



Customer Story 5

Scaling Field Service Operations for a Leading Medical Device Organization with Salesforce Field Service: Improved Scheduling, Reduced Leakage, Robust Data Reporting, and Enhanced Scalability

Challenge

A leading medical device manufacturer needed to scale their field service operations, moving away from inefficient Excel-based scheduling. Their current ServiceMax Field Service system lacked scalability and created ineffective reporting.

Solution

We reviewed the current organization and ServiceMax implementation, documented object and field mapping, and migrated data and necessary logic from existing systems. Enhancements were made to page layouts, case management, entitlements, and other business processes. Salesforce Field Service was implemented with unified processes for scheduling, entitlements tracking, and accurate data reporting.

Outcomes

Improved scheduling management, with field service teams able to view and manage individual schedules on demand

Entitlements tracked within Salesforce, reducing leakage

Robust and complete data reporting capabilities

Scalability to support fast growth within the service team