

FIELD SERVICE WORKORDER OPTIMIZATION

Date	20-06-2025
Team ID	LTVIP2025TMID29686
Project Name	Field Service WorkOrder Optimization
Maximum Marks	

CHAPTER -5: PROJECT PLANNING & SCHEDULING

Project Planning & Scheduling for your Field Service Work Order Optimization initiative

5.1 – Project Planning

Project Planning Overview

Project planning defines the roadmap for successful execution. It includes identifying tasks, resources, timelines, dependencies, and milestones to ensure the optimization system is delivered on time and within scope.

Tools for Planning & Scheduling

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- **Project Management Platforms:** Jira, Trello, Microsoft Project
- **Scheduling Optimization Engines:** Salesforce Field Service, Dynamics 365 RSO2
- **Collaboration Tools:** Slack, Microsoft Teams, Confluence

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- **Visualization Tools:** Lucidchart, Miro for workflows and architecture diagrams

Week	Scheduling
1 st Week	Requirement analysis
2 nd Week	Creation of objects and tabs
3 rd Week	Apex Triggers
4 th Week	Reports
5 th Week	Dashboards