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RSM

Salesforce Field Service buyer's guide

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Overview

Field service applications provide powerful capabilities for any company that offers on-site services. On-site functions include estimation, installation, maintenance, repair, inspection and cleanup. In addition, on-site visits may be a single occurrence, at regular intervals (subscription-based), as needed (event-based) or in any combination depending upon a company's business model. Leading manufacturing, business services, distribution, installation, inspection, real estate, construction and agriculture companies have all benefited from digitally transforming their field operations using field service solutions to grow their business while providing better customer service.

Common field service challenges

Field operations can be highly complex and include large physical costs. Most companies start with highly manual processes and rudimentary tools. The person responsible for coordinating activities often uses spreadsheets, cellphones and whiteboards to deliver service but often requires heroic efforts to address chaos and growth. Some of the more common challenges with these manual processes include:

- **Lack of visibility and coordination between field teams and office staff, resulting in wasted time and resources.** Managers must manually organize, assign and adjust work orders, which can lead to overbooking, underutilization, missed appointments and unhappy customers. Without a centralized solution, organizing and tracking field work, communicating changes and updates, and ensuring efficiency, consistency and quality of service become difficult. Each "truck roll" is typically a high-cost effort that includes physical and labor costs. A missed appointment, a truck that doesn't return empty or a missing part that requires a return visit are examples of situations that create significant additional cost.
- **Low customer ratings and retention due to poor service experience.** Without a customer-centric solution, many opportunities are missed to delight and impress customers. Customers may feel frustrated by the inability to book appointments online, receive notifications and reminders, track the status and location of their technicians, receive an online and well-documented trip report and provide feedback after the service. In addition, without a scalable solution, customers may experience long wait times, lack of transparency, inaccurate estimates and unresolved issues.
- **Revenue leakage and other missed opportunities to generate more revenue and value.** Without data and insights, field service can be seen as a cost center rather than a profit center. Managers and technicians may not have the information and systems to act on potential upsell and cross-sell opportunities. Every on-site customer interaction is an opportunity to understand, educate, impress and build stronger relationships with the customer. The inability to capture customer-facing activities while on-site can result in lost revenue, such as when a field technician "does the paperwork" days later back at the office and misses billing the customer for additional work performed.

