

System Consolidation



The Challenge

This large manufacturer and business services provider was struggling to manage the inbound reports being submitted by their various field service units. Each different business unit was utilizing their own unique third-party technology solution for reporting, even though their needs and requirements were remarkably similar. The organization had already built and implemented a proprietary system for managing service data, however it lacked an integration with their Salesforce system. Their goal was to, 1) move away from third-party solutions to avoid user-based subscription fees, 2) utilize the same technology solution across all their field service units, and 3) to have all their data stored in a centralized location for easier management and visualization.

The Solution

For us to deliver the most valuable solution, we first needed to gain a deeper understanding of the differing business units, their alignments, and gaps. Once we had identified the differences and similarities in requirements, we began development. We first created an integration between Salesforce and their proprietary solution - allowing them to begin hosting current activities in their system rather than relying on third-party tools. We then developed additional features, in priority order, as an extension of the existing functionality. These features allowed them to adapt the system to the specific needs of each business unit - managing requirements from across the organization. To prove the validity of these deployments, we delivered MVPs (minimal viable products) that could be deployed to a specific set of users for testing before rolling them out to the rest of the organization/business unit(s).

The Results

Following the completion of our initial engagement, our client was able to begin migrating field service units and customers from the old third-party tools into the new system. Maintenance costs significantly decreased as they were only maintaining the single system, and they experienced a substantial boost in operational efficiency and customer satisfaction - through process consolidation and simplified onboarding. Training also became much more straightforward as all business units were utilizing the same technology, making the movement of technicians from one business unit to another much less intensive. Our team continues to provide on-going support and feature enhancements for this system.