

CASE STUDY

**Improve Field Service Operations and
Customer Service with Salesforce**

softserve

Streamline workflow processes, gain a 360-degree overview for the entire team, improve customer interactions, and manage your inventory seamlessly.

When you're like our client—a US-based financial services tech company providing brokerage, investment banking, and advisement—success depends upon efficient field service operations and consistent, high-quality customer service.

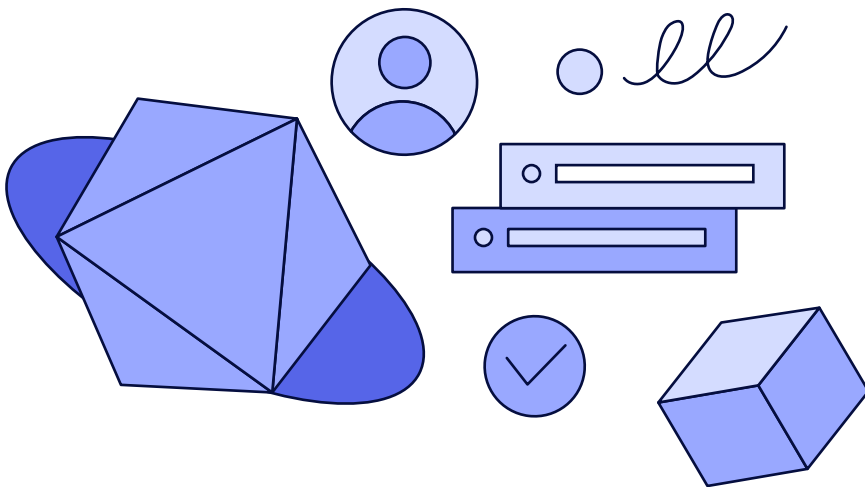
Our client struggled on both fronts because of siloed field service systems. This lack of collaboration within and between the field service department and other departments led to:

- Poor workload distribution among technicians
- Lack of personalized customer experience
- Inefficient inventory management
- Problematic CI/CD configuration

SoftServe's experts were tasked with implementing and optimizing Salesforce functionalities such as service resource and work order management, service appointments and reports, inventory management, and the dispatcher console to maximize and improve field service operations.

Developing a solution powered by Salesforce's field service system, our team met the client's precise business requirements while creating a best-in-class experience for customers. Our experts' four areas of focus included:

1. Identifying key improvements with an end-to-end review of the client's business processes using custom-configured Lightning web components.
2. Implementing Salesforce's intelligent field service solution to maximize productivity while maintaining excellent customer service.
3. Replacing the existing customer portal with Salesforce Community Cloud to overcome its inability to scale and reduce severe performance issues.
4. Redesigning and enhancing the client's existing Service Cloud configuration.



The numerous Salesforce changes and enhancements implemented by the SoftServe team seamlessly connected our client's systems, optimized business processes, and provided powerful, customizable reporting. It drove an immediate positive business impact, including:

(1) Improved Operational Workflow

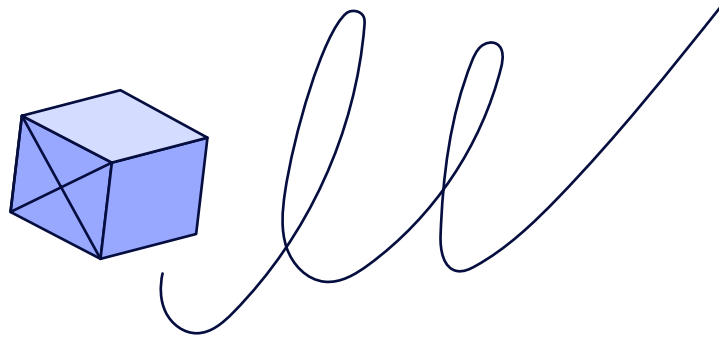
Smarter workflow management using intelligent work order scheduling and assignments led to a **2x increase** in KPIs. Automated workflows reduced tedious manual work and human errors. It also significantly improved the percentage of times a technician fixed an issue on the first visit.

(2) Transformed Digital Experience

Having a "single source of truth" with a 360-degree overview accessible by tenants, technicians, vendors, dispatchers, and management increased both customer and field operations team satisfaction.

(3) Increased Customer Personalization

Customers gained access to self-service support options and real-time issue resolution tracking.



(4) Streamlined Operations Management and Reporting

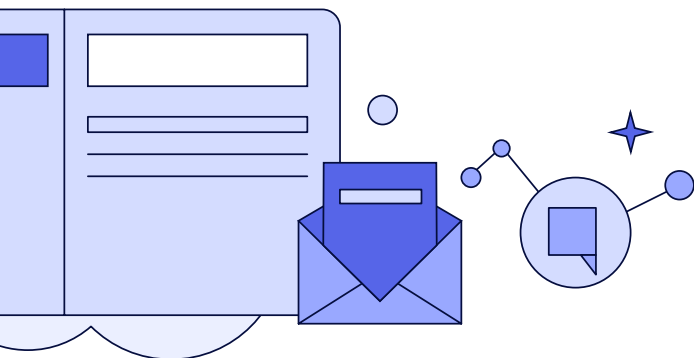
Technicians, vendors, dispatchers, and management benefitted from omnichannel communication with intelligent case routing, including case capturing and comprehensive customer analytics.

(5) Overhauled Inventory Management

With effective inventory management, field technicians are always supplied with the right tools when they need them to finish the job

SoftServe's expertise ensures our client gets the most from Salesforce's functionalities, creating a more effective and efficient field service operation.

LET'S TALK about how SoftServe can optimize your field service operations with Salesforce so you can streamline your business processes and provide exceptional customer service.



ABOUT US

SoftServe is a digital authority that advises and provides at the cutting-edge of technology. We reveal, transform, accelerate, and optimize the way enterprises and software companies do business. With expertise across healthcare, retail, energy, financial services, and more, we implement end-to-end solutions to deliver the innovation, quality, and speed that our clients' users expect.

SoftServe delivers open innovation, from generating compelling new ideas, to developing and implementing transformational products and services.

Our work and client experience is built on a foundation of empathetic, human-focused experience design that ensures continuity from concept to release.

We empower enterprises and software companies to (re)identify differentiation, accelerate solution development, and vigorously compete in today's digital economy. No matter where you are in your journey.

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