



# FSL Breakout session

Implementation best practices for Field  
Service Lightning

11/20/2019 8:30:00

Service Cloud Lodge at the Marriott Marquis



# Session Abstract



Learn best practices for implementing and rollout of field service lightning globally from manufacturing industry service provider (Leadec Beteiligungen GmbH) and implementation partner (PwC Germany).

Learn how they have streamlined their field service operations, empower technicians to improve first-time fix rates, and increase customer satisfaction.

The session will provide you insights into how to set up your organization structure from right governance perspective, focus on defining and aligning global processes, establishing change management network and technology considerations for big transformation projects.





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# DREAMFORCE



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# Showflow



Digital transformation journey at Leadec

Michael Schenk (Leadec Group)

Best practice from trusted implementation and rollout advisor

Mudit Jain (PwC, Germany)

Best practices from field service implementation point of view

Vivek Menon (PwC, Germany)

Q&A







## **Dr. Michael Schenk**

Salesforce Program Manager

[michael.schenk@leadec-services.com](mailto:michael.schenk@leadec-services.com)



# Who is Leadec?



Industrial Service Provider for the factory of today and tomorrow



Sales  
**€900 million**



More than **20,000**  
employees

Americas

Europe

Asia

Install

Electrical Installation

Automation

Dis- and Reassembly

In **14** countries

In more than  
**250** sites

Engineer

Consulting

Engineering

Maintain

Production Equipment  
Maintenance

Technical Cleaning

Support

Technical  
Facility Management

Infrastructural  
Facility Management

Internal Logistics

More than **50 years**  
Industry experience





## Our Vision

We are the leading industrial service provider for the factory of today and tomorrow



# Leadec's Current Mode of Operation

How the business was successfully run in the past



## Status

- Local entrepreneurs manage customer satisfaction and profitability
- Low degree of standardization and harmonization, processes strongly customized to local needs on each site
- Many paper based administrative workflows,
- No common IT system for order management and workforce management

## Consequences

- Lack of transparency of order fulfilment, work task back log and prioritization of work tasks
- No structured skill management
- Low tech / manual dispatching
- Volatile workload planning
- Unclear productivity (planned vs. actual time)
- Manual entries into different systems and double data handling
- Several systems for the same purpose
- Lack of transparency of invoiced orders
- No comparability amongst sites

## Need for action

- Harmonization of global processes => common operating model
- Integrated end-to-end definition of sales, service and workforce management processes => from lead to invoice
- Introduction of an integrative, digital solution to seamlessly implement all customer centric processes and connect to adjacent systems, e.g. BI, ERP and HR systems => single source of truth

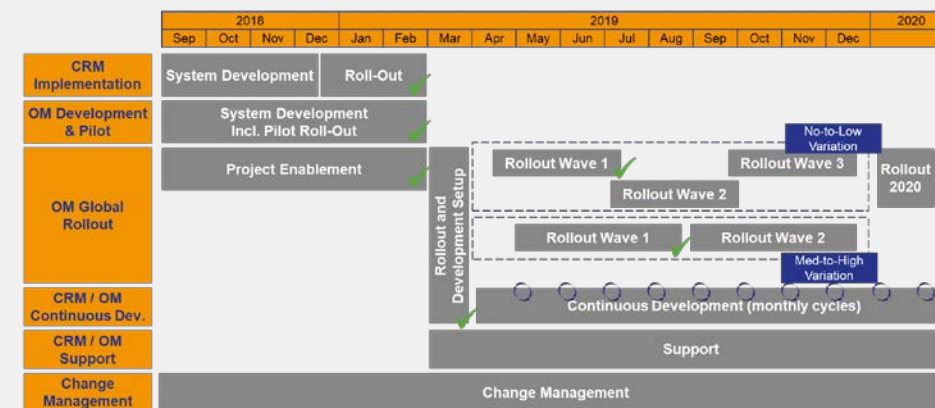
# Digitalization of Leadec's Sales and Service Processes



Core activities of Leadec's main digitalization project



First rough timeline



# Mudit Jain

Salesforce Senior Program Manager

[mudit.j@pwc.com](mailto:mudit.j@pwc.com)

