss status and share ideas.

### Results

TEKsystems Global Services provided the client with a comprehensive solution to optimize field services operations.

- Developed a minimum viable product as a pilot for two regions.
- Recommended other features to enhance the solution.
- Automated additional forms to increase efficiency.

We continue to collaborate with the client to plan and execute the rollout to additional regions and deliver more features, following a phased approach.

Our team optimized field services to **enable the client's future growth.**