

Salesforce Implementation for Siemens

Field Service Lightning (FSL)

FSL is an app package for Salesforce Service Cloud which uses Lightning Experience and a native mobile app available for iOS and Android. It is a comprehensive solution for the support and management of customer service processes in a specific region, planning, installation, maintenance, repairs etc. FSL enables dispatchers to conveniently plan and optimize the use of resources (field service staff) and to facilitate the communication between technicians and dispatchers as well as easy reporting of servicing work directly from the customer's site.

Results

The productivity of a customer service department may be expressed as a summary of all the interactions between operators and customers. Each customer expects to be treated on an individual basis and the only way to achieve this is to keep detailed records of each interaction in a single central point. And that is exactly what the new customer service platform provided for the Customer Services division of the Siemens' Digital Industries. Now the underlying data-driven metrics makes it easy to quickly get answers to questions regarding the average response time, customer satisfaction levels, and much more. The new reports provide clear guidance as well as quantified input data for further customer service improvements.

From the point of view of the customer support operators, the most significant benefits include particularly the possibility to work in a single system. Information is not scattered across various systems anymore – instead it is very clearly and conveniently presented in one single location and, most importantly, it is available online. This means that at any point in time there is an up-to-date overview of the services being provided. The managers in charge may thus easily assess the quality of services delivered to customers, which used to be a very complicated process.

Background

The Customer Services team at the Siemens' Digital Industries needed to improve customer care at two basic levels – direct communication with customers and efficient internal communication. Among other requirements they wanted to get rid of the necessity to record data in the form of files saved on a shared server, combined with an e-mail client.

The Sprinx Consulting experts trained the Customer Services team with the Salesforce platform, specifically the Service Cloud, explained all the features and helped to set up internal processes.

Requirements

The main requirement of the client was to keep all the information at a single location, to establish the right links within the individual pieces of information (who, when, with whom, and what was communicated), and thus to enable the customer service staff to work in only one system.

Another important requirement was to obtain an overview of the customers and the related activities, with the possibility to prioritise the individual activities based on the type of the customer or their contract and the SLA (Service Level Agreement) mode. The SLA requirements, i.e. those which must be handled within a specified time period, are automatically moved to the top of the queue.

Solution

First of all, Sprinx Consulting analyzed in detail the style of work within the customer service department. Then it was necessary to consolidate the data – this is the first and most important step towards an efficiently working new solution. The existing data were used to populate the customer information base. These data, which are needed for further work with the customers, have been linked with a communication channel which in this case is email.

Customers' requirements are sent to a specified e-mail where the message is automatically placed in a Salesforce queue. Subsequently, the requirement is prioritized according to a defined set of criteria.

Salesforce provides a place for communication between an operator and a customer, and also internally between an operator and servicing technicians. Communication with the servicing technicians works on two levels – providing support to the operator who addresses the customer's requirements, and also directly during the servicing work at the customer's site via the Field Service Lightning app.

Challenge

In line with our usual approach to projects, when working for Siemens we first needed to get to understand the client's system of work and then to design a solution which meets the client's requirements to the maximum extent and which is aligned to the features offered by the Salesforce system. Essential requirements specified by the client:

- The ability to handle a customer's requirement as quickly as possible, with the support of all the information and data needed by the customer service at the given time.
- The ability to cooperate with external systems, as some of the servicing requirements must be addressed in cooperation with other Siemens divisions that use their own servicing portals.

Within Salesforce is also possible to plan and monitor the work carried out by technicians. The operator assigns the service appointment to the technician also with specific spare parts that are needed. The technician then carries out the repairs on-site and records all used, unused and taken spare parts. After the repair work is completed, the technician asks the customer to sign the service report, thus confirming the takeover of the repaired and tested equipment. All communication between operator and technician goes through the mobile app and is reported online. Therefore, the operator can see all updates in real-time.

A set of reports has been created for the Customer Services team manager at Digital Industries, allowing the manager to quickly find out the number of received requirements, the speed of their completion, how long it took from receiving the requirement to sending the offer for service, and also how long it took the customer to reply. Furthermore, the reports show the duration of the communication between the operator and the technician and the service work as well. A full overview about the service process is available in the customer's case.



