

A Brief Introduction to Field Service Lightning

Jenny Bamber
Salesforce Administrator and MVP
Jenny.bamber@desynit.com
@jenny_bamber



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Who has heard of Field Service Lighting?

Agenda

- The Customer Journey
 - Then, now, the expectations and the future
- Salesforce for Service
 - The customer service platform
- The Birth of Field Service Lightning (FSL)
 - Work Orders, Dispatcher, Service Appointments, FSL mobile app
- Demo
- Questions

Service Operations Are More Complex Than Ever.

Organisations face new challenges with the rise in customer expectations and substitutes



High staff turnover

Focus on operational excellence or innovation?

Engaging on new channels

Who is responsible for end-to-end service?



Transforming Customer Experience is a Journey

The connected world has shattered expectations for customer service



75B

connected things by
2020

80B

messages/day*

Cloud

Social

Mobile

IoT

AI

The Customer Gap

Disruptors are driving customer demand for faster, smarter service engagement across channels



Cloud
Social
Mobile
IoT
AI



The Age of the Customer

Connect to your customers in a whole new way



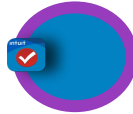
Intelligent
Communities



Predictive
Marketing



Assisted
Service



Guided
Sales



Unified
Commerce



Actionable
Analytics



Smart
Apps



Connected
Products

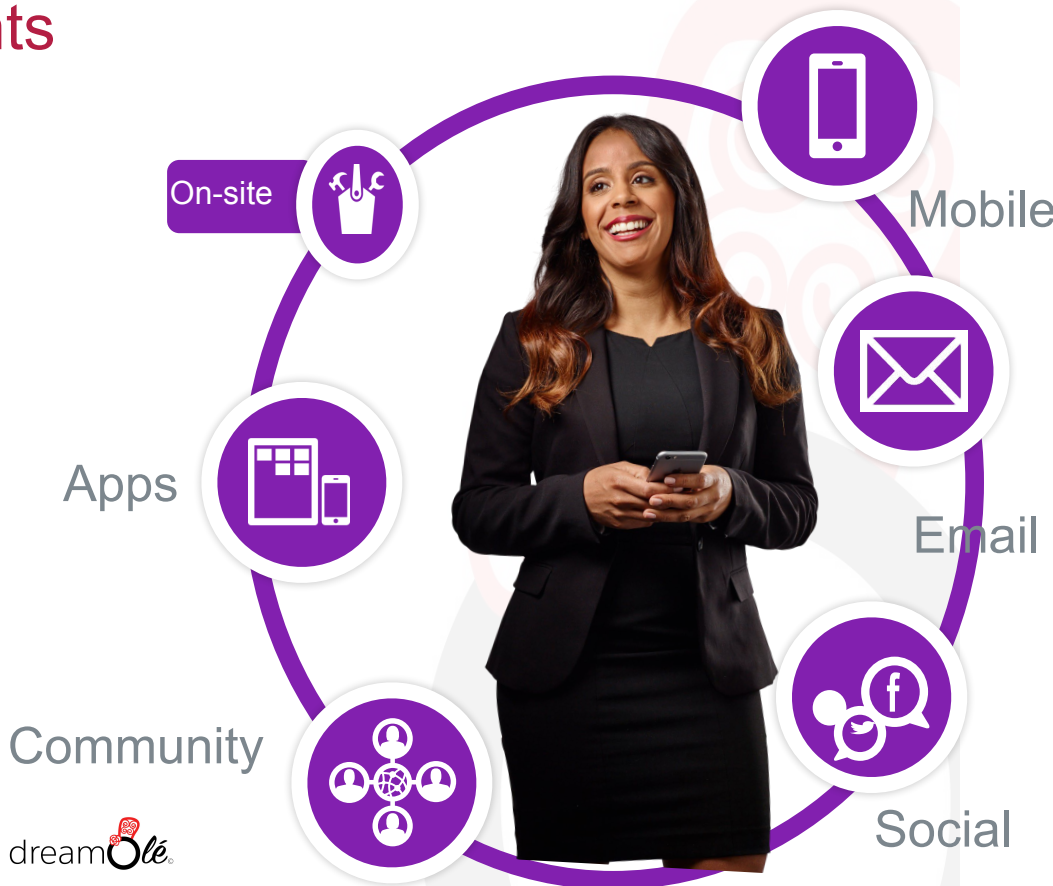
Customers Expect a Connected, Personalized Experience Across Service Engagements