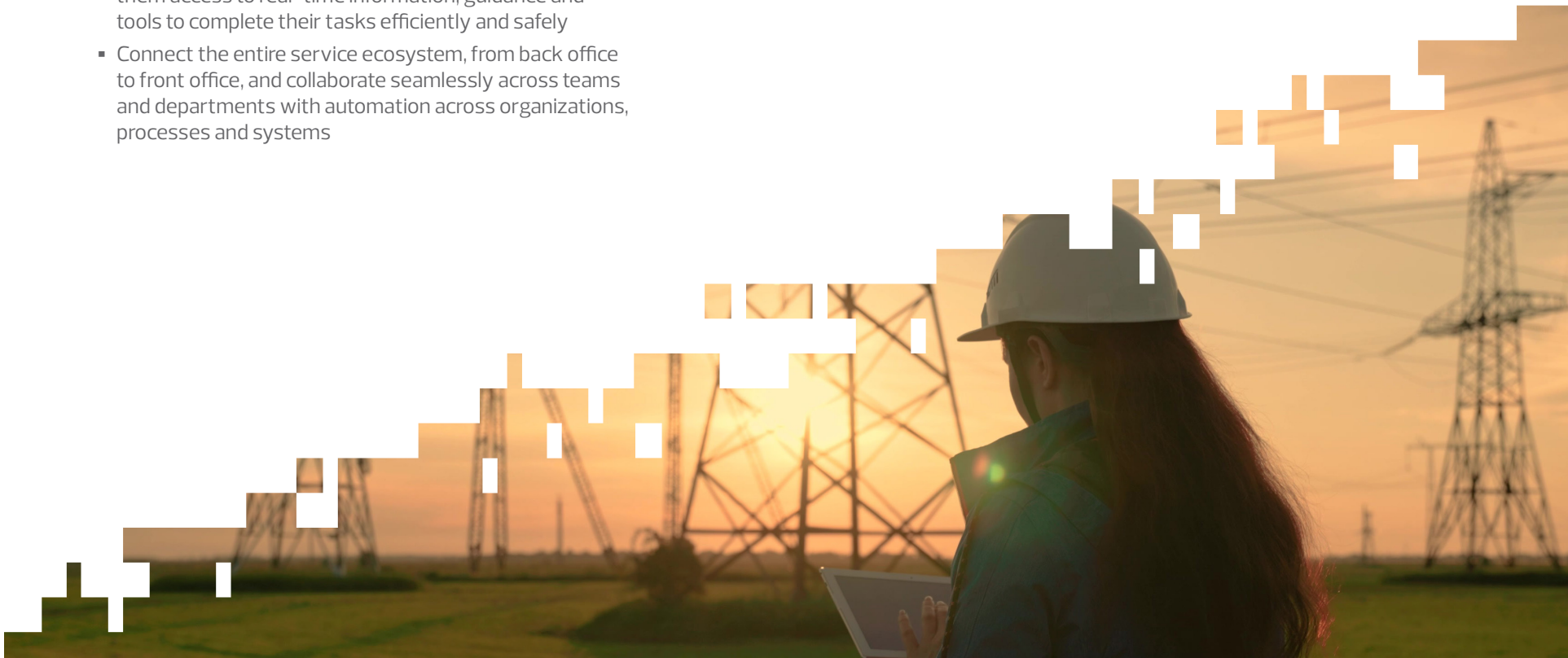
Overview of Salesforce Field Service

Salesforce is the world's No. 1 customer relationship management (CRM) platform, driving growth for more than 150,000 customers around the globe. Its cloud-based technology brings together a company's marketing, sales, commerce, service and IT teams from anywhere in the world.

The Salesforce platform allows your team to store, track, manage and analyze marketing, sales, service and customer data to empower you to obtain a complete picture of your customers. Having a complete picture enables everyone at your company to focus on what's most important: delivering exceptional customer experiences.

Salesforce Field Service is a powerful software application within the overall Salesforce platform that helps your company deliver faster, smarter and more personalized service to your customers in the field. Used by organizations with technicians, installers, inspectors, agents or contractors, Salesforce Field Service can optimize field operations, increase customer satisfaction and reduce costs. With Salesforce Field Service, your company can:

- Schedule and dispatch the right resources to the right jobs at the right time, using intelligent automation and optimization algorithms
- Track and ensure the right inventory and tools are in place to match each customer's need and make the most of each on-site visit
- Equip mobile workers with offline-ready apps that give them access to real-time information, guidance and tools to complete their tasks efficiently and safely
- Connect the entire service ecosystem, from back office to front office, and collaborate seamlessly across teams and departments with automation across organizations, processes and systems
- Leverage the power of the Salesforce platform to integrate data and business functions to create a unified, source-of-truth view of your customers and operations
- Empower your customers with self-service portals, chatbots and notifications that keep them informed and engaged throughout their service journey



Overview of Salesforce Field Service, continued

Salesforce Field Service is part of the Salesforce Service Cloud, which also includes other features such as case management, omnichannel support, knowledge base and analytics. Together, they provide a comprehensive suite of tools to deliver exceptional service across every touchpoint.

Moving to the cloud

Migrating to a new platform is an important step for any organization and rarely a decision that should be made in isolation, given the interconnectedness of processes and systems. Every important system participates in an overall process, such as lead-to-order or work order-to-cash, and the more seamless the process, the more the system can be automated and scaled. Just as important, each system collects valuable customer information that's part of a larger 360-degree view of the customer. From there, insights can be gained, and processes can be automated to grow the success of those customers and your business.

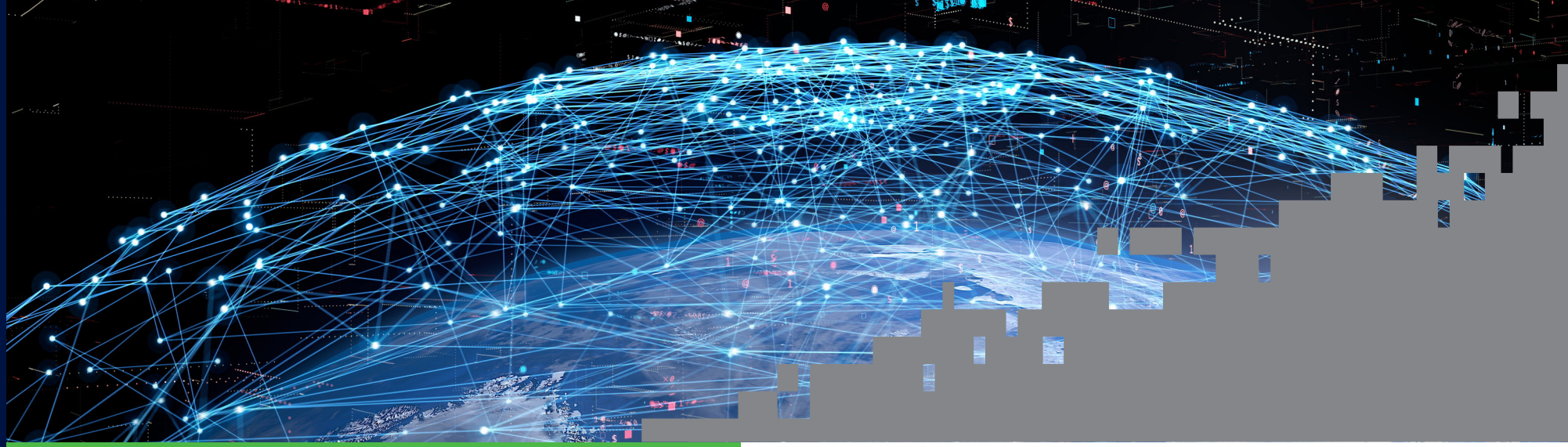
Here are some factors to consider:

