

**T**oday's field service management options can be challenging to navigate. Service agents, dispatchers, technicians, and managers are held back by siloed teams and disconnected processes. They are slowed down by inefficient scheduling and systems that can't keep pace with fast-changing businesses and industries.

Not only does this lead to lower productivity among technicians in the field, it also results in higher costs and poor customer experiences. In this new connected world, customer experience is now the #1 factor that your customers are using to make decisions about your products versus your competition. This means your products and your brand are only as good as the complete customer service you provide. That complete customer experience can only be delivered when your company connects employees, processes, and systems on one platform. Giving agents, dispatchers, mobile employees, and managers a 360-degree view of the customer, full context into cases, 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 key departments makes it difficult for mobile employees to deliver amazing, on-site customer experiences. Service teams and department processes are disconnected, which leads to lower employee productivity, higher costs, and poor customer satisfaction.

### 3 Disconnected from CRM

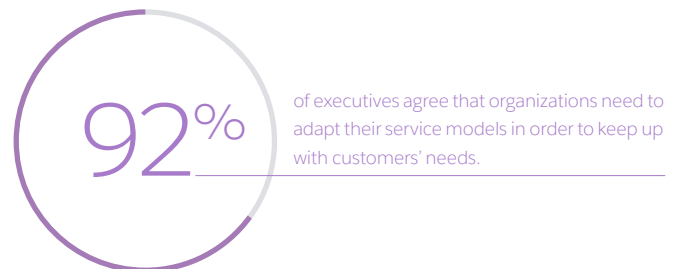
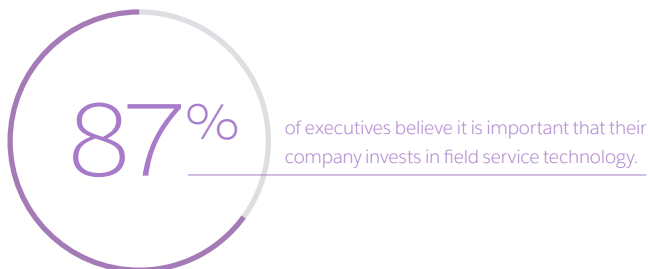
Employees across the company aren't connected to all the data they need to quickly resolve service issues. They are too often bogged down by massive amounts of disparate information trapped in paperwork, email, spreadsheets, or on-premises systems that are hard to track. These outdated processes are difficult to scale and keep information secure. They also limit visibility into how and where service technicians are being assigned, and don't pull in or analyze data needed to make critical service decisions.

### 2 Poor resource allocation

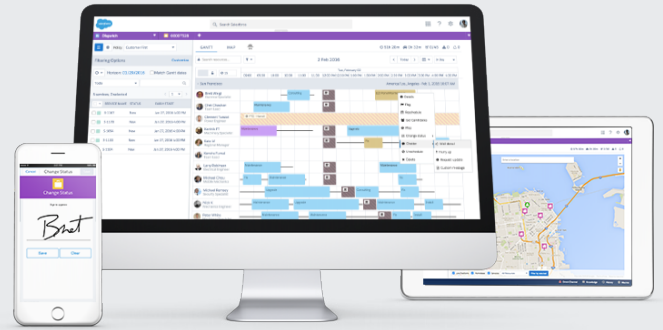
Field service depends on excellent time management and efficient resource allocation. With manual field service processes and disconnected systems, companies suffer from effectively sourcing technicians, assigning tasks based on skills, and tracking parts and inventory, leading to costly errors and use of resources.

### 4 Lack of mobile support

Traditional platforms are too rigid to keep pace with your changing business, and don't support employee collaboration across devices, making it difficult to put the right tools at your field technicians' fingertips. Mobile employees are struggling to access the right information.



From the dispatcher console, to smart scheduling, to the signature that closes the case, Field Service Lightning is ready to hit the road.



## Streamline operations across the entire service chain on one platform to deliver a connected customer experience with Field Service Lightning.

Field Service Lightning is built on Service Cloud, the world's #1 customer service platform; as such, it lets you connect your entire workforce on one platform to get a complete view of the customer and collaborate to optimize customer experience from the phone to the field.

With Field Service Lightning, you can transform the connected customer experience and equip your agents, dispatchers, and mobile employees with the tools they need to deliver a powerful customer experience anytime, anywhere, and via any mobile device.

### Create and track work orders.

Quickly create work orders on any case – right from Lightning Console for Service – to track repairs, standard maintenance, and other work in the field. Work orders can also be associated with accounts, contacts, entitlements, cases, or service contracts, and are accessible on any mobile device via the Salesforce1 Mobile App. Work order line items take work orders even further by letting you track details about the tasks required to complete the work order.

### View and manage jobs in real time.

Field Service Lightning Dispatcher Console lets dispatchers seamlessly manage and monitor your mobile workforce to improve the efficiency and productivity in the field. Now you can ensure the right job is routed to the right mobile employee, and immediately see alerts for issues that need attention and take action. The Dispatcher Console helps you automatically schedule bulk jobs with just one click, and track and monitor the service delivery in real time on a map or Gantt chart to give you better visibility and control of what's happening in the field.

### Access any information via any mobile device.

Mobility is an integral part of Field Service Lightning, and with the Salesforce1 Mobile App, service technicians can increase their efficiency and productivity in the field. The mobile solution gives technicians seamless access to critical information on any device, and uses automated processes to support a full range of field activities, from sending and receiving real-time job updates to managing work orders and speeding up manual administrative work. It even enables technicians to generate reports, and capture a customer's signature to confirm that the work is completed.

### Get advanced asset management.

Manage complex assets with the multitiered asset hierarchy. Track information about all of your customers' products, get insight into which customers have a competitor's product, and leverage an asset hierarchy to track products made up of several components in one view. Advanced asset management makes it easier to identify which parts of an asset need repair, helping field technicians deliver more accurate service, faster.

### Schedule work intelligently.

With Smart Scheduling, you can instantly book service appointments from Lightning Console and even allow customers to self-book an appointment at their convenience. Smart Scheduling increases employee productivity by automatically assigning appointments to the right technician based on time, skills, location, and business rules.

### Acquire real-time reporting and analytics.

With real-time reporting and analytics, you can integrate all your business data from multiple systems on one platform to give your agents, dispatchers, field technicians, and managers visibility into overall operational performance and field service KPIs. This key insight across service and operational data empowers service teams to take action to deliver a connected service experience. Access field service intelligence in the palm of your hand and drill down into data on the fly from any device to quickly identify existing problems or potential issues, and increase proactive support.

For More Information  
Contact your account executive  
to learn how we can help you  
accelerate your CRM success.

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