FIELD SERVICE LIGHTNING

Managing Your Mobile Workforce The Smart Way

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INTRODUCTION

Since the 15th of March 2016, Field Service Lightning (FSL) has been available as part of Service Cloud from Salesforce. It has been designed specifically for companies with mobile employees and/or contractors.

Handling a workforce that is constantly on the move is challenging for most businesses. Without some sort of field service management system, it’s virtually impossible to keep track of mobile workers.

Organising schedules, vehicles, deliveries, mobile workers, etc. without an automated system to handle this can become entirely unmanageable.

There is a reason 68% of service executives agree field service is an important element of their customer experience strategy. With organisations now delivering on-site services to customer locations, this data feeds directly back into Salesforce and provides a 360-degree view of the customer, enhancing the experience for all involved.

We wanted to create an eBook to assist executives who are investigating a Field Service Management system, as well as provide a guide to users who are starting out on their FSL journey.

We’ll take an in depth look into FSL, how it works and why it is the right field service management tool for any business with field workers.
WHAT EXACTLY IS ‘FIELD SERVICE LIGHTNING’?

FSL is the talk of the town and for good reason. There is no other field service management tool as powerful, advanced and as configurable as Salesforce FSL. FSL allows organisations to connect with their workforce and deliver intelligent and productive on-site service.

Why is the spotlight now firmly on FSL?

For one thing, customer service. As discussed in our blog post on Customer Service, customers expectations from interactions with businesses have increased dramatically.

Another reason FSL is getting so much traction is due to the streamlining of complex processes. The difficult process of tracking employees, stock, etc. can be solved with FSL.

FSL empowers service personnel through improved communication and increased efficiencies, as well as provides mobile support for on-the-go employees.
Field Service Lightning can be broken up into 3 sections:

1. Core Field Service Lightning features - To ‘turn on’ Field Service Lightning, the administrator must enter the setup menu, search for ‘Field Service’ in the ‘Quick Find’ box and click the toggle to enable. Once switched on, an Admin can configure the core features and set-up schedules, appointments, set up the mobile app and deploy it to the mobile workforce. Once completed, they will be able to start tracking inventory and analysing field service data. A suite of objects within the setup menu is automatically enabled also.

2. Scheduling & Route Optimiser - Once FSL is turned on, it’s time to start creating schedules and optimising routes (‘Route Optimiser’ requires an additional service cloud license).

   In FSL, you can see a comprehensive overview of schedules and appointments, as well as an interactive map. You can also see in real-time where field employees are located within the Gantt Chart provided.

   The main features of field service lightning are the ‘scheduling’ and ‘optimisation’ capabilities. Users can now efficiently automated schedules - create, define and set up rules & conditions.

   Agents & dispatchers can auto-generate schedules and appointments based on the needs and location of the workforce. “Work Rules” and “Policies” are a set of rules and objectives that guides the schedule optimizer in its decisions. These can consist of skill levels, locations, work hours, overtime reduction and even customer preference.
The ‘Group Nearby’ feature.

Take an example of a field rep who checks store locations for products. This is for field reps that get through appointments quicker than planned and have large gaps in between appointments.

The dispatcher can run the ‘Group Nearby’ feature to search for any appointments nearby that have not been completed yet.

Taking into account location and time, it runs the calculations and automatically assigns more appointments to free time space that can be achieved - amazing right!

3. The Mobile App - Users can now view schedules, check work orders, client addresses, and access maps to reach their destinations on their mobile devices. In terms of functionality, users can also update stock lists, report on product shelf placement, competitors and log work.

The app also has many features with the ability to work offline. Syncing and updating all tasks, etc. completed when connectivity is back.

Use Chatter to correspond/collaborate with others, access knowledge articles, push notifications and adjust routes in real-time from the app.

From the information when visiting locations, Agents and Administrators can run reports and compare products, locations, etc.

View a live demo of Field Service Lightning Mobile right here.
There are generally 4 different types of users.

- **Administrator** - These are usually the users that Field Service Lightning begins with. They install FSL, configure and setup the features and user permissions.

- **Agents** - The Agents deal directly with customer complaints, questions, queries and take customer service calls. Using work orders, they request the field service appointments.

- **Dispatchers** - Dispatchers generally organise the schedules and manage appointments.

- **Mobile Workers / Users who make service calls** - These are the employees who are customer-facing, out in the field making the service calls.
FEATURES & BENEFITS OF FSL

• **Optimise & Schedule** - FSL optimises time and routes for employees visiting multiple locations on a specific day. Schedules are run analytically and coordinate with a set of policies and rules to get the most optimised route to complete work.

• **Efficiency & Accuracy** - With FSL, employees can manage inventory accurately and efficiently. Field workers can input product levels and request the product directly through the FSL app. Employees can also scan products and barcodes with their phones.

• **Customer Service** - With features like capturing a customer signatures on the mobile app, reps can easily return reports quickly with only a few clicks. When your service is fast, efficient and accurate, your customers are not only going to be happy, they’re going to be impressed and tell their acquaintances.
IMPLEMENTING & USING FIELD SERVICE LIGHTNING

Implementation Preparation

Thinking your company might need Field Service Lightning? Here what you can do to prepare:

- Take a Trailhead and get up to speed.
- Plan & understand your requirements, territories and specifications
- Know that scheduling and optimising is an ongoing process and continuous journey
- Talk with a Salesforce Consultant like us - Is it difficult to implement? Is a Salesforce Consultant required?

So, you’ve enabled FSL in your Salesforce Org, now you need to install it... Wait, what?

Now that you’ve switched Field Service on, you need to install the managed package to gain access to the dispatcher console, scheduling tools, a range of custom objects, as well as the Guided Setup. Click here to see how to install the managed package.