92%

of executives believe they **need to adapt their service models** in order to keep up with customers' needs

90%

of execs say that **improving field service performance is a top priority** for my organization.



Salesforce for Service

The world's first intelligent customer service platform



Personalised
Turn transactions into
1:1 service
conversations



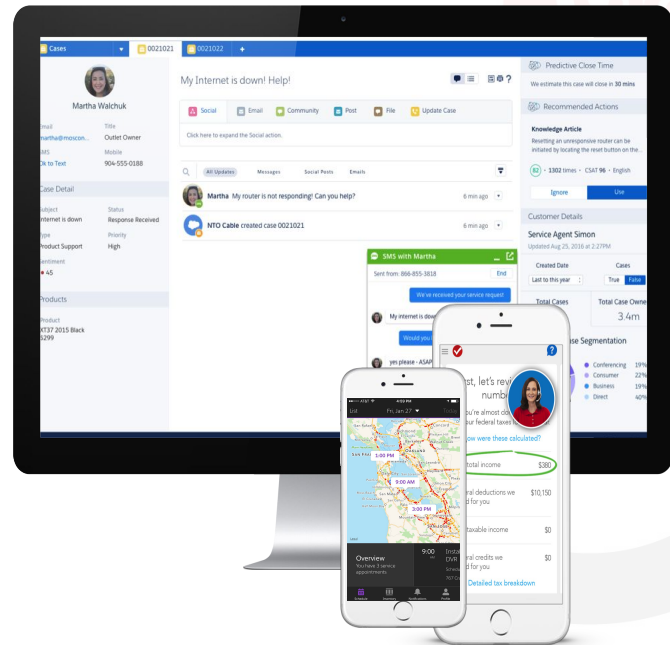
Productive
Make agents, managers
& mobile workers more
efficient



Predictive
Use AI & Intelligence to
get ahead of customer
needs



Connected
Align on one intelligent platform



How Do You Deliver Smarter, Connected On-Site Service?

Delivering exceptional customer service in the field presents additional challenges

No unified view of customers or service interaction/Disconnected systems

Manual/paper-based scheduling & tracking of resources

No visibility into mobile employee workload & schedules

Antiquated or lack of mobile functionality

No visibility into reporting or data

Inability to track parts used or in the warehouse



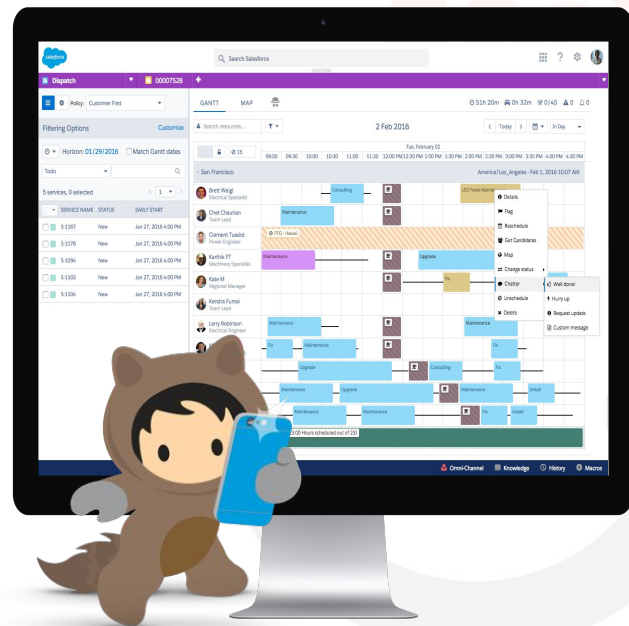
Results in:

