Salesforce Field Service

Why it works, where it breaks, and how we fix it — The Field Service Podcast

Agenda

- Why Field Service is so popular
- Standout features and wins
- Where implementations go sideways
- How Cirrius solves these problems

Why Field Service is so popular

- Right tech, right job, right time
- Higher first-time fix rates
- Proactive customer communication
- Personalized, history-aware service

"Customers want to stay competitive — and that means modernizing how field work gets done. Field Service replaces tribal knowledge, paper tickets, and disconnected tools with a single platform that connects the dispatcher, the technician, and the end customer in real time."

Modernizing operations

01

Smart Scheduling

Match the right tech or crew to the right job, based on location, skills, availability, parts, and priority.

02

Proactive Comms

Keep technicians and end customers informed before issues arise — fewer missed appointments, fewer surprises.

03

Higher First-Time Fix

Techs arrive with the right parts, work order context, and service history to close the job on the first visit.

Modernizing the experience

01

Effortless Customer XP

End customers don't have to repeat issue details or service history to every agent, dispatcher, and tech they encounter.

02

Faster Onboarding

Intuitive, guided processes get new hires productive in days instead of months — and reduce reliance on tribal knowledge.

03

Metrics That Matter

Track the KPIs that surface bottlenecks and drive continuous improvement across your service organization.

Standout features and wins

01
Dispatch Console

- Drag-and-drop scheduling with policy and filter controls.
- Dynamic map view of tech locations, plus live availability and absences.

02
FS Mobile Flow

- Guided workflows on the technician's mobile device.
- Photo and file capture from the field.
- Customer signature on completion.

03
Crew, Plans & Inventory

- Crew Management for multi-tech jobs.
- Maintenance Plans for recurring service.
- Shift Management for complex schedules.
- Inventory tracking down to the truck.

Pitfalls in the foundation

01

Bad Data

- Migrations bring in messy, duplicated, or incomplete records.
- Bad data on day one quickly erodes user trust in the new system.

02

No Defined Process

Configuring software around a process that hasn't been agreed on creates rework — and a system that doesn't match how the business actually runs.

03

Weak Change Management

When changes aren't communicated, trained, or championed across the org, users find out about them by tripping over them at launch.

Pitfalls in scope and build

01

Automation Too Soon

Customers want advanced automation before the foundation is stable. *Automating a broken process just helps it break faster.*

02

Photo & Doc Capture

Underestimated and under-designed in scoping — yet critical for proof of work, warranty claims, and downstream invoicing.

03

Integration Gaps

Integrations aren't fully thought through or scoped, leaving data stranded across systems and undermining the single source of truth.

Adoption is the silent killer

Even great configuration fails if the people in the field — and the customer on the other end — don't trust it. The most common adoption failures we see:

Field users aren't always tech-first. Non-technical users need workflows designed around how they actually work.

Tribal knowledge becomes digital process. What lived in someone's head now has to live in the system.

Poor data quality kills trust. If techs see bad information once, they stop relying on the app.

No change management plan. Users find out about changes by tripping over them at launch.

Too much customization too early. Heavy custom work before the foundation is solid creates fragile systems.

Customer communication expectations. Clarify what "proactive communication" means before you automate it.

Training timed too late. Waiting until the end of the project means users see the system for the first time at launch.

How Cirrius solves it

01

The Cirrius Accelerator

A purpose-built baseline for Field Service. Customers start configured, not from scratch — and the Accelerator evolves with every project.

02

Comms Expectations

We define what proactive customer communication actually means for your business — channels, cadence, and escalation paths — before we automate any of it.

03

Change Management

Adoption as a discipline, not a phase. We work with your team on stakeholder alignment, training cadence, and rollout communication so launch day isn't the first time users see the system.

Field Service *rewards* discipline.

1. *Foundation first.*
2. *Automation second.*



Want to talk Field Service?
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