

Brillio's Salesforce Field Service Lightning

Delivering a Unified and Consistent
Experience Across the Customer Journey



The Need for Field Service Lightning

Businesses today face significant challenges in delivering seamless field service operations. Inefficient scheduling and dispatching often result in service delays, while disconnected systems and fragmented data hinder informed decision-making. Field teams frequently lack the tools and insights needed to provide exceptional service, leading to declines in customer satisfaction and loyalty.

Field Service Lightning – FSL – effectively addresses these challenges by offering a comprehensive solution that stands out from traditional tools. Operating seamlessly on the same platform as **Salesforce Service Cloud**, FSL ensures a unified and consistent experience across the customer journey.

The platform's flexibility allows businesses to configure and customize it to meet their unique needs. With industry-leading **scheduling and optimization capabilities**, FSL ensures efficient resource allocation for both simple and complex scenarios. Its **native, offline-first** mobile experience equips field workers with intuitive tools and embedded guidance, enabling reliable performance even in areas with limited connectivity.

Key Benefits of Field Service Lightning

Enhanced Self-Service with Automation:

Automates customer service processes to reduce manual tasks and errors, enabling faster issue resolution and empowering customers with convenient self-service options.

Unified Agent Console: Consolidates customer interactions into a single interface, improving productivity and ensuring seamless, personalized service.

Knowledge Management: Provides a centralized knowledge base, allowing agents and technicians to quickly access essential information and resolve issues efficiently.

Customer Self-Service Communities:

Empowers customers with user-friendly portals to solve issues independently, reducing reliance on support teams and speeding up resolutions.

Customer Data Unification: Centralizes fragmented data to deliver actionable insights, personalized services, and informed decision-making.

Field Service Technician Management:

Optimizes technician schedules, delivers real-time updates, and equips technicians with the tools needed to improve productivity and service quality.

Brillio's Salesforce Field Service Lightning Solutions

Brillio's Field Service Lightning solutions encompass a wide range of capabilities tailored to meet the complex needs of modern field service operations, designed to streamline processes, improve efficiency, and deliver exceptional service quality. Below are the key categories and their highlights:

- **Order Management:** Streamlining the creation, processing, and management of service orders with real-time updates and adjustments to ensure accuracy and efficiency.
- **Inventory Management:** Enabling real-time tracking, streamlined requests, and seamless inventory transfers to maintain optimal resource availability across locations.

- **Scheduling & Dispatching:** Optimizing task assignments and routes through user-friendly scheduling interfaces, skill-based dispatching, and geo-location tools.
- **Mobile Accessibility:** Equipping field agents with real-time updates, offline capabilities, and automated workflows to ensure uninterrupted service delivery.
- **Integration with Other Systems:** Ensuring seamless communication and data consistency by integrating CRM tools and maintaining synchronized order and inventory updates.
- **AI-Based Reports & Dashboards:** Providing actionable insights through mobile apps, real-time reporting, and offline access to improve decision-making and operational efficiency.
- **User Training and Support:** Delivering comprehensive training, ongoing support, and a centralized knowledge base to empower field teams and ensure smooth operations.
- **Customization and Configuration:** Tailoring solutions with custom fields, process automation, and personalized interfaces to meet unique business needs.
- **Security and Compliance:** Guaranteeing data security and regulatory compliance with role-based access controls and robust security measures.
- **AI and Chatbots:** Leveraging AI-powered chatbots, predictive services, and automated responses to enhance customer interactions and preempt issues.
- **Service Collaboration:** Facilitating real-time communication and document sharing between field and office teams to improve collaboration and service delivery.

- **Customer 360 View:** Providing a unified, comprehensive view of customer profiles, service history, and preferences to deliver personalized and efficient support.

Brillio's Approach for FSL Implementation on Salesforce

Brillio's methodology for implementing Field Service Lightning revolves around a structured yet flexible, human-centric approach. This five-phased process ensures all aspects of the implementation are aligned with business goals while maintaining a seamless transition for teams and stakeholders.

Discover & Define: Establishes a strong foundation by identifying requirements through stakeholder interviews, user personas, and customer journey mapping, coupled with governance and cadence planning.