- Poor resource allocation
- Low First Time Fix Rate
- Low mobile employee productivity/satisfaction
- High employee turnover
- High Costs
- Missed/Late appointment

Intelligent Mobile Service with Field Service Lightning

Connect your agents, mobile workforce, products, and customer on one platform

- Dedicated, Offline-First Mobile Experience
- Intelligent Scheduling, Dispatch & Optimization
- Enhanced Productivity & Customer Engagement



Work Order Management

- Track Maintenance Jobs
- Integrate with Standard objects
- View knowledge articles
- Work Line Items to deliver jobs details.



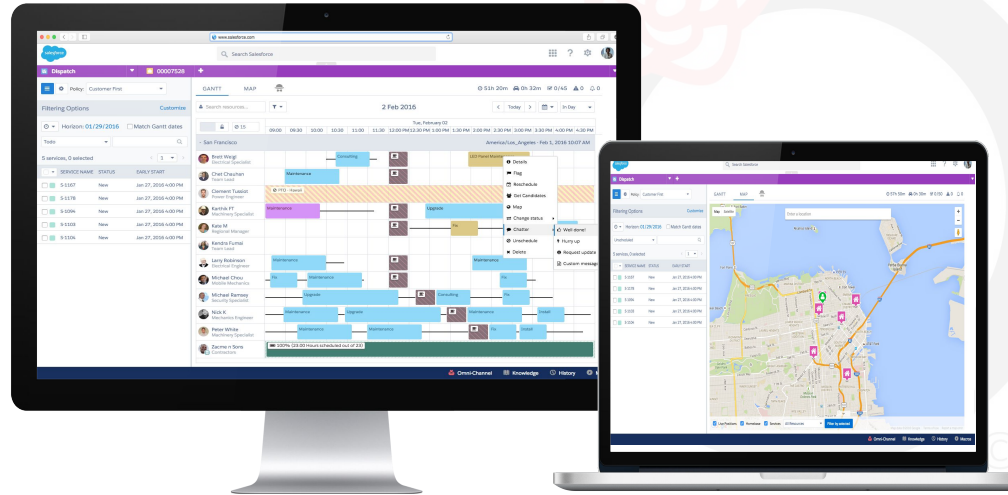
Dispatcher Console

Seamlessly manage and monitor employees in the field

- Route Appointment to correct Resource
- View all appointments
- Customise your view
- See alerts
- Track and Monitor service delivery in real-time

