CASE STUDY

FIELD SERVICE LIGHTNING

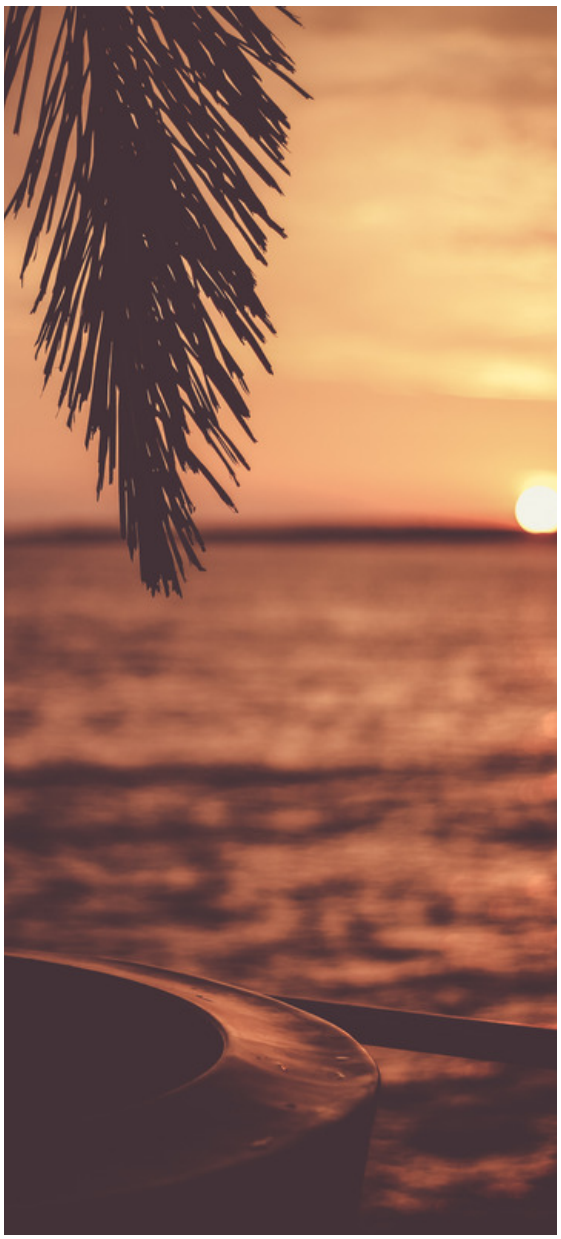
HAWAIIAN COOL WATER

AppSolve

FIELD SERVICE

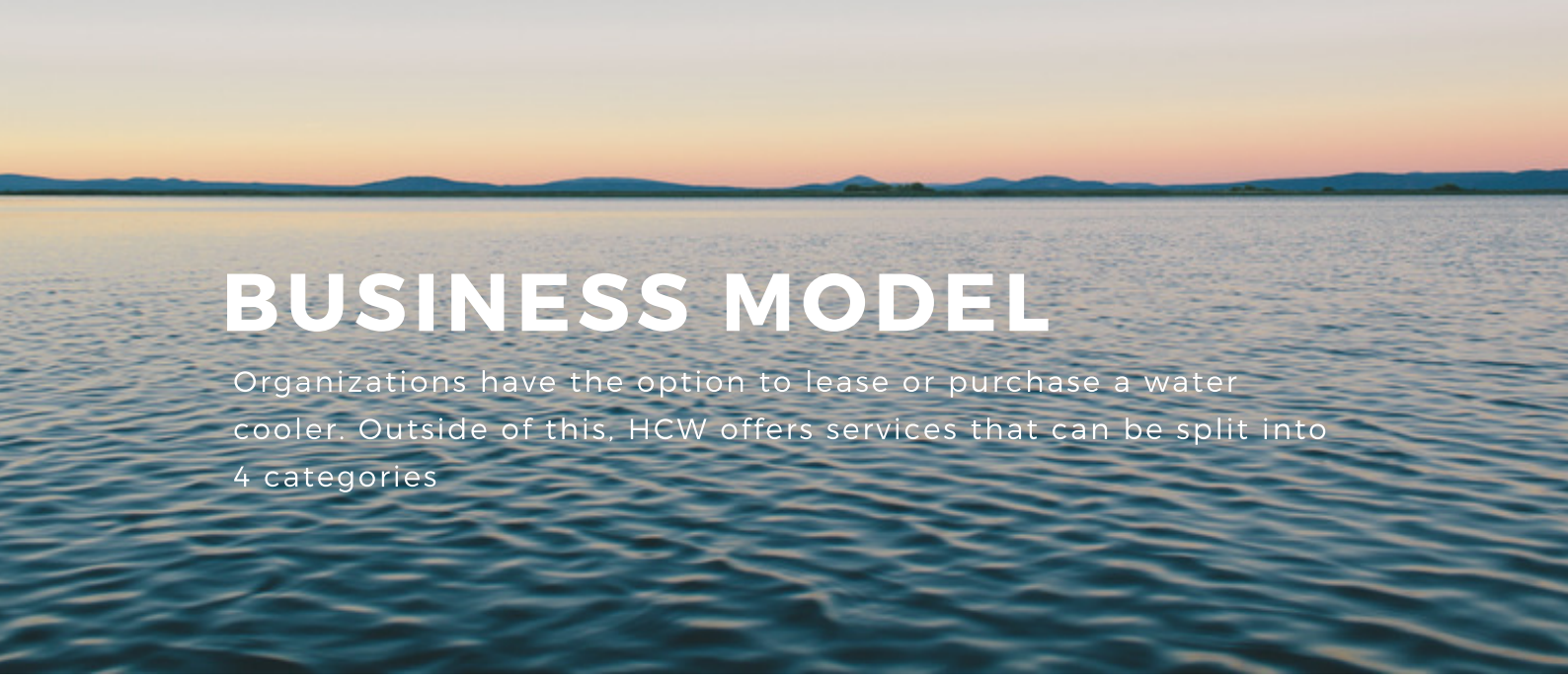
COMPANY PROFILE

A LOOK AT HAWAIIAN COOL WATER



Hawaiian Cool Water (HCW) operates on the belief that **“The water we drink should not only be clean, but its production and delivery should be non-damaging to our environment.”**

HCW achieves an environmentally conscience water product through purification of water right before it is dispensed, which eliminates the need for plastic waste from bottles and water jugs.



BUSINESS MODEL

