

Improving Large-Scale Mobile Operations with Salesforce Field Service

Client Profile

With 80,000+ employees in 100 countries, the S&P 500 client is a US based, multi-national biopharmaceutical contract research organization.

The client provides a complete set of outsourcing, consulting, laboratory, and development services for Phase I-IV biopharmaceutical clinical trials.

Business Challenge

The client was using time-consuming manual processes and spreadsheets to schedule field service visits. There was no easy method to identify field service worker availability, match their skill sets to the services needed, optimize travel routes, and monitor overall operational efficiency.

As a result, scheduling onsite visits were becoming increasingly time consuming and problematic. In addition, the organization lacked visibility into service operations and field staff productivity. Account executives wanted to be able to improve field service efficiency by better tracking operational metrics and identifying process bottlenecks.

Business Solution

RadixBay analysts held a series of system design meetings to evaluate the client's current needs, pain points, and future goals. The analysts created detailed specification documents to record the client's requirements. RadixBay's team of Salesforce certified specialists used the information to configure Field Service Lightning to meet the client's needs.

RadixBay worked with the client to develop a user training curriculum, execute user acceptance testing (UAT), and perform the production implementation.

Operational Metrics:

- **3,000 Field Service Workers**
- **69,000 Field Households**
- **300,00 Field Participants**

Ongoing Support

After the production turnover, RadixBay continues to provide value to the client by performing system upgrades, administering users and managing all aspects of the new system including service resource shifts, service territories, field service dispatch settings, creating and monitoring optimization jobs and supporting mobile functionalities.

Benefits Delivered

- The client is able to quickly and easily schedule onsite visits, assign technicians with the skills needed to perform the services, and optimize their travel routes
- Real time visibility into operations and historical reporting capabilities enable the client to easily evaluate efficiency and identify areas for improvement
- Better communications and onsite visit efficiency has led to an improved field participant experience and an increase in satisfaction
- Reduced mileage, fuel costs, and vehicle maintenance

About RadixBay

From installation, configuration and integration with other systems to optimization and ongoing support, RadixBay provides a complete set of Salesforce services.