

# Salesforce Service Cloud Based Field Service Platform for Senior Care Support Services (Non-Medical)



Public Sector



Salesforce Service Cloud + Field Service Lightning



US



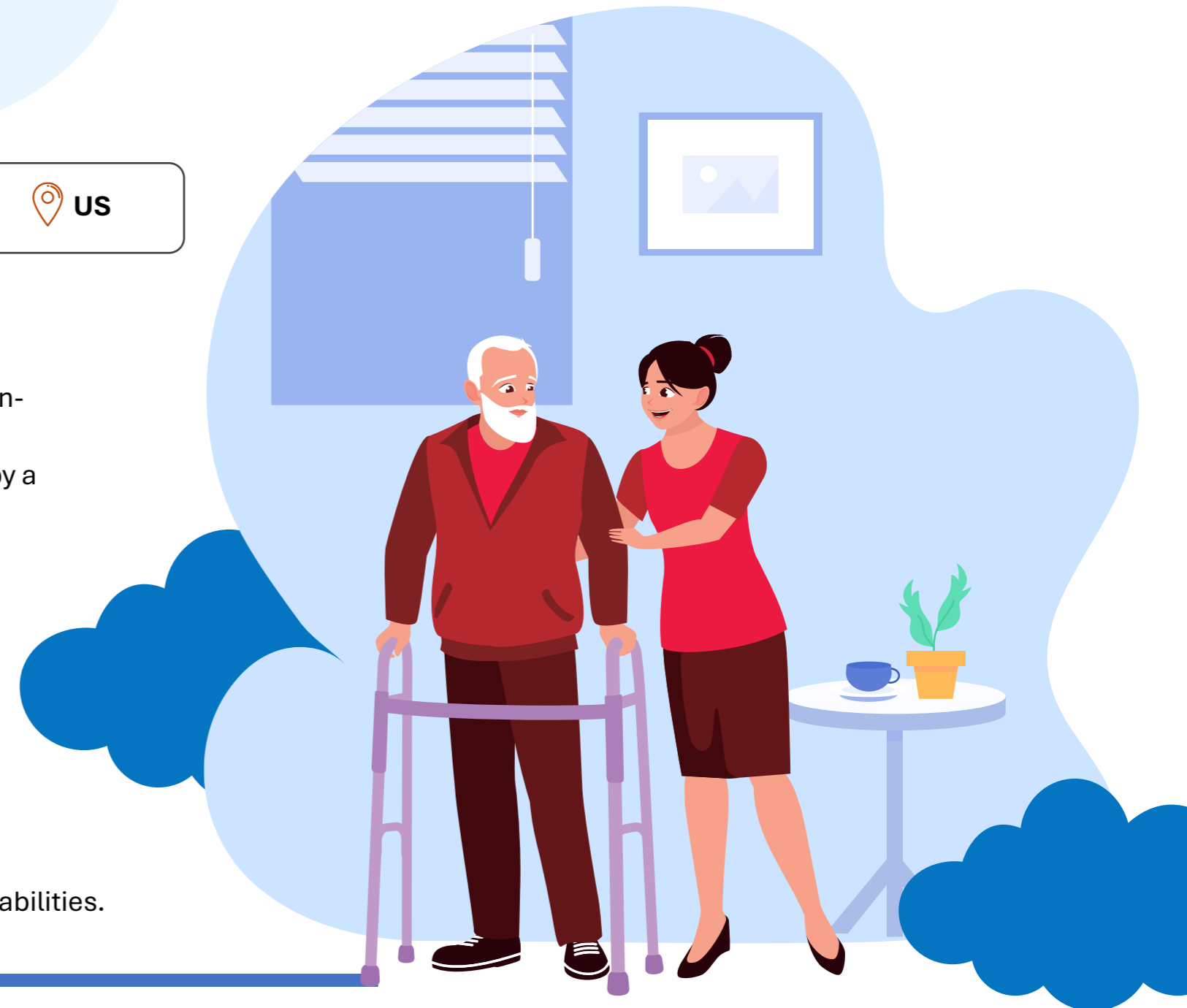
## Business Context & Our Customer

Our customer was a Senior Care Support Services organization providing non-medical, in-home assistance to elderly clients, primarily aged 70+. Their services included mobility support, wellness check-ins, routine assistance, and scheduled home visits, delivered by a distributed network of field caregivers.

The organization operated across multiple regions and needed a centralized digital platform to manage:

- ✓ Client intake and service requests
- ✓ Scheduling of caregivers for home visits
- ✓ Travel optimization and route planning
- ✓ Secure record-keeping and visit notes
- ✓ Operational oversight for a central admin team

The solution needed to be scalable, cost-effective, and built using native Salesforce capabilities.





## Problem Statement / Challenges Faced

- ✓ Manual booking and scheduling through calls and spreadsheets
- ✓ Difficulty assigning caregivers based on location, availability, and travel time
- ✓ Limited visibility for central admins into field operations
- ✓ Need to restrict caregiver access to only their assigned clients
- ✓ Inefficient travel routes leading to increased operational costs
- ✓ Lack of consolidated reporting on visits, cancellations, and caregiver utilization



## What We Did

We implemented a Salesforce Service Cloud centric solution, leveraging Field Service Lightning (FSL) and Maps, without heavy custom development.

### Key Solution Components



#### Service Cloud Configuration

- Configured Cases as service requests for senior care visits
- Implemented custom record types for different support services
- Automated service lifecycle using **Salesforce Flows**



#### Field Service Lightning (FSL)

- Modeled home visits using **Work Orders and Service Appointments**
- Configured appointment types, durations, and service territories
- Enabled caregiver availability, skills, and territory-based assignment
- Automated travel time calculation between visits



#### Maps, Routing & Travel Optimization

- Integrated **Google Maps** to:
- Optimize caregiver routes
- Estimate travel time and distance
- Improve appointment sequencing
- Provided admins with visibility into caregiver schedules and locations



#### Security & License Optimization

- Used **Service Cloud Enterprise license** for central administrators
- Used **Platform licenses** for caregivers
- Designed role hierarchy, sharing rules, and permission sets to:
- Ensure caregivers only see their own clients and appointments
- Provide HQ with complete operational oversight



#### Notifications & Tracking

- Automated booking confirmations and visit reminders
- Status tracking for scheduled, completed, and cancelled visits
- Audit trail for visit updates and notes



#### Reporting & Analytics

- Dashboards for:
  - Daily and weekly visits, Caregiver utilization, Travel time and distance analysis, Missed or rescheduled visits



## Value We Offered

- ✓ Centralized platform for managing senior care visits
- ✓ Improved scheduling efficiency and reduced caregiver travel time
- ✓ Strong data security and role-based access control
- ✓ Optimized Salesforce license usage (Enterprise + Platform)
- ✓ Better visibility into field operations for admin teams
- ✓ Scalable foundation to onboard new caregivers and regions



## Lessons Learned

- ✓ Salesforce Service Cloud + FSL is well-suited for non-medical senior care operations
- ✓ Territory-based scheduling significantly improves service delivery efficiency
- ✓ Platform licenses can be effectively used for field users with proper security design
- ✓ Declarative automation ensures faster enhancements and easier maintenance
- ✓ Clear role and access models are critical in senior-focused services



## Conclusion

This implementation demonstrated how Salesforce Service Cloud, combined with Field Service Lightning and mapping capabilities, can successfully support non-medical senior care services requiring scheduled home visits, efficient routing, and secure field operations.