Organizations have the option to lease or purchase a water cooler. Outside of this, HCW offers services that can be split into 4 categories

Installation

For example, a client purchases a new water cooler, piping to the water source needs to be set up in order to operate the water coolers

Removals, Upgrades & Cooler Swaps

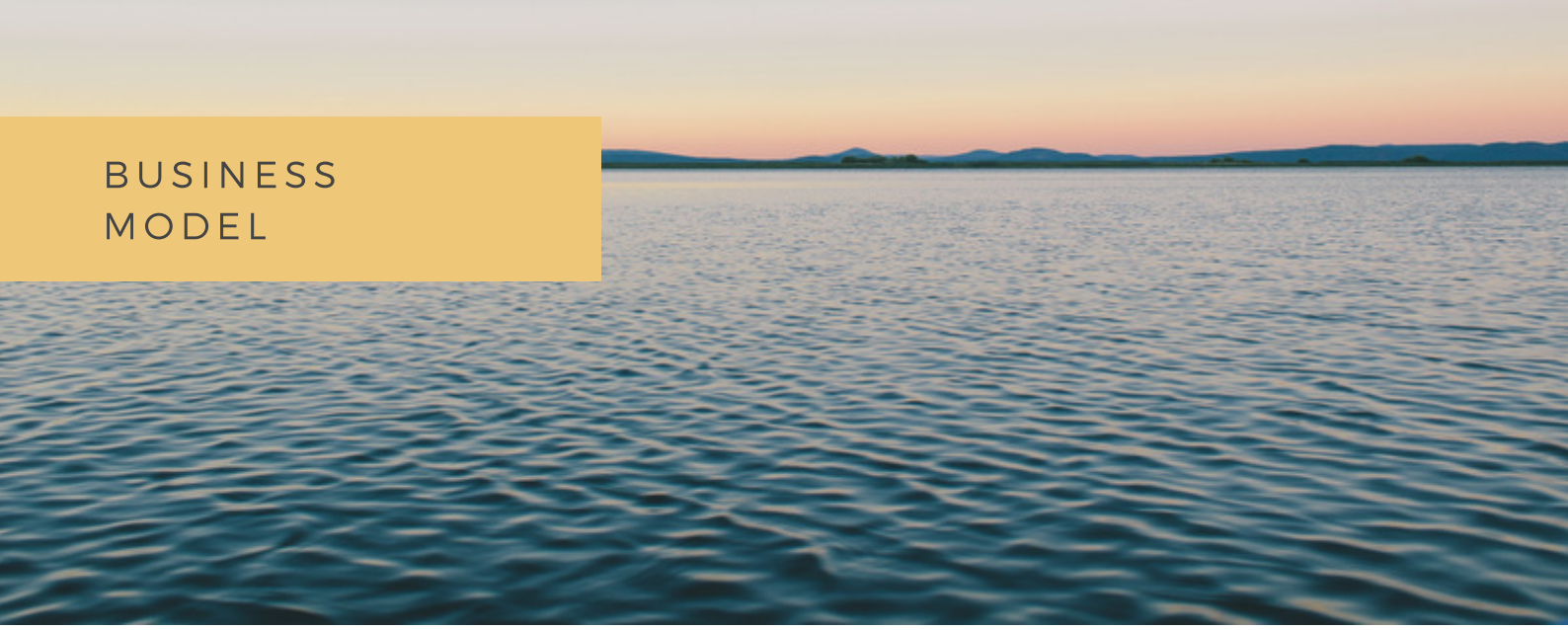
An example would be that a client is conducting renovations in the area where the water cooler is located and would like to move it to a different location. Another example is that a client wants a hot water tap and a cold water tap- this would entail an upgrade.