- **Cloud-based solutions:**
  While cloud-based solutions require configuration, they can be implemented relatively quickly and generally cost less than on-premises solutions. A phased approach will typically have more costs, as it may be necessary to do more integration work—but cloud solutions are designed to be flexible, and application programmable interfaces (APIs) enable interoperability.

- **A full suite of tools:**
  Salesforce offers a suite of solutions that can be purchased individually or together to form a multicloud environment. The big advantage of such a platform is that data is consolidated in one layer—and the platform's growth, support and administration become less expensive due to the economics of scale and scope. With cloud solutions, procuring a software solution is easy to do and can be done in phases as part of a larger road map. Sometimes, a tradeoff occurs between best of breed products and the benefits of a platform or suite, but many of Salesforce's products happen to be at the top of each of their categories.

- **Upgradeability:**
  This refers to how often the vendor provides updates to the software and how easy those upgrades are to implement. Salesforce offers seasonal updates—spring, summer and winter—delivered in real time and require only five minutes of scheduled maintenance. These upgrades happen automatically on specific dates that are published up to a year in advance on the Salesforce Trust website. Updates are all in the cloud, so upgrading hardware or software is not necessary.

- **Platform trajectory:**
  When adopting any new software, you'll want to evaluate where the software and vendor are headed. Is the company making significant investments in its platform to improve its solutions? Is the company adapting and evolving its software to adjust to continually changing market factors? Or is it staying static, with the same technology it had six months or a year ago—or longer? As noted, Salesforce makes three seasonal updates every year, delivering hundreds of innovative features and upgrades. Salesforce is a market leader in almost every software solution category—the company is always listening to its customers and improving its platform.



Who is RSM, and what do we do?

RSM is the leading provider of assurance, tax and consulting services focused on the middle market. With over 73,000 clients across more than 20 industries, we deliver top technology, financial, transaction, risk and business consulting services.

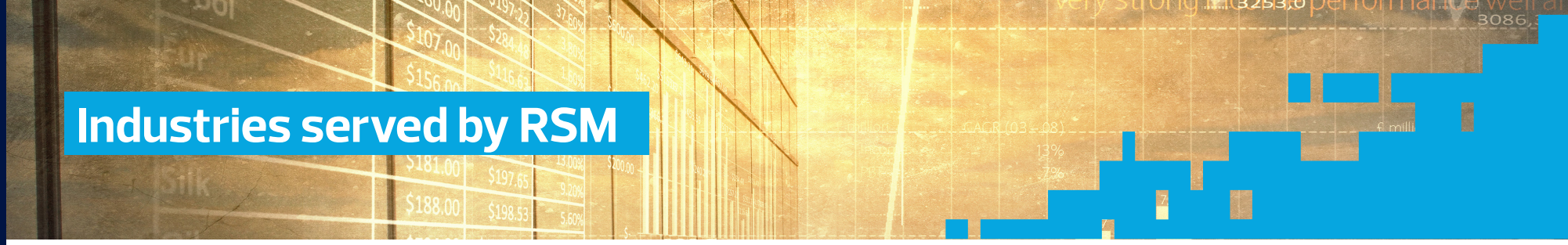
Our consultants have deep experience in the industry-specific challenges and opportunities that our clients face. We're committed to understanding each company's unique situation, and we're constantly working to address the most important issues in their industries.

