



Salesforce Sales Cloud And Salesforce Service Cloud Improve The Uptime Of Healthcare Assets For A Medical Equipment Maintenance Firm

Client Overview

A medical equipment maintenance firm in the US wanted to digitize its manual service processes. The client has designed proven maintenance solutions to help clinical staff spend less time maintaining equipment and more time improving care delivery. We used Sales Cloud and Service Cloud to automate the service modules, including repair call management, field service management, subscription management, and supplier management.

Business Needs

The client's service processes were manual and siloed. All support tickets were created and maintained on spreadsheets. Field service data was scattered across texts, emails, and WhatsApp messages. Plus, a high number of manual touchpoints led to communication gaps between field service engineers and customers. Additionally, to identify projects requiring to be quoted, the client relied on multiple systems including Monday.com, QuickBooks, Google Calendar, and Fix.com. This dependence slowed down every project's time to market and made the customer service processes ineffective. The client wanted to reduce the time taken to identify projects that required quotations. Here are some of the concrete needs that the client was looking to meet through a robust technology solution.



Canceling the reliance on third-party systems to track the projects requiring quotations



Fine-tuning customer service processes so that they improve client engagement



Assigning tasks to field service engineers based on their availability, skills, workload, locations, service type, etc.



Managing the vendor/contractor database more effectively



Building dedicated dashboards showing current month's PM and service projects, the projects that are on horizon, and the sales of previous year's months



Automating communication touchpoints

Strategy & Solution

The client needed a robust system that could cut down its reliance on third-party solutions, which increased the costs and maximized the time for identifying projects requiring quotes. With the deployment of such a system, the client also wanted to accelerate the pace of digital transformation. To help build such a system, the client needed to team up with a technology partner that had years of experience in developing and implementing such enterprise-class systems. The client's search for a trusted digital transformation partner ended with us.

Owing to Cloud Digital's vast experience in helping businesses speed up their digital transformation, the client chose Cloud Digital as its technology partner. On brainstorming with the client's business team, our technology experts figured out that Salesforce could be the platform of choice to build such a robust system. On deeper engagements with the client's business team, it was decided that two Salesforce Clouds - Sales and Service - could form an integral part of the system.



Front-End

To help build an intuitive front-end system, we relied on the Salesforce lightning design system. We designed a system UI that was in sync with the brand guidelines provided by the client. Moreover, we ensured to customize the interface for helping users manage their services and sales processes more effectively. Here are some highlights of the project's

- ✔ Customized sales and service processes so that they get more streamlined
- ✔ Deployed intuitive interfaces for managing field service engineers/services
- ✔ Integrated smooth UX elements to manage work orders, shifts, etc.
- ✔ Designed and deployed easy-to-use, interactive dashboards

Backend

The backend efforts for the project were carried out by our team meticulously. Our backend team and Salesforce engineers worked together to configure Sales and Service Cloud ecosystems for the client. The team also set up profiles, case record types, service console queues, case routing/assignment rules, case escalation processes, and auto-response rules. This way, our team ensured that the client could cut down its reliance on third-party services and keep track of its projects that required quotations. Here are some key points that defined the project's backend.

- ✔ We integrated the enterprise system with Salesforce's Field Service Lightning and QuickBooks components
- ✔ Enabled the system admin to add, delete, and manage multiple user profiles at an incredible scale
- ✔ Implemented different processes to make sure reporting datasets and values could be handled easily
- ✔ Executed processes to manage work orders, resources, appointments, field service inventory, etc.

Development Process

From the onset of the engagement, we worked closely with the client's business and technology teams. We made sure that our efforts helped roll out the Salesforce project deliverables, keeping in mind the predefined milestones. We also embraced agile work methodology, which empowered the development teams to fast-track the delivery cycles. Here are some highlights of the development process.

- ✓ Brainstormed the project requirements alongside the clients
- ✓ Carried out regular sprint meetings to discuss the project's deliverables
- ✓ Ensured that any changes were implemented in short order
- ✓ Delivered post-deployment support and planned extensive KT sessions

Business Outcomes

Once the Salesforce system was up and running, the client experienced a massive efficiency improvement. Upon deploying the system, the client introduced automation into its multiple business processes, including service calls, field service management, and financial management. After the Salesforce-powered system went live, the client's teams got full visibility into service contracts, SLAs, and product inventories. Moreover, support tickets were now automatically generated and converted into work orders on the Service cloud. Here are some key benefits that the client reaped once the project was deployed.



- ✓ Automated the subscription and repair service call management, vendor/supplier management, field service management, and financial management processes
- ✓ Enabled the system to act as a central data repository to carry out highly dynamic reporting
- ✓ Engineered a dashboard with key metrics for making informed strategic decisions
- ✓ Implemented Service Cloud to manage over 500 new orders and inquiry emails daily
- ✓ Streamlined how service teams are assigned cases, which are developed on the basis of the existing product line
- ✓ Integrated the service team's availability data with Sales Cloud for simplifying follow-ups
- ✓ Accelerated the delivery speed of service processes, making them faster and more efficient

Client's Speak



The team was able to give all the deliverables within the defined timeframe. I am very happy with the performance as Cloud Digital is a trusted Salesforce partner. Right from cloud implementations to project management, everything was impeccable.