On-Going Maintenance

An example would be that a client is conducting renovations in the area where the water cooler is located and would like to move it to a different location. Another example is that a client wants a hot water tap and a cold water tap- this would entail an upgrade.

Service Calls

Anytime you have an issue, you can call HCW and a technician will come onsite to fix it.



BUSINESS MODEL

The process by which HCW generally follows when one of the above services is required:

01 Create a Work Order for the asset that requires work

02 Dispatch the job to a technician

03 Technician comes to fix it

HCW has a unique structure for managing their contracts. One **account** can have **multiple sites**, where each of those individual sites may have more than one asset (where an **asset** is the water cooler) **[Figure 1]**. There are two possible contracts that can exist:

- All the water coolers on that one site can be serviced under one contract
- Water coolers can be serviced as a conglomerate of sites under one account

The typical service contract follows this process:
You lease a water cooler, you're billed monthly, and the monthly rate is based off the product you've purchased. The lease term will run 3 years, and will automatically renew unless you opt out.

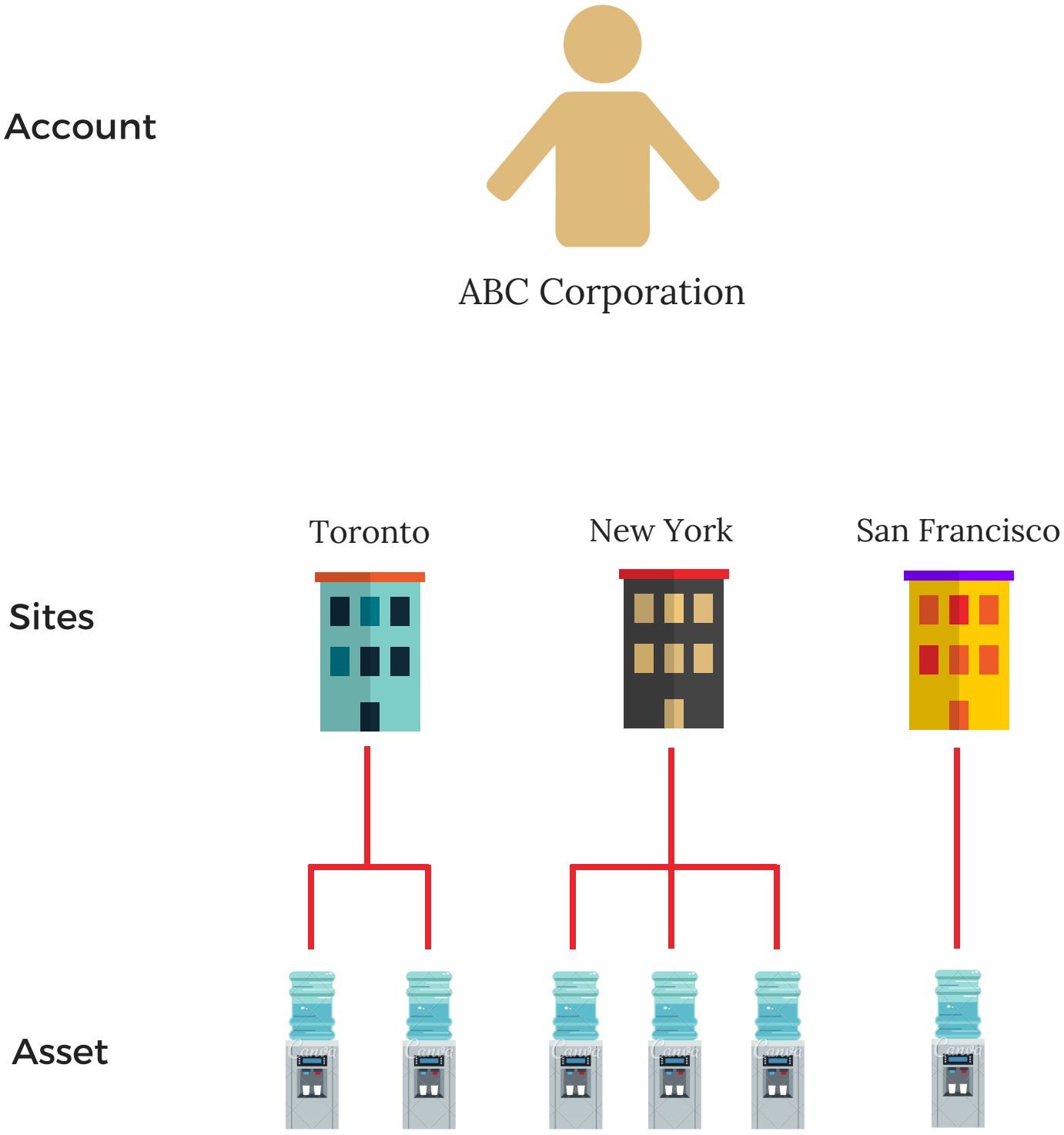


Figure 1.
How Accounts and Sites are structured

THE CHALLENGE

THE ISSUES OF HCW'S FIELD SERVICE LIGHTNING IMPLEMENTATION

At the time HCW already had Sales Cloud, and looked to FSL to improve their dispatch experience.

To improve their experience, HCW looked to implementing FSL and sought out another partner to help them do so. However, the partner was not able to get FSL up and running for HCW and they were faced with a myriad of challenges.

CHALLENGES

ASSET INSIGHTS

- They wanted the ability to see the work order history. If a cooler has proven faulty multiple times, they should be able to see that and deal with the cooler accordingly.

AUTOMATIONS

- Their contract management automations weren't working properly at the time and they had to manually update all of the dates found in the contracts.
- Each time new data was input, they would receive error messages. They weren't able to add new records as a result, which acted as an inhibitor in terms of scalability for HCW

PAPER BASED SERVICE REPORTS

- They didn't gain any insight into the service done on assets- often the papers would be in office and the technician would be onsite

CHALLENGES

USER EXPERIENCE

- The team was not using FSL correctly. Their process was not intuitive and they ended up creating tasks whenever they had service appointments.
- If a site had 5 coolers, they should all be on one work order, not separate work orders. A technician can go on site with 5 coolers to change one filter, but will learn later that the other assets would need filter changes shortly. They could've tackled the filter changes in one site visit if they had the ability to see all assets on one work order.