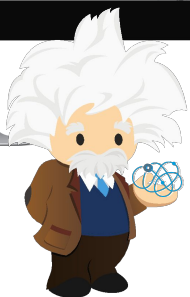
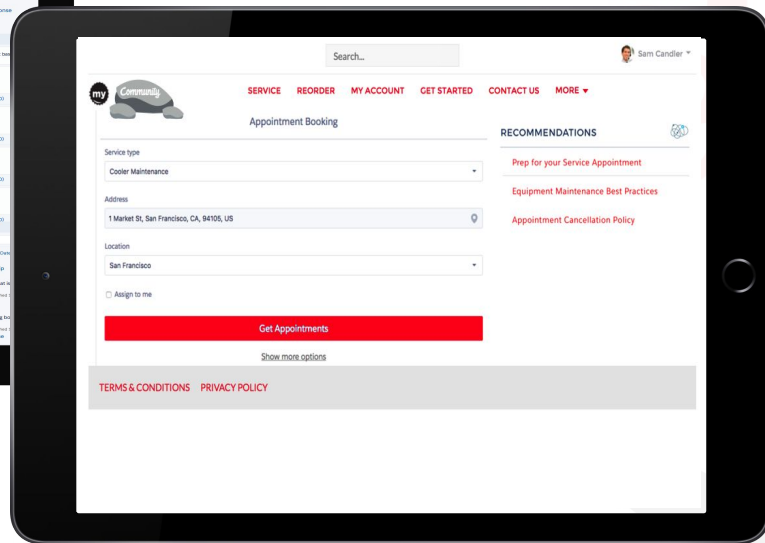
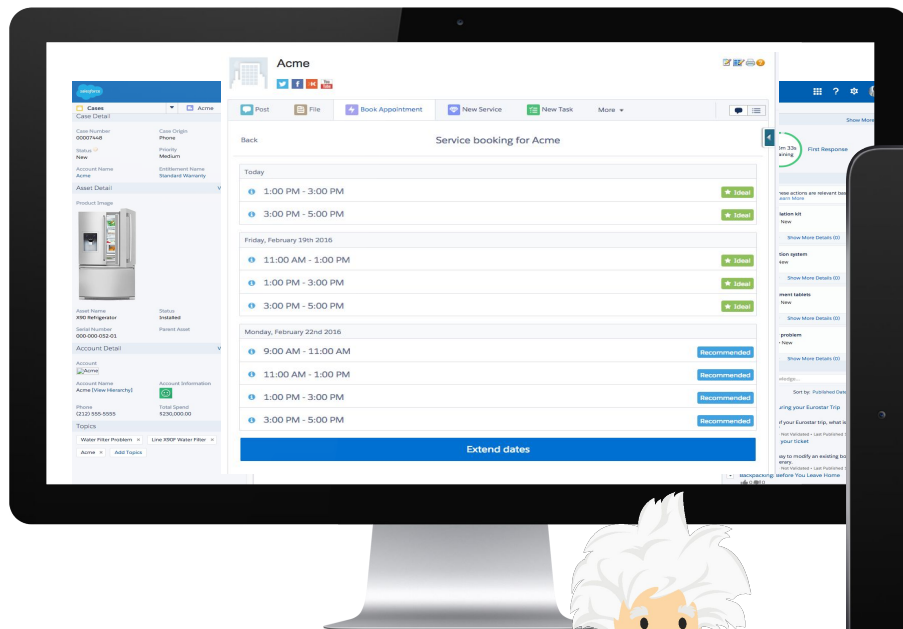


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Intelligent Appointments & Resource Scheduling

Automatically assign and schedule work based on business rules

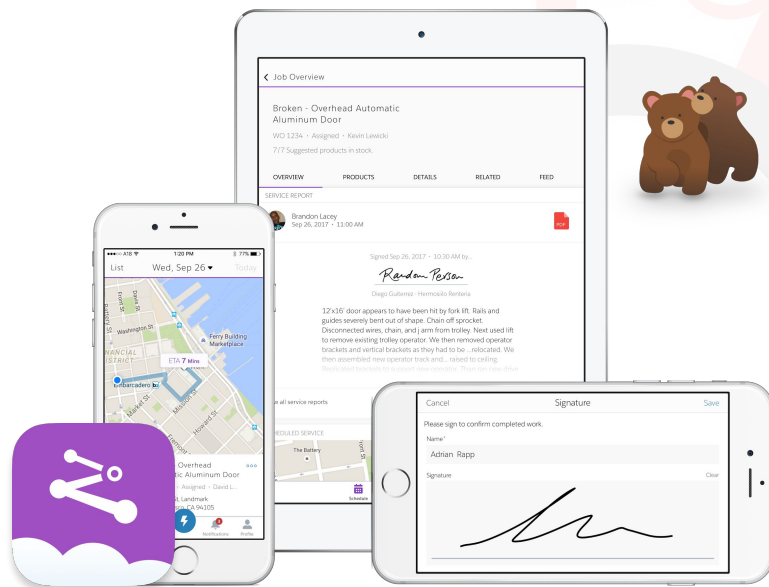


Dedicated, Offline-First Mobile App

Customizable, easy-to-use app built with mobile employees in mind



- View SAs on a map and instantly access customer and job information
- Collaborate with experts and tap into knowledge articles to help get the job done
- Input job updates and manage parts & inventory even without network connectivity
- Scan equipment barcodes and capture customer signatures for service reports