Something to note:

Once you have installed the managed package, there will be two new apps included in the app launcher.

- The Field Service app is for dispatchers. The Field Service tab in this app leads to the dispatcher console.
- The Field Service Admin app is for administrators. The Field Service Settings tab in this app leads to the managed package settings.
Using FSL for Time & Attendance of field workers

No need to keep buying multiple licenses across different products. You only need one system for your Field workers, and that’s Salesforce. While some may think of FSL as more of a route scheduler and optimiser, it is also an excellent ‘Time & Attendance’ system for your field workers.

Field workers can record their location, travel time, mileage (odometer readings), tasks and breaks in the FSL app. FSL also allows users to upload photos, information, and notes etc. while on-site and offline. You can also see field workers most recent location in real-time on the Gantt Chart.

FSL also has a ‘Resource Time Sheets’ option available. What’s impressive is that within the resources time sheets section, you can create ‘Resource Absences’. Optionally, you can give these resource absences a Gantt label (eg. ‘Vacation’) which will display in the Gantt Chart.

When running statistics and optimising, FSL’s route optimiser will not assign any appointments for this user during the absence time period.

You can get complete details on how to set this up in the ‘Complete Guide to Field Service’ PDF from Salesforce.
ROI & time-savings really are that high!

Being realistic, it is not possible to run complex statistics and route optimisation formulas efficiently and accurately by hand, excel sheets, etc. For employees to calculate and run these statistics would take days, if not weeks. By that time, details could be completely different and all the work becomes irrelevant.

Yet, FSL can create an optimised schedule in less than 1 minute. By visiting extra locations, field agents can accomplish more work and increase their productivity. One of our customers went from previously visiting 4–5 sites, to 7–8 sites a day. In some circumstances, it went all the way up to a whopping 12 sites. That means they were visiting at least 2 more locations a day, which amounts to over 500 extra visits a year per person (pending location, preferences, route etc of course). Plus, FSL handles real-time changes and dispatchers can update on the fly.

FSL stats speak for themselves. Here are a few stats to give you an idea of the potential savings you can achieve:

- 30% Reduction in travel time
- 40% Reduction in Field service Costs
- 50% Reduction in cancelled jobs Costs
- 72% of executives use field service management software for faster case resolution
YOUR FIELD SERVICE CHECKLIST

When evaluating a Field Service Management system, you need to investigate how your organisation is currently tracking and monitoring your field employees and if the process is performing at an optimal level.

For this reason, we have put together an optimised checklist for implementing FSL.

1. Easy, Uncomplicated Service to Customers

FSL works on a unified platform where employees and customers can easily interact on their own terms. With FSL, field workers can provide faster and smarter on-site service. Not only will your customers be impressed, but they will also be delighted with your efficiency levels.

Fast, efficient and accurate service makes for an unforgettable experience. Easily distributing notifications, stock updates and other vital information will also increase customer satisfaction.
2. Ensure Teamwork / ‘Team Effort’ Atmosphere

Clear communication is at the core of every successful business. Communication between teams needs to be accurate and concise. Features like Live-Agent Web Chat, Chatter and email integration allow everyone to start singing from the same hymn sheet and deliver exceptional customer service. Start driving new service standards and get the best from your team.

3. Easy-to-use Tools and Resources

Complicated systems are not convenient for workers who are out in the field. Most importantly, the FSL mobile app is very user-friendly. Critical functionality, like updating an Account record and capturing signatures are easy to get to.

4. Automate & Optimise

Automation might be one of the biggest improvements to efficiency in your company. Automating routes & scheduling in FSL should be high on your checklist. (See our post ‘5 Things to know before implementing FSL for more information.

5. Identify Risks & Control Issues

When using a platform like Salesforce, it’s easier to find the root cause of issues relating to internal processes or customer accounts.

- **Visibility** - Dispatchers need to know where their team are at all times. Visibility is imperative to the productivity of a workforce, as well as the safety of the employees. Stop isolated feeling within the field employees.
- **First-time fix rate** - Utilising a tool like FSL with intelligent automation, dispatchers can assign tasks with expertise levels, notes and any specific time requirements. When a schedule is generated, it will assign these tasks to the field workers who meet the specific requirements.
**FINAL FSL TIPS**

- **Default Speed** - In the Scheduling Settings, the default vehicle speed is set to 15mph which can lead to slower than expected travel time. This can be updated in the settings by the Admin.

- **Licenses** - A separate user license is required for the Route Optimisation. Once the user license is purchased, it needs to be applied to use the route optimiser.

- **Scheduling and Optimisation is an ongoing process** - It’s important to understand that optimisation is a journey and requires ongoing refinement - it’s not just set it and forget it. Locations, employees, vehicles etc constantly change, so FSL takes in new information and continues to optimise routes and appointments.

- **Caching** - One thing to note is that the amount of data cached is limited. When looking at workflows, it is important to note that no more than two levels away will be cached. This can be significant depending on what records you are working on. It is best to try to pre-create as many records as far in advance as possible. Salesforce is constantly improving the functionality of the app and we are sure it won’t be long before this is no longer a drawback.
About Pexlify

Apex + Simplify = Pexlify

Pexlify is a Salesforce Platinum Partner and a leading provider of Salesforce.com solutions across Europe.

As with any implementation of Salesforce, a consultant like Pexlify - with FSL experience - can benefit larger companies with complex processes.

Being Salesforce experts, we can leverage their experience and configure and implement FSL to the highest standard while staying within time-constraints and budgets.

We pride ourselves on our technical, project and business analysis skills which enable us to solve the most complex business requirements. We work closely with customers to unlock value and build strong, lasting relationships that help them succeed using Salesforce - the world's #1 CRM platform.
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