RSM Salesforce services

With more than 15 years of Salesforce experience, over 1,000 completed projects and a 4.9/5 customer satisfaction score, RSM is the go-to Salesforce consulting advisor for the middle market. Our team of consultants and technologists have earned more than 400 Salesforce certifications, and we are a Summit-level member of the Salesforce Partner Program, the highest tier possible.

RSM's Salesforce practice is well-versed in planning and digital transformations for quote-to-cash, mergers/acquisitions/carveouts and customer support and field service operations. These client initiatives require a deep and wide range of skills that cross organizational, business process, system and data silos. Starting from strategy and design, having a holistic view of the overall business is critical to delivering the maximum business value from your Salesforce investment.

We understand the needs and goals of marketing, sales, operations, customer service, field operations, finance, compliance and more. With this perspective, we unlock the ability of Salesforce to automate processes across organizations, generate source-of-truth data that gives full visibility to the customer, provide capabilities that deliver optimal customer experiences and establish a foundation that generates future benefits with less rework.



Industries served by RSM

RSM has extensive experience implementing Salesforce for customers in more than 20 different industries, each with unique needs and specifications. In the Field Service space alone, we have served customers in a number of industries, including construction, real estate, manufacturing, business services, agriculture, food and beverage and more.

Case study:

Salesforce field service to cash integration reduces revenue leakage

Industry: Construction tech services

Overview

Our client is a western region construction services company that provides geological testing of job sites before and during construction projects. The company works primarily on commercial projects and performs critical, on-site services to ensure the safety and compliance of construction projects.

Typical of many fast-growing companies, the business was outgrowing their front-, middle- and back-office infrastructure. On-site services were planned, conducted and invoiced through many disparate systems that were also becoming outdated in their ability to handle growth. Streamlining and scaling the field service to cash operations would greatly increase efficiency, decrease revenue leakage and significantly improve the business's valuation.

Challenge

The company was seeing fast growth along with a private equity investment to capture new market opportunities. Multiple systems and databases were used to handle sales, manage projects and keep track of customer data, resulting in triple data entry. Because many disparate systems were used, it was difficult to have a single "source of truth" for data, and inconsistencies resulted in data duplication and inaccuracies, causing employees not to trust the data fully. The quality of data reporting on the business was deeply affected.

On-site services are at the heart of the business. Working with customers directly to schedule work orders, conduct services, solve their problems and quickly invoice for their work represented the field service to cash life cycle. Due to their fast growth, they had not had the chance to migrate from their QuickBooks accounting system and planned to modernize it in the future. In the meantime, performing work and inputting the needed data was extremely time consuming and error prone. The need to copy the data into their financial systems once they returned to the office resulted in long lags between dispatch to invoice. The manual effort required to input the data also resulted in revenue leakage as some services were not fully captured in the system at the time of service. Trip charges, overtime charges and expenses for consumables were often missed.

The solution

RSM worked with the client to design and build a full-service stack that would automate many of the processes while providing a single source of truth data layer for full business transparency.

Salesforce Service Cloud and Field Service provided the foundation for all process controls, automation and analytics, and they unified the data to provide a 360-degree view of the customer. Field technicians could plan, dispatch, conduct and complete their on-site projects with much greater ease and efficiency.

Dispatch operations were automated, which included wizards to schedule recurring appointments. Project scope and budgeting were provided on field technicians' mobile devices so they could achieve on-target billing better, resulting in higher customer satisfaction.

As their on-site job effectiveness increased, field technicians could proactively add more field lab tests while on-site—they could order, sign for and invoice additional services, which resulted in increased revenues.

Because the field technicians could initiate additional services and invoicing on-site, and the billing rules were fully automated, the speed of getting paid improved, even as downstream changes occurred.

The takeaway

The company's field service to cash operations were automated to increase efficiency significantly across a geographically dispersed organization. Because of the platform approach, a single source of truth was established, providing accurate reporting, even across integrations to other systems.

Empowering the field technicians, from dispatch to work order completion, enabled them to proactively add more value-added services to the customer and capture all revenue events while also getting paid faster.

These improvements helped advance the valuation of the business. The client had a very successful exit a year after the project's completion.

Industries served by RSM, continued

Case study:

RSM digitally transforms innovative food and agriculture technology company to scale their business

Industry: Ag-tech, industrials

Overview

Our client is a food technology company that assists food producers, processors and retailers to increase shelf life and reduce waste. The company's sales cycle is long-running with a "design win" trial approach. Given the requirements of the highly regulated food and agriculture industry, many steps need to be taken to evaluate, sell and implement their products and services.