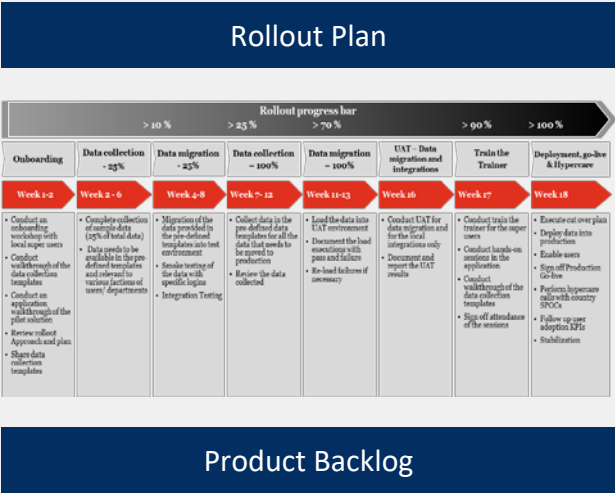
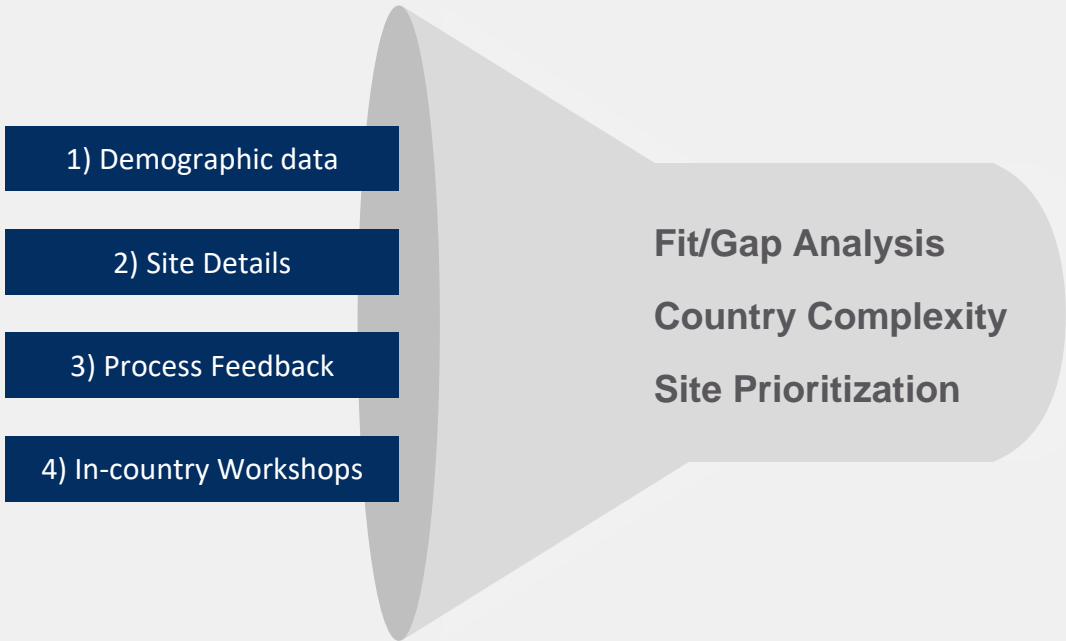




