



Customer Story 7

Streamlining Operations for a Major In-Home Physician Services Provider with Salesforce Field Service: 50% Reduction in Scheduling Time, Data Consistency, System Consolidation, and Real-Time KPI Dashboards

Challenge

A major provider of in-home physician services faced operational inefficiencies due to fragmented scheduling systems, manual time zone calculations, and lack of integration between their existing system, Persivia, and Salesforce.

Solution

We introduced Salesforce Field Service to centralize the appointment booking process, reducing it from a 10-step to a single-step process. A bi-directional sync was established between Persivia and Salesforce to ensure data consistency. Specialized portals for patients and providers were launched, and real-time KPI dashboards were implemented for business operation teams.

Outcomes

50%
reduction in appointment scheduling time

Achieved data consistency across platforms

Consolidated from three systems into one with Salesforce

Real-time KPI dashboards implemented

Positive feedback from stakeholders during the HyperCare phase