Challenge

The client faced several challenges in their sales process, which was complex, long-running and involved many teams. Some of the main challenges were:

- In the "design win" trial approach, the client had to demonstrate their solution's effectiveness and value proposition in the customer's food production line. The demonstration involved multiple steps and coordination with different teams, such as business development, legal, finance and field engineers. For instance, business development needed to set up the trial, legal had to sign off on all agreements and manage compliance, finance had to agree to terms and conditions, and the field engineers needed to be on-site to integrate with the food production lines.
- Customers often started with a few production lines. A sale was not fully complete until all lines were implemented with the client's solution, which could take several months or even years, depending on the scale and complexity of the customer. Customer stagnation or even attrition needed to be actively managed to grow accounts.
- The client had to handle increasingly complex and larger-scale customers, such as multinational conglomerates with many brands (and sub-brands) and food production lines. The company had to track and target the potential opportunities for its solution across different stages of the food supply chain, from farm to shelf, and tailor its pitch and proposal accordingly.

The solution

To streamline the sales process and improve customer insights, the client leveraged Salesforce to optimize various aspects of their customer relationship management process, from lead to trial to implementation on a few lines to fully implemented across all lines to growing accounts across other customer brands. A scalable data architecture was built that reflected the size and complexity of their customer types, allowing them to tailor their solutions and grow their accounts more effectively for large-scale food-producing customers. In addition, they developed a data and reporting portal that gave them a 360-degree view of their customers and their KPIs.

By centralizing all data and processes in Salesforce, the client can scale their process to be more efficient to maximize positive trial outcomes, reduce cycle times and improve win rates. With data consolidated in a single source of truth, the client could get dashboards and reports to optimize their currently running pilots and improve their KPIs. All of this results in increased sales and efficiency.

In addition, as the client conducts trials with certain food products, the learnings from their pilots could be saved and reused for future opportunities for similar products with the same or different producers. The process would enable them to centralize and continuously leverage their organizational experience.

With a robust Salesforce and NetSuite platform, the client was well-positioned for future growth and expansion, as they could automate and enhance their quote-to-cash and then field service operations.

The takeaway

To support their rapid growth and complex operations, the client worked with RSM to implement Salesforce and NetSuite as their CRM and ERP platforms, as well as outsourced accounting services. This strategic move allowed the company to streamline their business processes, gain real-time visibility into their data, and focus on their core competence of developing cutting-edge technology.

With this solution platform, the client is planning to leverage their technology stack further to create more opportunities and enhance their competitive advantage. They are considering adding Field Service to their Salesforce solution, which will allow them to manage their field operation activities better, including scheduling, dispatching, tracking and reporting. Adding this solution would increase their efficiency and provide valuable information to optimize their trials and improve their outcomes. Moreover, they are exploring the possibility of using MuleSoft to integrate their Salesforce and NetSuite solutions, as well as other external systems, such as Internet of Things (IoT) devices, sensors and third-party applications. Integrating the solutions would enable them to create a seamless data flow across their systems, automate workflows and enhance their analytics capabilities.

By adopting these solutions, the client is well-positioned to scale their business and achieve their ambitious goals. They can offer faster, smarter and more personalized services to their customers while reducing operational costs and risks. They can also harness the power of their centralized data to generate insights and drive innovation.

Benefits of Salesforce Field Service

Salesforce provides your company with a platform to transform your field service operations and automate and optimize processes for your field service workforce (your agents, dispatchers and mobile workers). Using this solution, your team can perform critical field service functions like scheduling and dispatch, route optimization, work order management, asset management, inventory management, resource management and more.

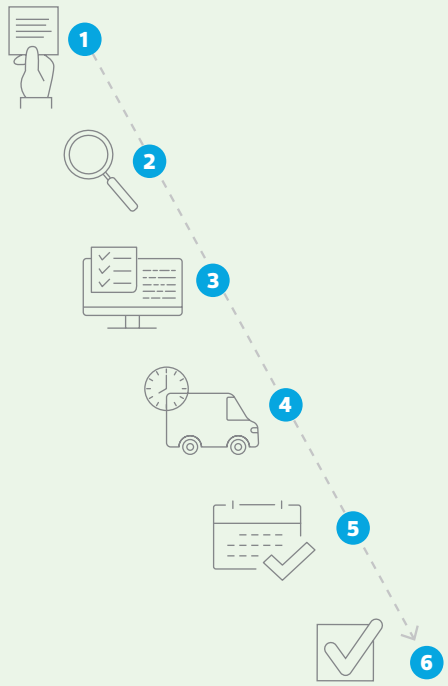
Salesforce Field Service provides a wide range of benefits, including:

- **Efficiency:** Service preparation, delivery and post-work activities can be delivered at scale to your mobile workers, giving them access to vital customer data, asset history and service records before and during each job. Proper preparation enables workers to prioritize on-site tasks and meet contractual terms consistently. Post-work summary features using AI create accurate site visit reports enriched with customer and asset data and images from on-site activities.
- **Mobile:** The Salesforce platform is mobile-ready, and the Field Service mobile app provides a one-stop shop for all the features mobile workers need. The app is also extensible and integrates with the rest of the Salesforce platform, including Slack, for easier collaboration. Salesforce also has offline capabilities, so work can be saved even if there is no Wi-Fi access.
- **Margin optimization:** Each truck roll can be expensive, and the scheduling and dispatch of resources should be optimized. Dispatch management is the central application for managing resources, including tracking skills and availability so the right person can be staffed to the right appointment while optimizing resource allocation, minimizing travel time and adhering to service-level agreements. Forecast and planning tools maximize resource utilization while providing visibility into resource needs in the future.
- **Work order management:** The ability to digitally transform the work order life cycle from creating, assigning and conducting to debriefing results in a streamlined process that minimizes manual paperwork, organizes data into one single view of the business and improves the customer and employee experience.
- **Asset management:** Gaining real-time information on assets in the field provides a critical shift from reacting to field issues to proactively maintaining and optimizing processes. Asset management shifts expensive break-fix costs and customer downtime to maintenance service options that improve customer experiences and meet service-level agreements. Because the platform is flexible, integrations with on-site sensors, for instance, create an IoT infrastructure that generates significantly more value for the customer.
- **Extending the customer experience:** With Salesforce Visual Remote Assistant, real-time video can be used to address issues virtually versus on-site. Connecting with experts online can guide customers through each step and address many issues much faster and with less expense. Self-service options also empower the customer to schedule appointments, receive real-time updates on their on-site visit and more in order to create valuable customer experiences with greater efficiency.

Benefits of Salesforce Field Service, continued

Your company can streamline the execution of work from the initial request to completion using Salesforce Field Service.

Scenario: How a customer can use Salesforce Field Service



1. **Request work:** Customer requests repairs to one of their products through supported channels: email, chat, phone and self-service portal. These requests (or cases) are routed to the proper team for triage and investigation.
2. **Investigation and initial resolution:** Service agents leverage knowledge articles and AI recommendations to add additional information to the case, such as investigation notes, initial resolution recommendations, SOPs, etc.
3. **Work order and appointment creation:** A work order is created to track the work to be done, and one or more service appointments are created for scheduling. This may be enriched with additional information such as SLAs, required skills and other data to aid in scheduling and dispatching.
4. **Appointment scheduling and dispatching:** Dispatchers leverage the pre-configured scheduling engine to find the best schedule and best technician for the appointment based on company priorities (e.g., minimizing travel, priority resources, etc.).
5. **Appointment execution:** Field technicians are notified and provided with all the information (location, work type, schedule, etc.) and documents (service reports, knowledge articles, checklists, etc.) they need to execute the work using mobile. Technicians can also update appointment details directly in the mobile app.
6. **Work closure:** Once the appointment is complete, automation can be leveraged to inform all relevant parties. All information captured throughout the process stays on the platform and is logged against the customer for reporting and analytics.

Evaluating Salesforce Field Service

Salesforce Field Service is a powerful tool that enables your organizations to modernize their infrastructure to best practices while providing an extensible platform to customize to the specific needs and strategy of your business. Built-in capabilities include the following:

Field Service capability map

Resource management

- Resource availabilities and capacities
- Resource crew/team management
- Shift template assignment
- Skills management

Work order/project management

- Knowledge articles
- Line item management
- Status management
- Work order business hours
- Work types and skills matching

Scheduling and dispatching

- Adhoc (same-day) route optimization
- Appointment status management
- Configurable scheduling views
- Customizable scheduling policies and priorities
- Multi-day appointments
- Multiple travel modes
- Scheduled route optimization
- Travel time calculation

Mobile-first appointment execution

- Appointment reminders and push notifications
- Geolocation tracking
- Knowledge articles
- Offline capability
- Personalized resource agenda view
- Custom push notifications
- Service reports
- Two-way communication (chatter)

