



*Engineered for Scale. Built for Impact.*

CASE STUDY

# Salesforce Field Service for Global Auditing Operations

**Industry** Professional Services & Auditing  
**Platform** Salesforce Field Service

*About this case study: This engagement was led personally by the founder of UniHail Solutions in a prior engagement. Client details are anonymized to respect confidentiality.*

**100+**  
Countries Served

**1,000+**  
Field Auditors

**1,500+**  
Employees

## BACKGROUND

The client, a large global professional services organization operating across 100+ countries with over 1,500 employees and more than 1,000 field auditors, needed to replace a legacy field operations platform. The existing system lacked real-time visibility, relied heavily on manual coordination, and could not support the scale and governance requirements of global audit operations.

## CHALLENGES

- Fragmented legacy platform with no unified operational view
- Manual scheduling workflows creating coordination inefficiencies
- Email-driven tracking of audit engagements with limited accountability



- Lack of real-time visibility into field audit execution
- Coordination gaps between central planning teams and field auditors
- Limited operational reporting and compliance monitoring capabilities

## **SOLUTION**

Salesforce Field Service was implemented as the core operational platform, supported by custom data modeling, automation, and integrations. The solution was designed to standardize global audit field operations while maintaining enterprise-grade governance.

- Work Orders representing audit engagements with full lifecycle tracking
- Intelligent resource scheduling using Salesforce Dispatcher Console
- Auditor check-in and check-out tracking for accountability
- Approval workflows and escalation mechanisms for audit governance
- Operational dashboards and compliance monitoring
- Integration with external document storage systems
- Salesforce Field Service Mobile App enablement for field auditors

## **FOUNDER'S ROLE & RESPONSIBILITIES**

- Hands-on Salesforce consulting and solution design
- Custom development, configuration, and automation implementation
- Technical leadership on architecture and design decisions
- Collaboration with solution architects on enterprise-grade design patterns
- Core implementation delivery and quality assurance

## **RESULTS & IMPACT**

- Standardized field operation processes across 100+ countries
- Improved cross-region coordination and operational consistency
- Enhanced real-time visibility into audit execution and progress
- Established a scalable foundation for future enhancements and expansion

## **THE UNIHAIL ADVANTAGE**

This implementation showcases how UniHail Solutions' founder adapts Salesforce Field Service beyond traditional service use cases to support complex global operational models. The engagement highlights the importance of structured architecture, stakeholder alignment, and hands-on technical execution — delivering a platform built for global-scale governance and operational excellence.