Possibilities to further expand FSLS

The Salesforce-based solution delivered by Sprinx Consulting to our important client has been designed so as to allow further expansion with new modules and features. For Siemens, the most relevant areas include the customer portal and sales support.

Examples of sales support features:

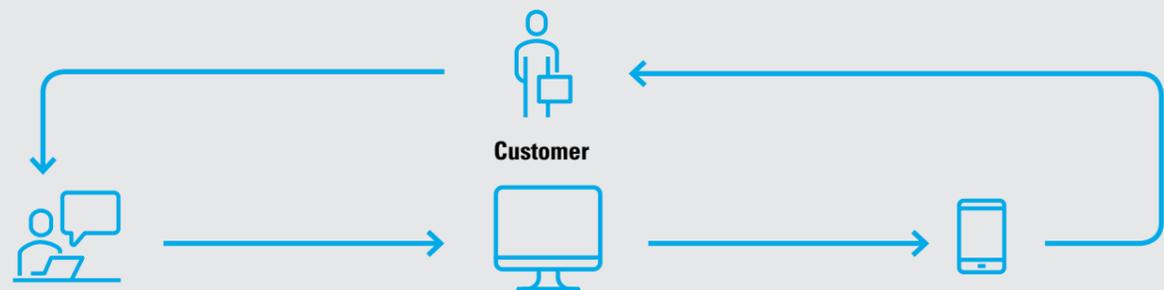
- Connecting sales representatives with a customer database managed within Salesforce
- Keeping records of business activities with customers
- The possibility to file contract records and to monitor them

In case of adding a customer portal, it would be possible for example to:

- Enter requirements for spare parts or service via a web portal
- Approve servicing offers
- Monitor the status of servicing work online
- Display an overview of servicing contracts for a given customer
- Monitor the servicing hours worked

SIEMENS

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- Operator
- Addressing the received requirements
- Administering the individual cases
- Creating work orders and servicing meetings

Dispatcher

- Dispatching staff
- Assigning a servicing meeting to technicians
- Optimizing and planning the available resources

Technician

- Field Service Mobile user
- Receiving and handling customer's requirements

Benefits for Siemens

Easy administration of planning and coordination thanks to the comprehensive user interface.



The possibility to display information on maps and to monitor the service orders and field service staff in real time



The high degree of optimization thanks to the advanced planning algorithm



The possibility to take into consideration the KPIs of individual customers, through simple settings



The mobile app enables the field service staff to swiftly communicate with the dispatchers, to find their way to the customer's site, to send messages, and to submit servicing reports directly from the customer's site

We were considering various systems that would improve our work and make us more efficient in delivering services to customers. In the end, we chose Salesforce as the ideal platform which allows gradual expansion by means of integrating additional modules. For the implementation itself, we chose Sprinx Consulting because they had already completed a number of interesting implementation projects.

The beginnings were rather difficult for us – the new system required a different way of working and it also significantly changed the internal processes. However, in a very short time we could see the results, including the unified processing of all the customers' requirements, internal communication, and a comprehensive assessment of our efficiency.

We have been using Salesforce for two years now and we still continue with the development. It is a truly broad platform that we plan to further expand and thus to improve and simplify the approach to our customers.

David Čežík
head of Customer
Services Motion Control
and Factory Automation
Digital Industries



Sprinx Consulting delivers Salesforce, including the related and additional Service Intelligence services, to the Customer Services department of Siemens Digital Industries. Siemens Digital Industries sets trends as well as the direction of new developments in automation and digitalization of industrial production, supporting customers from the processing and manufacturing industries in their digital transformation. They are continuously innovating and extending their unique digital business solutions through which they help companies of all sizes and industries to manufacture in a faster, more flexible, superior and safer way.

Sprinx Consulting

Sprinx Consulting s.r.o. is a subsidiary of Sprinx Systems, a.s., a Czech technology company. We specialize in consulting services regarding the Salesforce and Veeva platforms, including their implementation. Other areas of expertise include "front-end" systems or, in other words, web-based solutions that are used directly by the common user. They may take the form of websites, portals, webshops, integrated reporting and managerial interfaces (MIS), application hosting or economic system hosting – whatever you need, we are here to advise you and take care of the entire implementation of the selected solution. Last but not least, we offer services associated with "Big data" as well as customized software development.