



THE ULTIMATE SALESFORCE FIELD SERVICE IMPLEMENTATION GUIDE



THE FIELD SERVICE INDUSTRY

In the last few years, the field service industry has experienced robust growth with the need for an improved customer experience to stay ahead of the competition. The Field Service Management (FSM) market growth is forecasted at a CAGR of 16.2%. At this rate, the FSM market with an estimated value of \$2.8 billion in 2019 will reach \$5.9 billion by 2024.

KEY STATISTICS YOU SHOULD KNOW:

- North America will be the fastest-growing market for cloud FSM software. (Mordor Intelligence)
- 48% of organizations are using FSM software (Fieldpoint)
- 38% of Service Technicians can't access all the information they need (Fieldpoint)
- 52% of companies still use manual methods for most of their field service tasks. (Salesforce)
- 72% of organizations are prioritizing improvements in customer satisfaction in field service (Field Technologies Online)

These statistics demonstrate the importance of having an automated field service solution to become a market leader. Field service management is about speed, ease of use, and real-time communication to provide best-in-class customer service. The unexpected will always happen, but with agility and visibility provided by the Salesforce field service application to provide fast decision-making, the impact will be significantly reduced. The organizations that have the software in place to handle such unplanned scenarios will be able to maximize their return on investment and will emerge as market winners.

The key to your success will be to find a strong partner with proven success delivering optimized solutions with a simple interface to maximize usability. The Cirrius Solutions team has mastered the complexity of both the field service management process and data analytics (AI) needed for enterprise-level implementations. We offer deep technical expertise and a comprehensive understanding of real-world field operations which is what sustainable FSM implementations require. We feel that upfront planning is one of the most significant success factors for us to deliver the right solution(s).



The CIRRIUS team provided above and beyond service... They met our deliverable in a timely manner. They are both knowledgeable and flexible in their approach. They provided suggestions as needed. Most importantly they did a great job of listening an asset that cannot be emphasized enough. All of these skills contributed to the success of our project and bode well for future partnership.

Vincent Miller
Project Director DCRI



We've now worked with the Cirrius team for over a year and a half, and they have become integral to the success of our business. They've given us exceptional customer service – checking in regularly, ensuring they're meeting and exceeding expectations, addressing any concerns or issues as soon as they arise often with personal calls or emails to address head-on, and beyond. ...Cirrius also put together a well-rounded team for us ...I trust that they are fair and smart in their guidance. And the work itself that has been delivered has been of the highest quality.

Sandra Dube
Director of Business
Development



Start with a Strong Discovery:

At Cirrius, we feel that the Salesforce field service discovery process is a critical aspect of the project. If not done correctly, downstream activities will suffer, or worse, the implementation will be completely unusable.

Field service management is becoming increasingly complex and field service managers are required to do more than ever. Executives ask that front-line managers to control costs and increase customer satisfaction without cutting corners on speed and quality. Reading between the lines, the goal is to optimize service efficiency.

To increase customer satisfaction, service businesses have implemented a variety of different strategies. Those with the size and budget to sustain a very large-scale operation have added more field technicians on the ground and more trucks in the field to ensure that all jobs are fulfilled in a timely manner. However, this all comes at a cost. The increased capacity can be underused, which leads to diminishing margins and potentially turning a profit center into a cost center. Our experts have years of experience helping customers tackle this problem and we have created this Salesforce field service discovery questionnaire to help scope your implementation.



We've been paying for Salesforce for years; however, getting our team to adopt has been challenging to say the least. The Cirrius team helped us customize our system to meet our needs by matching our sales process and improving the overall user experience. With the help of Cirrius Solutions we now have a functioning system that our sales team is adopting the use of allowing us to better manage our business. The Cirrius team has consistently met or exceeded our expectations and continue to be a valued partner for our business!