# Best practices – Enablement phase for rollouts

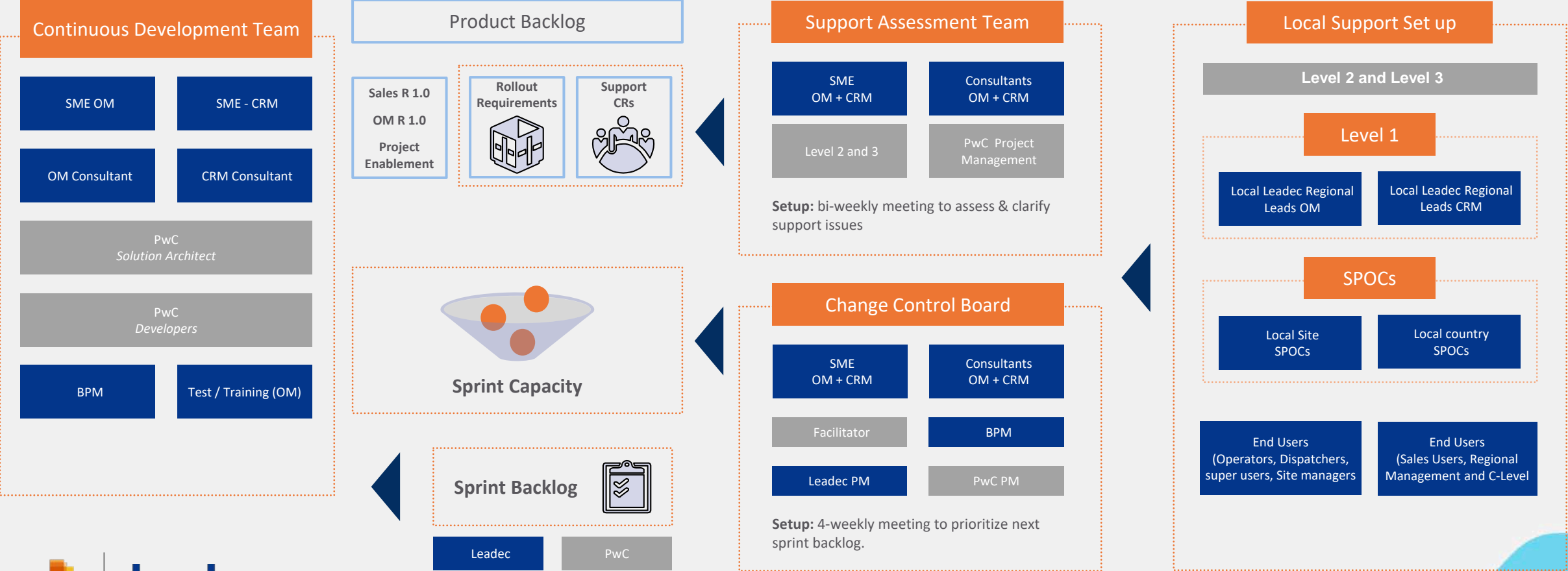
What challenges are faced in Field Service Lightning rollout?

To be conducted in parallel to the implementation of the core field service template to prepare for industrialized Rollouts



# Best practices – Project organization model

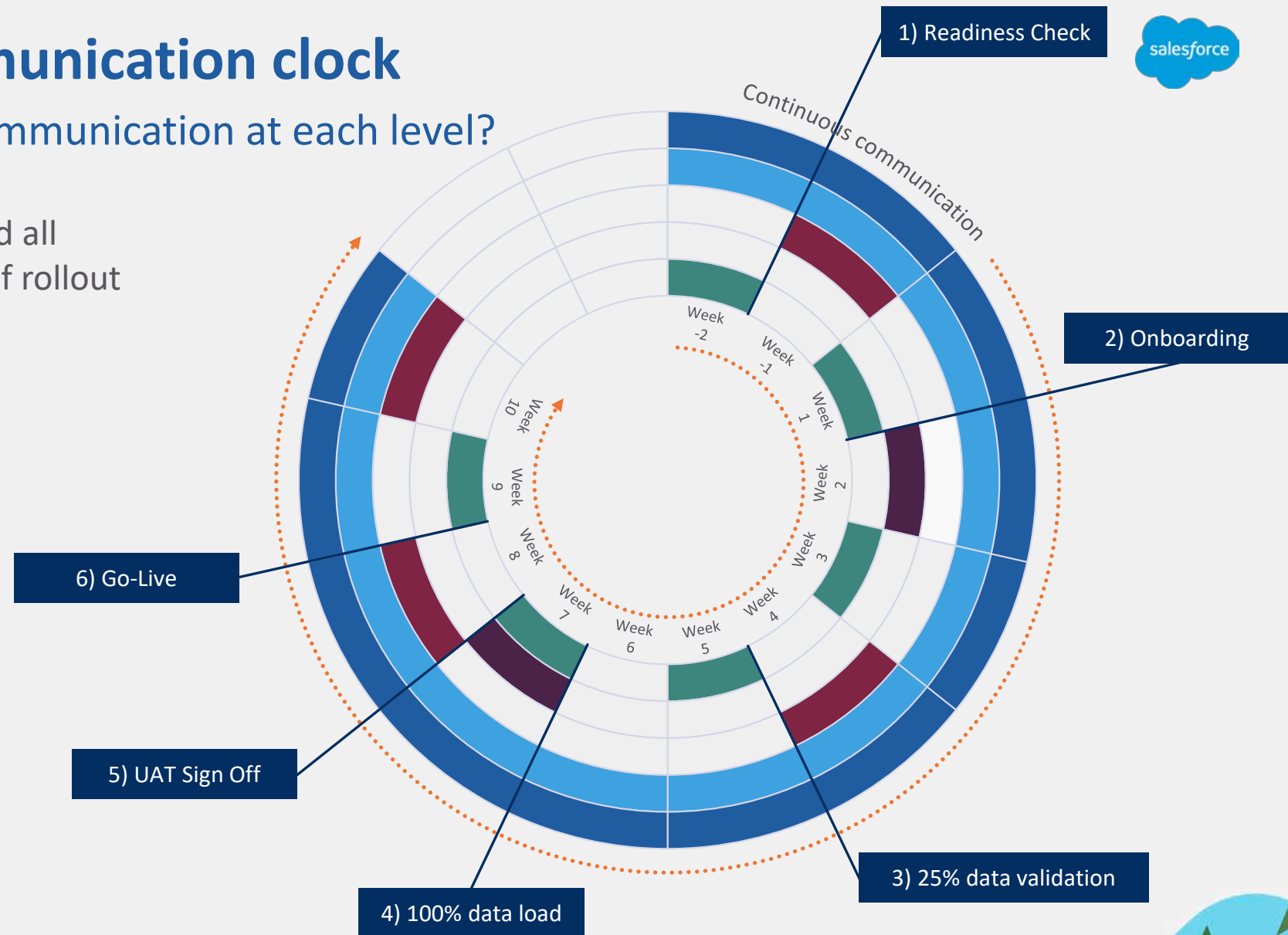
How to establish local governance to align with global goals?