Design: Converts insights into actionable plans with defined user stories, wireframes, technical architecture, and DevOps mechanisms to ensure seamless progress.

Iterative Build in Sprints: Develops and tests the platform in iterative sprints, focusing on integrations, customizations, and data migration readiness.

Deploy: Ensures a smooth rollout with team training, defect resolution, user acceptance testing, and comprehensive documentation to transition into live operations.

Evolve: Focuses on sustaining value with warranty support, defect resolution, and a seamless handover to the support team, ensuring operational excellence post-implementation.

Why Brillio? What Sets Us Apart

With a history of delivering outstanding results, Brillio has earned the trust of organizations aiming to optimize field service operations and drive transformative business success. Here's what makes Brillio the partner of choice:

- **Deep Knowledge of Consumer Industry:** Brillio enables end-to-end optimization of field service journeys by leveraging extensive expertise in field service operations and customer relationships. Utilizing data-driven insights and advanced analytics, Brillio transforms operations through cutting-edge technology and AI-driven solutions.
- **Unified Business & Technology Excellence:** We enhance customer journeys and deliver measurable outcomes by seamlessly integrating technology with customer-centric business processes. By employing proprietary accelerators and AI-enabled automation, Brillio maximizes marketing ROI while aligning with organizational OKRs and KPIs.
- **Agility to Drive Transformation:** Brillio ensures focused leadership and governance cadence by structuring dedicated independent business units. By balancing scale with flexibility, Brillio drives transformation through the execution of complex projects while tailoring solutions to specific business needs.
- **Innovative Commercial Flexibility:** We foster continuous innovation by structuring our approach around variable fees tied to business outcomes through Business Level Agreements. By allocating upfront investments as part of the Total Contract Value, Brillio drives measurable value and impact.

- **Best-in-Class Talent and Operating Model:** Brillio ensures operational stability and workforce continuity by implementing a robust talent management strategy. Through client-specific academies, a buffer capacity of less than 10% attrition, and an 18-month non-release policy for rebadged resources, Brillio enhances service excellence.
- **Execution:** Brillio drives high-impact Field Service Lightning implementations by scaling large teams and integrating solutions beyond Salesforce. By leveraging a cost-effective mix of onsite and offshore teams, Brillio enhances platform functionality and service delivery with precision and efficiency.

Real-World Examples of Field Service Lightning Impact

30% Productivity Boost for a Leading Home Improvement Brand

Brillio partnered with a leading home improvement solutions provider to implement Salesforce Field Service Lightning, streamlining operations across 1,500+ users in North America. The solution integrated real-time scheduling, inventory management, and mobile tools, enabling seamless coordination between dispatchers, technicians, and managers. This transformation led to a 31% increase in first-time fix rates, a 30% boost in mobile worker productivity, and 100% accuracy in scheduling.

Impact Delivered Across Industries

- Achieved a **70-80%** first-call resolution rate by reducing average handling time for a leading digital remittance service provider.
- Improved cross-sell opportunities by **20%** through unified customer data for a renewable energy solutions provider.
- Increased site traffic by **750%** through self-service community implementation for a global ticketing and event platform.
- Reduced resolution time by an expected **25%** for a professional networking platform.
- Achieved a **92%** first-call resolution rate for a multinational biotechnology company.



ABOUT BRILLIO

Brillio is one of the fastest growing digital technology service providers and the partner of choice for many Fortune 1000 companies seeking to turn disruptions into competitive advantages through innovative digital adoption. We help clients harness the transformative potential of the four superpowers of technology: cloud computing, Internet of Things (IoT), artificial intelligence (AI) and mobility. Born digital in 2014, we apply our expertise in customer experience solutions, data analytics and AI, digital infrastructure and security, and platform and product engineering to help clients quickly innovate for growth, create digital products, build service platforms, and drive smarter, data-driven performance. With 14 locations across the US, the UK, Romania, Canada, Mexico, and India, our growing global workforce of 6,000 Brillians blends the latest technology and design thinking with digital fluency to solve complex business problems and drive competitive differentiation for our clients. Brillio was certified by Great Place to Work® in 2021, 2022, 2023, and 2024.



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