Parts & Inventory/Van Stock Management

Manage the flow of parts and inventory by location and mobile employee

Visibility into inventory levels
at different locations

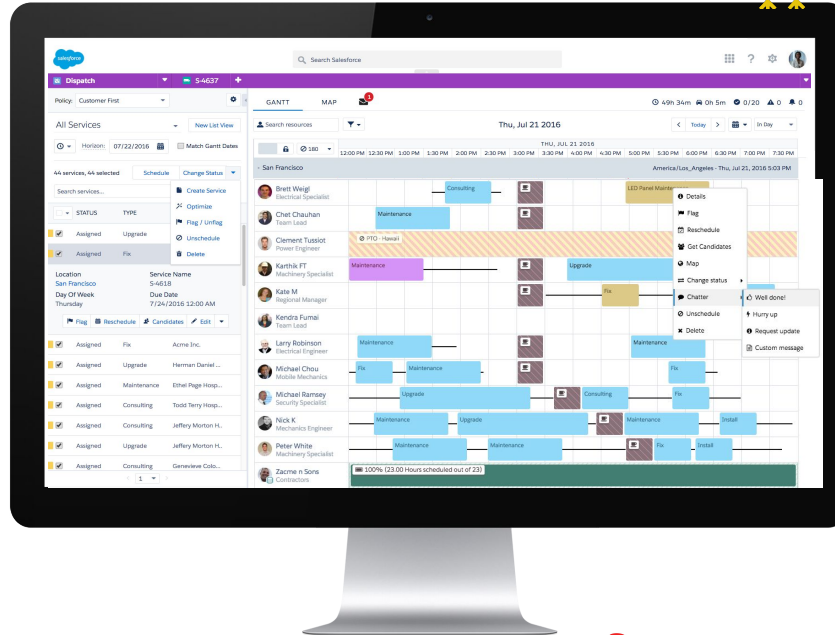
Model any geographic area
or resource as an
inventory location

Add required parts to a work
order



Advanced Optimization

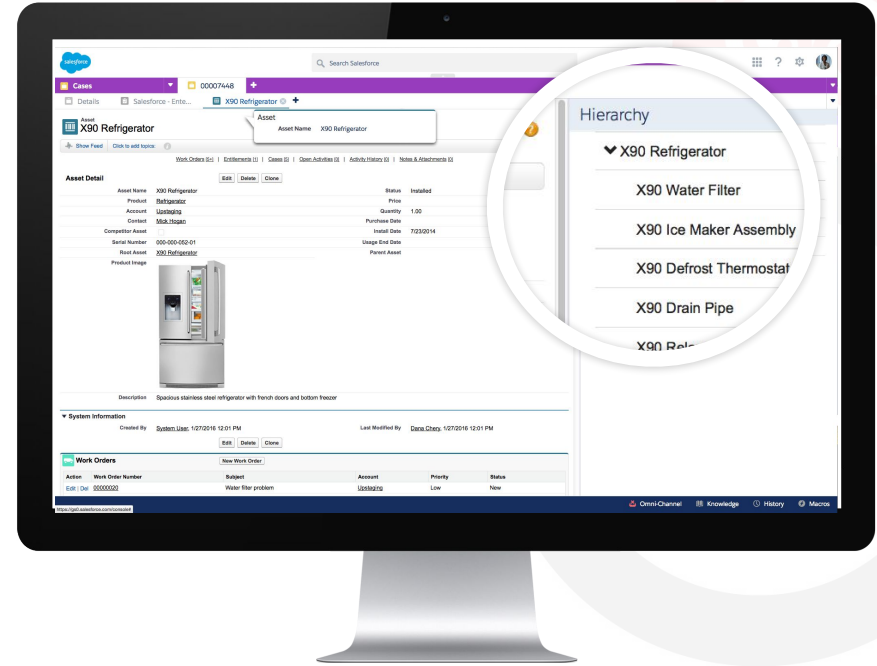
Maximize coverage of customers' needs with the existing resources