Custom entitlement and SLA management

- Automatic SLA calculations
- Customer business hours
- Entitlement processes
- Entitlement tracking
- Real-time appointment location tracking
- Service contracts

Asset management

- Adhoc asset maintenance
- Asset warranty tracking
- Periodic asset maintenance
- Usage-based maintenance

Inventory management

- Appointment inventory requirements
- Inventory consumption tracking
- Inventory requests management
- Inventory transfers tracking
- Return orders management
- Shipment status tracking

Integrations and core platform capabilities

- Alerts and notifications
- Automation
- Field service via API
- Reporting and dashboards

Evaluating Salesforce Field Service, continued

- **Resource management**
  Resource management optimizes the utilization and productivity of your workforce. You can manage the availability and capability of your resources, such as technicians, equipment or vehicles, based on their location, skills, preferences and availability. Resource management also allows you to assign shift templates to your resources, which define their working hours, breaks and holidays. Additionally, you can manage the skills of your resources, such as certifications, licenses or experience levels.

- **Work order and project management**
  Work order and project management enable you to create, track and manage complex work orders and projects that involve multiple resources, tasks and locations. Work types and skills management matching are used to ensure the right available resources and requirements are working on the right projects. Moreover, you can monitor the progress and completion of your work orders or projects and provide visibility to service level agreement (SLA) compliance requirements. Searchable knowledge articles provide relevant information and guidance to your resources, such as troubleshooting steps, installation manuals or safety procedures.

- **Scheduling and dispatch**
  Scheduling and dispatch enable you to assign the right resources to the right appointments at the right time. You can manage scheduled, multiday projects and even ad hoc (same day) route optimization to adjust your schedules based on real-time events, such as traffic, cancellations or emergencies. Scheduling policies and priorities can be set up to ensure that the most important or urgent appointments are handled first with schedule optimization features to balance workload automatically, reduce travel time and increase efficiency. Status of work orders and real-time location and availability tracking of your resources provide visibility across your entire field operations team.

- **Mobile-first appointment execution**
  Salesforce Field Service empowers your mobile workers to deliver the best service to your customers with a mobile-first app that works online, offline and in remote places with limited connectivity. Your workers can receive appointment reminders and push notifications, view their daily agenda and route, access geolocation tracking and turn-by-turn directions, and update the status of their work orders. They can also access relevant knowledge articles, capture customer signatures, generate service reports and initiate two-way communication with the back office or the customer while on-site. With Salesforce Field Service, your mobile workers have everything they need to complete their jobs successfully and efficiently on their mobile devices.

- **Customer entitlement and SLA management**
  Salesforce Field Service helps you deliver consistent and reliable service to your customers by managing their entitlements and SLAs. You can also create and manage service contracts that specify the terms and conditions of your service offerings and link them to your entitlements and work orders. Automatic SLA calculations can be set up to view compliance as applied to work orders, appointments and customers' business hours and time zones. With Salesforce Field Service, you can ensure that your customers get the service they are entitled to and that you meet your contractual obligations.

- **Asset management**
  Salesforce Field Service enables you to manage the assets that your technicians service in the field, such as machines, equipment or devices. You can create and track asset records that store information, including serial number, location, warranty and maintenance history. You can also link assets to accounts, contacts, entitlements, work orders and other assets to create a complete view of your customers' assets and their relationships. Salesforce Field Service supports different types of asset maintenance, such as ad hoc (e.g., unscheduled repairs), periodic (recurring or milestone-based) and usage-based (usage, performance or sensor-initiated). Customers benefit greatly from responsive support and preventative action to minimize downtime and maximize customer experience and value.

- **Inventory management**
  Salesforce Field Service helps you manage the inventory of parts and products that your technicians need to complete their work orders. You can set appointment inventory requirements based on the type of service or the asset condition so that your technicians always have the right items in their vans or nearby warehouses. You can also track inventory consumption during service appointments and automatically update the inventory levels and costs. If a technician needs an additional part that is not in stock, they can create an inventory request from their mobile device and get it approved and fulfilled by a dispatcher or a warehouse manager. You can also track inventory transfers between locations and technicians and return orders for defective or unused items. Additionally, you can monitor the shipment status of your inventory items and receive notifications when they are delivered or delayed. Salesforce Field Service allows you to optimize your inventory management and reduce costs and waste.