THE SOLUTION

HOW APP SOLVE ADDRESSED HCW'S ISSUES

Due to the complexity and number of issues present in their FSL implementation, a re-implementation was necessary. HCW entered a Salesforce accelerator on their part to learn how FSL works. On our end, our approach was to take a step back and evaluate their business processes starting with the entry of leads into Sales Cloud.

SOLUTION

AUTOMATION

- **Site Record:** Once a lead is converted, information pulled from the lead record is typically separated into 3 objects: account, contact and opportunity. For HCW's use case, we wanted to create a “Site” record as well. This is because HCW services sites- not “accounts.” As mentioned in the introduction, an account can have multiple sites, where on each site there can be multiple assets. These site records would be tied to an account record. The address of the installation site captured on the lead record would transfer over to the site record when it is converted. This saves time and improves the accuracy of data.

SOLUTION

AUTOMATION

- **Account Object Clean-Up:** There were visual workflows present that acted as a barrier to creating new records and resulted in a buggy error message ridden experience. The original purpose of the workflow in place was to loop through multiple site records and calculate numbers like sum, min and max. However, when adding new records, the automation would break. To address this barrier, we created an APEX based roll-up which freed-up the bugs created from the visual workflows.

SOLUTION

AUTOMATION

- **Won Opportunities:** We created a process for installation, work orders for maintenance service, break/fix work orders and renewal Service Contracts. We adjusted Assets under the Account and Service Contract, ensuring the Service Contract dates and Service Line item dates are the same.
- **Contract Management:** We evaluated the Service Contracts objects and other related objects, updating views and related objects. We updated the work order views and ability to view Service Contracts, ensuring that the work orders were tied back to their respective assets and that they also updated the asset's data upon job completion.

SOLUTION

ASSET VISIBILITY

- We provided insight in the Work Order history by tying assets to their related work orders

USER EXPERIENCE

- **Mobile Application:** Implemented to improve the technician's day to day experience on the job. Technicians are able to press buttons on their mobile app and data would be pre-populated into Salesforce automatically.
- **Dispatcher Console:** Ability to view and schedule work orders. The optimizer allows the dispatcher to auto-schedule based on skills, availability and location of technician. They're able to reschedule jobs or schedule overtime if Work Orders aren't completed for the day as well.

FIELD SERVICE LIGHTNING

AppSolve

Get a free Field Service Management Consultation

INTERESTED IN FIELD SERVICE TECHNOLOGY? NOT SURE IF YOUR BUSINESS IS A FIT FOR FSM? CLICK TO BOOK YOUR CONSULTATION.