Project Title: Field Service WorkOrder Optimization

Team ID : LTVIP2025TMID31031

Team Size : 4

Start date : 3 June 2025

End date : 8 June 2025

2.IDEATION PHASE

In our project titled: Field Service WorkOrder Optimization

The ideation phase for the Field Service Work Order Optimization System involves identifying key challenges in field service operations, such as inefficient work order assignment, lack of real-time communication, and limited visibility into technician schedules and skills. Through collaborative brainstorming and analysis, the team generates ideas to leverage technology, such as robust databases, prioritization algorithms, and automated communication, to streamline operations, maximize efficiency, reduce costs, and improve customer satisfaction.

2.1 Brainstorming& Idea Prioritization Template:

Step 1: Team Gathering, Collaboration, and Problem Statement

Our team convened with the goal of identifying inefficiencies in Assemble a cross-functional team field technicians, operations managers, customer service reps, Salesforce admins, developers- Through collaborative meetings, online whiteboards, and use-case discussions, we collectively explored Collaborate through brainstorming sessions to identify pain points and generate ideas in field service work order management. We reviewed real-world operations and identified that

- Inefficient work order assignment
- lack of real-time updates like work order status, technician location
- Work Order Management
- Inventory Management

After several discussions, we clearly defined the core issue:

Problem Statement:

Identify key challenges and opportunities in field service work order management Define a clear and concise problem statement, such as Inefficient work order assignment and scheduling lead to delayed responses and decreased customer satisfaction. Lack of real-time updates and communication result in poor visibility into field service operations. Prioritize the problem statement based on impact, feasibility, and alignment with business goals.

Step 2: Brainstorm, Idea Listing, and Grouping:

The team conducts brainstorming sessions to generate a wide range of ideas for optimizing field service work order management, documenting all ideas without worrying about feasibility. Ideas are then listed and grouped into categories such as Automation, Real-time Updates, Communication, and Analytics & Reporting, allowing for a structured approach to idea evaluation and development.

- **Automation**: Automate work order assignment, scheduling, and notifications.
- **Real-time Updates**: Provide real-time updates on work order status, technician location, and arrival times.
- **Communication**: Improve communication between field technicians, customers, and operations teams.
- **Analytics and Reporting**: Generate reports and analytics to optimize field service operations.

From around 25–30 ideas, we grouped and shortlisted the ones thataligned directly with operational efficiency.

Step 3: Idea Prioritization

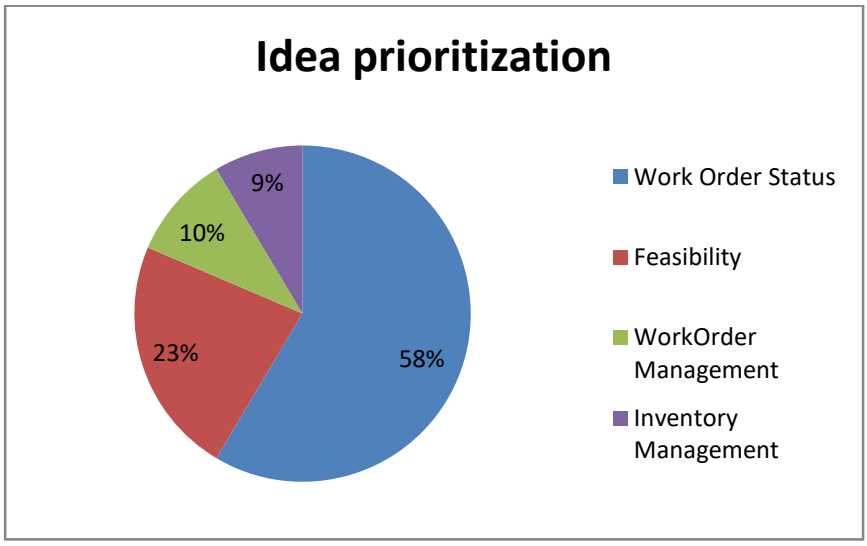
Each grouped idea was evaluated and prioritized ideas generated during brainstorming sessions

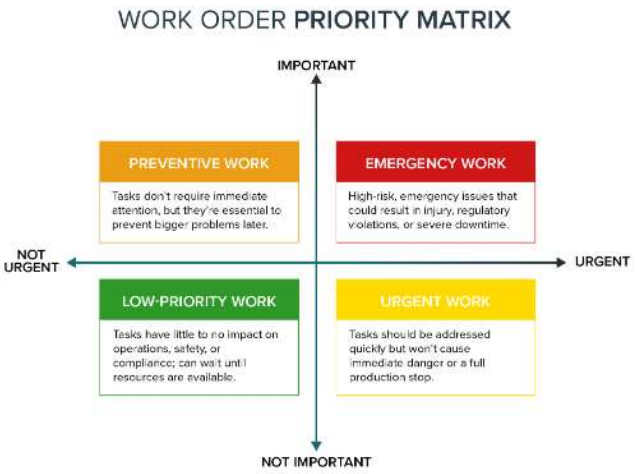
- **Impact on Field Service Operations**: How much will the idea improve field service operations?
- **Feasibility and Practicality**: Is the idea realistic and achievable?
- Alignment with Business Goals: Does the idea support business objectives?
- Potential Return on Investment (ROI): Will the idea generate significant returns?

Goal: Identify top-priority ideas that can drive significant improvements in field service work order management.

Top-Priority Features:

- **Automated work order assignment**: "Assign work order to nearest available technician."
- **Real-time tracking**: "Track technician's location and estimated arrival time."
- **Mobile app**: "Technician updates work order status from mobile app."
- **Customer notifications**: "Send SMS to customer when work order is completed."
- **Reporting and analytics**: "Generate report on average work order completion time."





2.2 Empathy Mapping- Empathize & Discover:

Empathy Map Canvas

An empathy map for field service work order optimization helps understand the perspectives of different stakeholders involved in the process, such as technicians, dispatchers, and customers.

Empathy Map forField Service WorkOrder Optimization

By stepping into the user's shoes, we ensured that our Salesforce Field Service WorkOrderOptimization features (formulas, flows, triggers, dashboards) directly addressed their key frustrations.

2.3Define the Problem Statements:

Customer Problem Statement Template

Field service operations are plagued by manual processes, disconnected systems, and lack of real-time visibility, resulting in inefficiencies, errors, and lost revenue. A centralized platform is needed to digitize workflows, ensure data accuracy, and provide actionable insights to optimize field service management, thereby enhancing efficiency, reducing errors, and improving overall performance.

Customer Problem Statement for field service

	I am...	Customer 1
	I am trying to ...	optimize field service operations.
	But ...	manual processes and disconnected systems hinder me.
	Because ...	of inefficiencies and errors, I lose revenue and productivity.
	Which makes me feel ...	frustrated and overwhelmed.