Michele Hellmann
Director Business
Operations

Salesforce Field Service Discovery Questions:

- Describe your current field service process.
- What solution do you have in place for field service today?
- What mobile platform are you using? How is it integrated into your service platform or CRM?
- How many mobile employees or technicians do you have?
- Are your field technicians' employees or contractors?
- What are the biggest challenges you are having in delivering field service to your customers?
- What is the nature of the field service provided to your customers?
- Do you do preventive maintenance? repairs? appointment scheduling?
- What are your biggest field service pain points?
- Are your customer service and field service strategies aligned?
- How do you communicate with your employees in the field?
- What is the business case? What are the most important metrics expected to improve through the implementation?
- What are the strategy and vision for the field service business?
- What software applications are you currently using to handle field service?
- What are your current cost drivers for field service in your organization?
- What industries do you operate in?
- What are the main Salesforce field service use cases?
- How many field service technicians do you have and how are they distributed?
- How many field service dispatchers do you have?
- What is the number of business units you are servicing with your field service team?
- How are customer service reps integrated into the process? Would they be included as part of the project?
- What additional systems will be passing information into the Salesforce field service application?
- How do you plan on managing inventory for your field service team?
- What is the offline use case, if any?

The Salesforce field service discovery questions above are meant to be used as part of a 1-hour field service project scoping call to help drive discussions with your key stakeholders.

We also have an exhaustive list of questions for the entire implementation that covers case setup, work order management, dispatch management, scheduling, inventory management, products & assets, mobile optimization, billing & invoicing and downstream integrations.



Quick Facts

- Top 1% of Salesforce Consulting Firms
- We have 95% of the certifications available on the platform
- We practice Salesforce best practices from start to finish
- Over 85 5-start reviews!
- Over 800+ Successful implementation across the globe



Salesforce Field Service Implementation:

Delivering excellent service at any stage of the customer lifecycle is critical, but especially during the implementation. This is why we created this Salesforce field service implementation checklist, to ensure our strategy is rock solid. To optimize efficiency, forward-thinking field service organizations are blending modern technology and predictive analytics to look at field service operations holistically. By analyzing every aspect of the customer experience, service organizations can start to leverage performance patterns and environmental factors to better plan and manage their day-to-day operations.

Salesforce Field Service Management software is essential for large service-based enterprises with hundreds of technicians in the field. The typical solution consists of a centralized dispatch that distributes jobs to mobile employees against a set of systematic rules. Salesforce Field Service technology is evolving rapidly and becoming more dynamic to fit individual business needs. Customers and employees continue to demand consumer-led experiences, using their own devices. Advanced job routing engines can squeeze the white space out of a team's day without threatening wait times, first-time fix rates, and customer satisfaction. Connected field service management solutions, like Field Service Lightning, create a harmonious relationship between dispatch operations, field workers, management, and your customers!

The success of your Salesforce field service implementation is dependent on your understanding of the key implementation tasks.



Why Use A Certified Partner?

- Accountability for quality & delivery
- Development done right the first time
- Rapid time to value
- Deliver scalable solutions to meet growth needs
- Help you drive user adoption

Salesforce Field Service Implementation Checklist:

- Import accounts and setup cases to support incoming jobs and service tickets
- User setup which will include the creation of field service permissions
- Identification of field service territories for intelligent scheduling & dispatch
- Setup of field service workforce with skillsets, skill-levels, certifications, etc.
- Setup of service types to align with your workforce and job routing
- Setup timesheets for time entry and tracking of onsite visits
- Enable Salesforce maps to optimize territories, schedules, and map routes for field reps
- Setup of work order management and service appointments
- Creation of field service schedules for route optimization
- Setup dispatch console (appointment list and service maps)
- Create and manage scheduling policies
- Create service resource time sheets and resource calendars
- Create all FSL related objects and custom fields specific to your business
- Setup mobile configurations for service agents
- Setup of assets and inventory to ensure remote agents have the needed parts for the job
- Build an integration with ERP as necessary to track inventory (NetSuite, Sage Intacct, QuickBooks, etc.)
- Setup knowledge articles, FAQ's, installation instructions and checklists for agents in the field
- Setup service maintenance plans as required to eliminate non-revenue generating driver service calls
- Creation of post-visit surveys to track customer satisfaction
- Creation of service reports and dashboards to track key service metrics

The list above is a comprehensive checklist of Salesforce Field Service Management features that should be considered during your implementation.