- **Integration and core platform capabilities**
  Salesforce Field Service leverages the power and flexibility of the Salesforce platform to extend capabilities that meet the custom needs of your organization. You can use the Salesforce API to connect your field service data with other systems and applications, such as route optimization tools, asset tracking devices or inventory databases. You can also use the platform features to create customized alerts, notifications and workflows to automate your field service processes and improve efficiency and quality. Moreover, you can customize reporting and dashboards to monitor and analyze your field service performance and metrics and gain a 360-degree customer view for insights and recommendations for improvement.

Challenges of Field Service implementations

Implementing Salesforce Field Service requires careful planning, coordination and execution. Field service management spans multiple organizations and systems and requires a holistic design approach that considers people, processes, data and technology to maximize success.

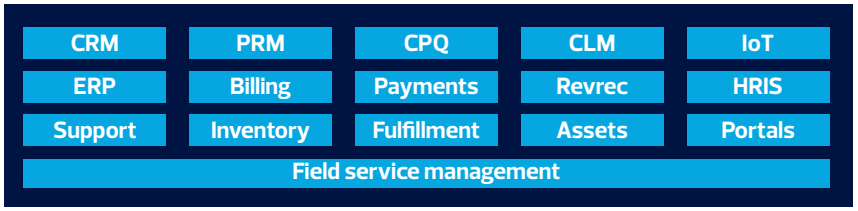
Crossing organizational silos

Salesforce Field Service needs to align with the goals and expectations of multiple stakeholders, including sales, operations, fulfillment, customer service, finance and compliance. These stakeholders all interface with, share requirements with, and depend on the field service team. Therefore, understanding the shared and overlapping requirements and dependencies of each stakeholder group is crucial, as well as ensuring that the field service solution meets current and future needs.

Crossing system and data silos

Salesforce Field Service needs to integrate with other applications, systems and data sources that are essential to field service operations. These include CRM, ERP, CPQ, CLM, IoT, billing, payments, revenue recognition, HRIS, customer support, inventory, fulfillment, assets, portals and more. These systems must seamlessly connect with field service to provide a single view of the customer and to create efficiencies through automation. For example, field service agents should be able to access customer information, contract details, product specifications, inventory levels and service history from one platform. Likewise, their activities should trigger updates and actions in other systems, such as generating invoices, tracking revenue, managing assets and providing feedback.

IoT enables field agents to service customers proactively, which lowers downtime and extends the product life of assets.



Business needs before technology

As any experienced business leader knows, technology does not by itself solve business problems. To maximize the return on investment, it is important to organize the business strategy and process so that technology can align and enable them. Accomplishing these goals includes conducting a current-state assessment and defining a target operating model before selecting and configuring the technology. These processes ensure that a proper vision and road map can be created so that each phase during the implementation is accretive toward the common goal, minimizing rework and maximizing ROI.

Software systems require structure, and organizing the service resources by service territories, skills, certifications and availability is a key activity before or during implementation. Assets and inventory should be structured by appropriate attributes such as type, location and status. Schedules, work orders, entitlements, SLAs, billing and revenue recognition should also be rationalized. These steps will help create a coherent and consistent data model that supports the field service functionality and provides seamless integration with other applications.

Customer experience and mobile-first execution

Salesforce Field Service provides powerful capabilities for your business, but a critical component to the success of the project is focusing on the experience of the field worker and customer. The more successful the customer and field worker, the more the business benefits.

Optimizing the client experience includes providing online scheduling, reminders and day-of notifications. First trip resolution, clear trip reports with on-site images, and prompt and clear invoicing enhance customer satisfaction and loyalty. On-site visits must be highly efficient, and empowering the field agent to represent your company properly is essential to a strong brand. Even more powerful is when the field agent can address any open issues, provide advice to improve usage and educate customers on additional products and services that would provide benefits.

Working with RSM

As the leading Salesforce advisor for middle market companies, RSM's consultants have deep experience and extensive knowledge of all Salesforce solutions. When your company works with RSM, we'll guide you through a Salesforce implementation and provide timely insights and advice that enable you to make the most of your investment in Salesforce. We're proud to be the first-choice advisor to the middle market and deliver the power of being understood.

The clients we serve are the engine of global commerce and economic growth, and we are focused on developing leading professionals and services to meet your evolving needs in today's ever-changing business landscape. Our purpose is to instill confidence in a world of change, empowering our clients and people to realize their full potential.

RSM US LLP is the U.S. member of RSM International, a global network of independent assurance, tax and consulting firms with 57,000 people in 120 countries.

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