

Accelerating Field Service

Energy Company

Challenge

The customer, a large propane company, launched a digitization initiative to modernize sales, marketing, and field service operations. Legacy tools made it difficult to manage leads, automate work orders, and measure campaign success. The lack of visibility and automation slowed customer acquisition and hindered the ability to scale.

Solution

TEKsystems Global Services assembled a high-performing hybrid team to lead end-to-end Salesforce automation. Key solution components included:

- Implemented Salesforce Service Cloud and Field Service Lightning to digitize field operations, automate work orders, and enable paperless, tablet-based processes for technicians.
- Launched Marketing Cloud for online lead generation, automated campaign workflows, and branded email/SMS communications to improve customer engagement.
- Delivered custom training and enablement, empowering the customer's staff to independently build new journeys and templates for personalized marketing.
- Utilized a hybrid and nearshore delivery model to accelerate project velocity, optimize costs, and support nationwide rollout.

Results

- Automated sales lead management improved lead response time by 40%.
- Branded email templates boosted campaign consistency and increased open rates by 25%.
- Automated email journeys led to a 30% improvement in lead nurturing and follow-up.
- Enabled a nationwide rollout of paperless field service and marketing automation.
- Revenue Impact: \$110,380 for initial campaign build; \$831,800 for expanded digital services; \$112,040 for nearshore support.

Achieved high-velocity execution

—translating into faster deployment cycles, improved responsiveness, and sustained momentum throughout the engagement.