Salesforce Field Service WorkOrder Optimization

Scenario	Booking, scheduling, dispatching, completing, and following up on field service work order efficiently

	Entice	Enter	Engage	Exit	Extend
Steps	How does somsene initially become aware of this service or process?	What do customers and teaice experience as they begin the process?	What happens during dhe-actual service?	What do people exprience after service is done?	What happens after the entire process is finished?
Steps	• Client notices an issue an contacte to ppont tonari. website, charact, or ealh • Support agent creates cax in balestoace Service cloud • Work order is automati-cally generated	• Work order is assigned based on availabilty sith exti and location • Technician receives notification in Salesfonce fiield Service apv • Customer receives Sinall with service confirmation	• Technician travels to site • Technician updates (åt sliates to real nul-time (off mude. Started Complerant..... Completed) • Customer signs off digitat)	• Work order marked as complete • Customer receives invoice or feedbadneck • Techniclan logs report. closes ticker	• Customer is offered service plan prenteded wyitaray • Recommendations based on issub history Date tagged for future analysie
Interactions	• Fast creation of work order through automation • Reai-time acknowledigmenti of	• Help me get rhn right technician • Give me a rellable - appointment time	• Help me track progress • Ensure technician has rodis to finish quiskty	• Help me know the job is done property • Instant digital receipt	• Help me avoul future issues • Let-re get better deals for repeat service
Goals & motivattions	• Fast creation of work order through automation • Real-time acknowledgrant of service request	• Inneligent sassignment • reduess technician • trevel time • Trausparent communicati-	• Real-time technician lavatioh iracking • Transparent communicp-dax with the customer	• Easy and quick reedback sudression • Instant digital redeipt	• Personalized product subgestions • Loyerly ofters or imain-tenance rentinders
Posititve moments	Long wall times to reach support Real-Itite attopsdedigement of service request	• Emors in technician matching or jod-clets • App crashies or acks real-time updates	• Delays due to traffic or unavalablity of parts • Poor technician cutomer communication	• Easy and quick feedback submission • Instant digital reselpt	• Unwanted marketing nesisapes • No tokive up or unnresive e issues
Areas of opporfunity	Implove Àir pased chat or voice assstent to handle common issues	• Optimize mobile-app UX for technicians	• Implement prectitiguse sceet, for techhic • Use Alito pre-check availablity and predlcl	• Enable photo-based comeletion proof • Automencally triggorr satisfaction survey	• Integrate productive marttshplics alerts • Otfer subscriptions for priority service