# Best practices – Communication clock

Why it is important to have communication at each level?

A communication clock is built around all stakeholders involved at every level of rollout





# Vivek Menon

Manager, Technology Consulting –  
Salesforce

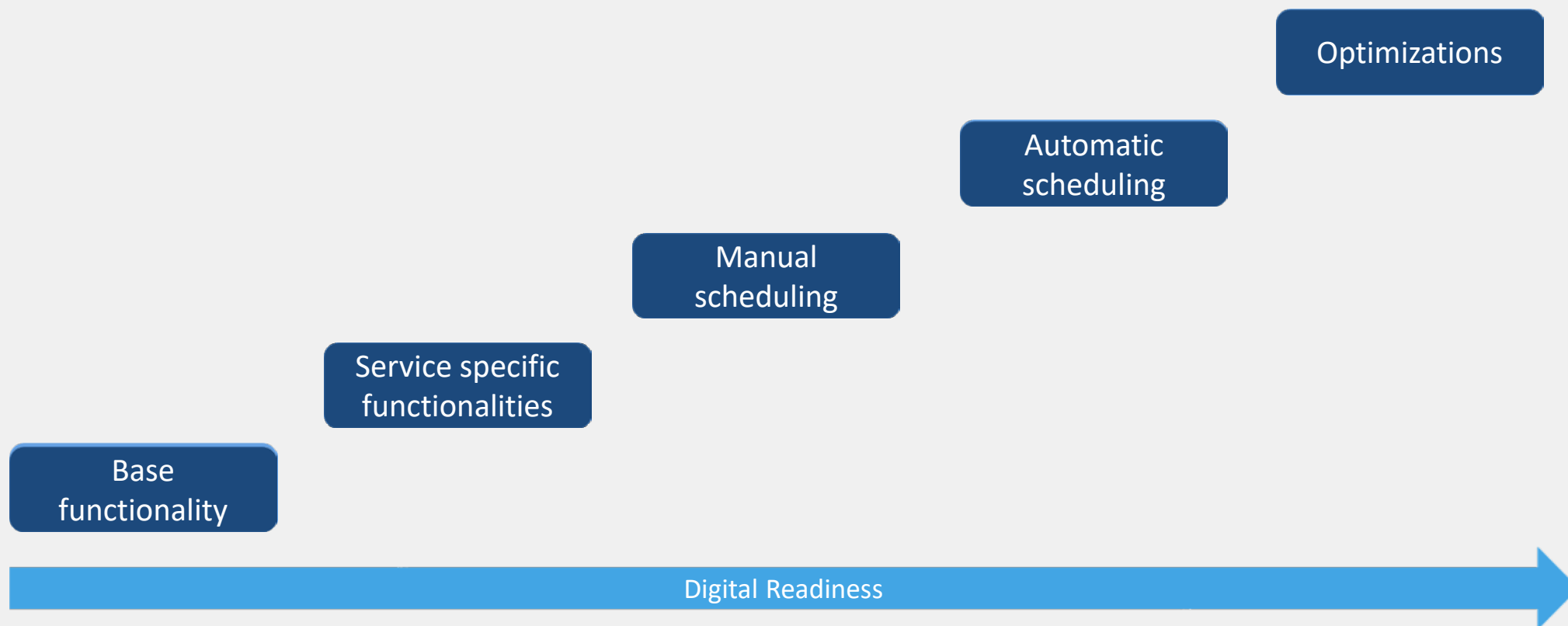
[menon.vivek@pwc.com](mailto:menon.vivek@pwc.com)