Advanced Asset Management

Manage complex assets with the multi-tiered asset hierarchy

- Track information about all of your customers' products
- Get insight into which customers have a competitor's product
- Leverage asset hierarchy to track products made up of several parts all in one view

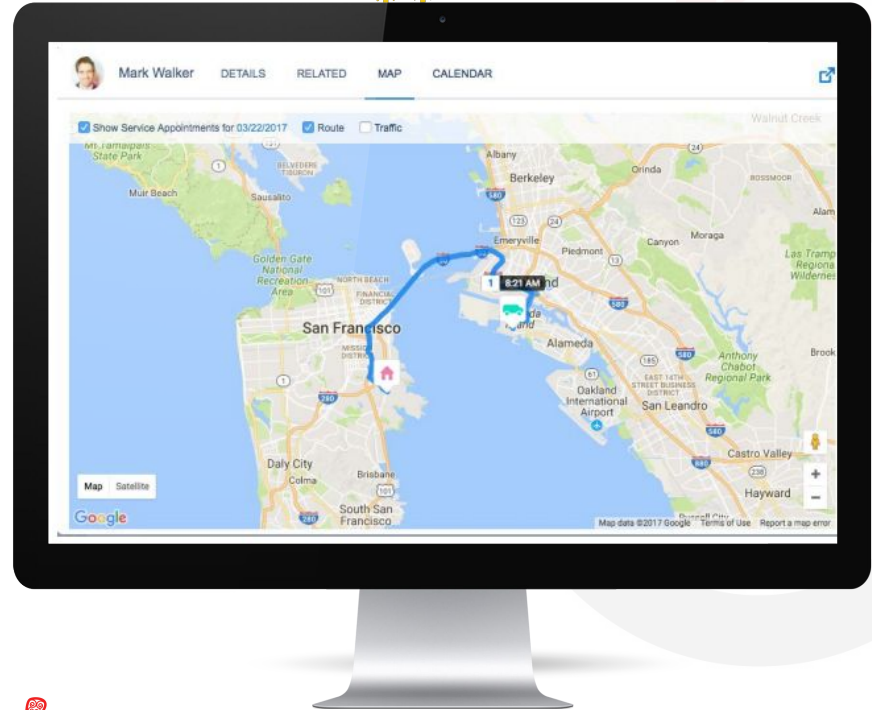


It just keeps on getting better!

Improve your travel time with Street Level Routing

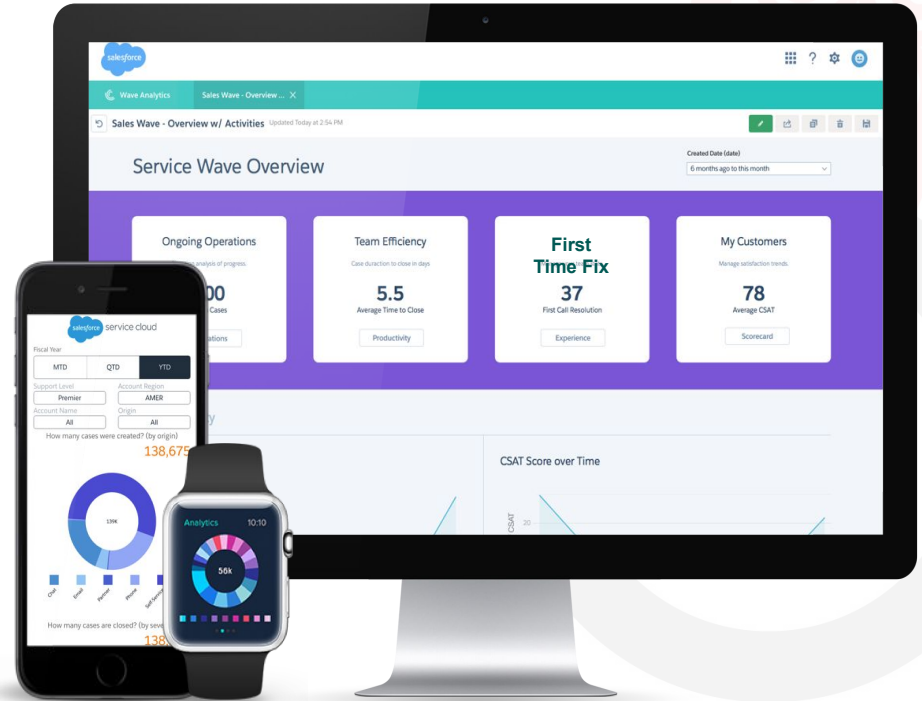
Routing allows you to calculate the following:

