



FIELD SERVICE MANAGEMENT IMPLEMENTATION



FIELD SERVICE MANAGEMENT (FSM) IMPLEMENTATION

Our Field Service Management implementation is flexible and will give you enough hours to setup, configure and customize Salesforce FSM to support your service needs. We offer deep technical expertise and a comprehensive understanding of real-world field operations which is what sustainable Field Service Management implementations require.

Discovery Sessions with Internal Divisions

Using a structured agenda, our consultants will facilitate requirements gathering sessions to quickly learn the specifics of your business for the best possible setup. We will define service territories, user roles, schedules, dispatching, appointment bookings, route management, inventory, and reporting & dashboards. This discovery will also include project related roles, responsibilities as well as sprint and delivery timelines.

Salesforce.com Configuration

Configure Salesforce to support your field service methodology while making it quick and easy for your users to enter and update records. We make certain that Salesforce is optimized to provide your users the best experience possible. We will simplify the user interface and overall navigation to drive the best user adoption.

This includes configuration of the following CRM components:

- Installation of the Field Service Management managed package
- User Setup with creation of field service permissions
- Setup of Service Cloud cases for intake of new issues
- Setup of service-related assets and entitlements
- Identification of field service territories
- Setup of resource skills and work types
- Setup of work order management, service appointments & route optimization
- Setup dispatch console to drive rep assignment efficiencies
- Setup of field service inventory as appropriate
- Document and manage scheduling policies
- Create service resource time sheets and resource calendars
- Setup of billing, invoicing and payment applications
- Setup of customer satisfactions surveys
- Create all FSM related objects and custom fields specifically for your business
- Setup Field Service application pages and /or page layouts for your service team
- Setup and simplification of the field service mobile application



What Makes Cirrius Solutions Different?

800+

We've Completed Over 800 Projects

TOP 1%

We're in the Top 1% of All Consulting Partners.



Our 5 Star Average Rating on Appexchange

Creation of Reports and Dashboards

Visibility to your company's field service data is critical for the management team to make decisions. This will allow you to show that your Salesforce investment is providing value. We will assist with external report creation for both technicians and dispatchers for workorders, work order line items, or service appointments that can be emailed directly to the customer. For the internal team we can provide clear data insights to improve every on-site experience. Field Service analytics empowers managers monitor all customer service interactions with actionable metrics.

Training of Power Users / End Users

The Cirrius team will hold a live GoToMeeting with your end users to show them how the new Salesforce functionality has been configured within your Salesforce.com instance. This is meant to be an interactive session with questions and answers to be sure your team is 100% confident at the time of Go-Live. We'll cover key concepts, how Salesforce manages service data, and best practices on quickly finding, creating and updating records and explain how the new system will benefit your team. We record these session(s) for you to use on any new users in your organization.

SUPPORT AND MANAGED SERVICES

We offer subscription access to technical expertise with a comprehensive understanding of real-world field operations. Our Field Service Management support team implements and streamlines the systems that allow you to monitor, manage, and provide information to remote field service teams. Let us take care of your Field Service Management configuration so that you can focus on running your business.

GET STARTED TODAY!

Learn more about how Cirrius Solutions can help you make the most of your Salesforce.com investment.

Please contact your Cirrius Solutions Client Success Manager directly at info@cirriussolutions.com for more information.