What Makes Cirrius Solutions Different?

800+

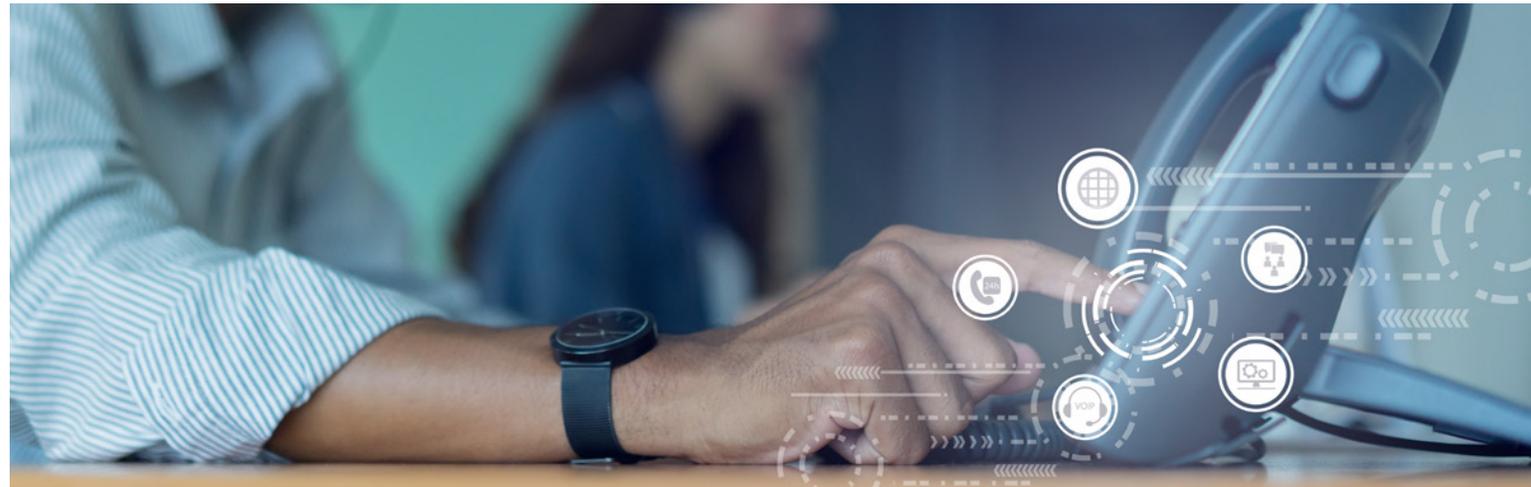
We've Completed Over 800 Projects

TOP 1%

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



Our 5 Star Average Rating on Appexchange



Why Utilize Cirrius Solutions Salesforce Field Service Experts:

We are rock solid at setting up Salesforce field service management projects! We tell you the truth and we don't exaggerate. We all have strengths and weaknesses. At Cirrius, we will provide an honest synopsis of our team members' experience to arrive at the perfect team for your Salesforce field service project. We are smart, reliable, work tirelessly, and are masters of our individual development areas.

Cirrius Solutions provides best-in-class business solutions to help companies adopt essential field service dispatch and workforce applications. We pride ourselves on our good communication and our creation of solutions that enhance your use of the platform do drive business success. Our top 1% customer satisfaction rating says it all, the Cirrius team will provide you with 5-Star experience!

Ready to move forward on your next Salesforce project?

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

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