- Travel time – meaning how long it will take the worker to arrive at a location.
- Travel distance – from one location to another - minimize the worker travel time and distance from one work order to another.



Real-Time Reporting & Analytics

- Integrate all your business data from multiple systems
- Drill down into data on the fly from any device
- Complete visibility into agents, dispatcher, technicians, and partner performance



DEMO



Learn More with These Great Resources!

Field Service Lightning

Today's field service management systems can be challenging to manage, agents, dispatchers, technicians, and managers are held back by silos and disconnected processes. They are slowed down by inefficient work systems that can't keep pace with fast-changing businesses and industries. Not only does this bottleneck productivity among technicians in the field, it also brings higher costs and poorer customer experiences. In this new connected world, customer experience is now the #1 factor that your customers are using to make decisions about products when you compete. This means your products and your brand are as good as the complete customer service you provide. That complete customer experience can only be delivered when your company connects employees, processes, and people on one platform. Giving agents, dispatchers, mobile employees, processes, and people a view of the customer, a business into case, and access to all the information needed to solve the problem anytime and on any device.

Challenges facing field service management today

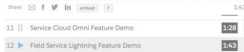
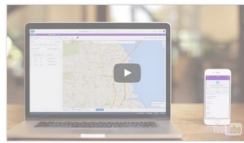
1. Siloed departments

Lack of communication between departments makes it difficult for mobile employees to deliver amazing, world-class customer experiences. Service teams and dispatchers are disconnected and disconnected, which leads to lower employee productivity, higher costs, and poorer customer satisfaction.

3. Disconnected

Watch the Field Service Lightning demo.

Questions? Call us at 1-800-667-6389.



SMARTEST CUSTOMER SERVICE ON THE ROAD

"At center to the field, Field Service Lightning is the best way to deliver world-class customer service during or after any other functions, you can:

Best Practices for Transforming the Customer Experience with Field Service

Questions? Call us at 1-800-667-6389.



As technology transforms how companies are interacting with their customers, field service in particular faces extensive challenges in its model to meet the needs and expectations of the customer.

Getting Started with Field Service Lightning

UPDATED July 2016

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- 1.4.3 Assign Skills to Resources for Specified Time Periods
- 1.4.4 Auto-Schedule Services for a Given Time Period
- 1.4.5 Quickly View a Resource's Scheduled Services and Absences

About Field Service Lightning

- Available for additional cost in Enterprise, Performance, Unlimited, and Developer Edition.

Available in Salesforce Classic and all versions of the Salesforce1 mobile app.

Field Service Lightning is your field service hub in Salesforce. Schedule services, track location, and resolve customer issues in one seamless, mobile app.

Field Service Lightning includes a variety of features that serve the needs of your business.

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Datasheet

Demo Video

eBook

User Guide



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Gracias

Alguna pregunta?