# Best practices – Step by Step induction into Field Service



How to decide which functionalities of Field Service Lightning to be enabled first?



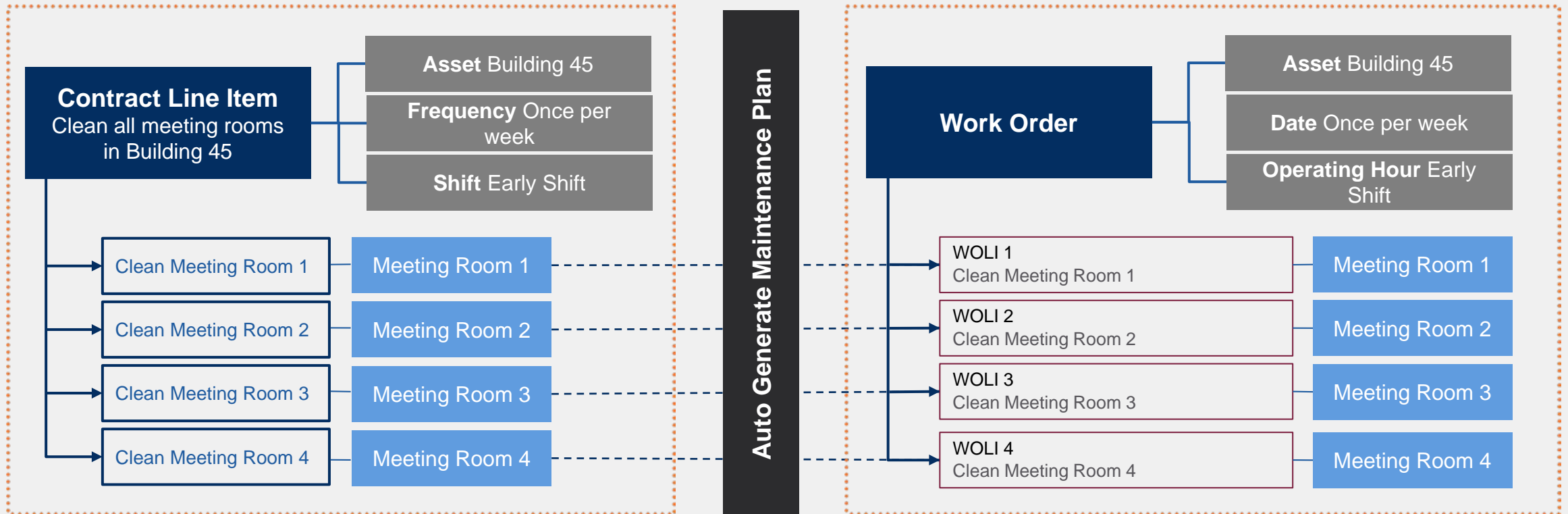
# Best practices – Handling the scale of Infrastructural FM\*



5000 Contract Lines

200 Work orders / day

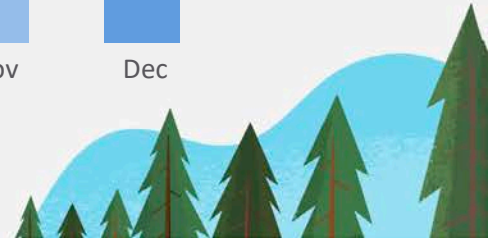
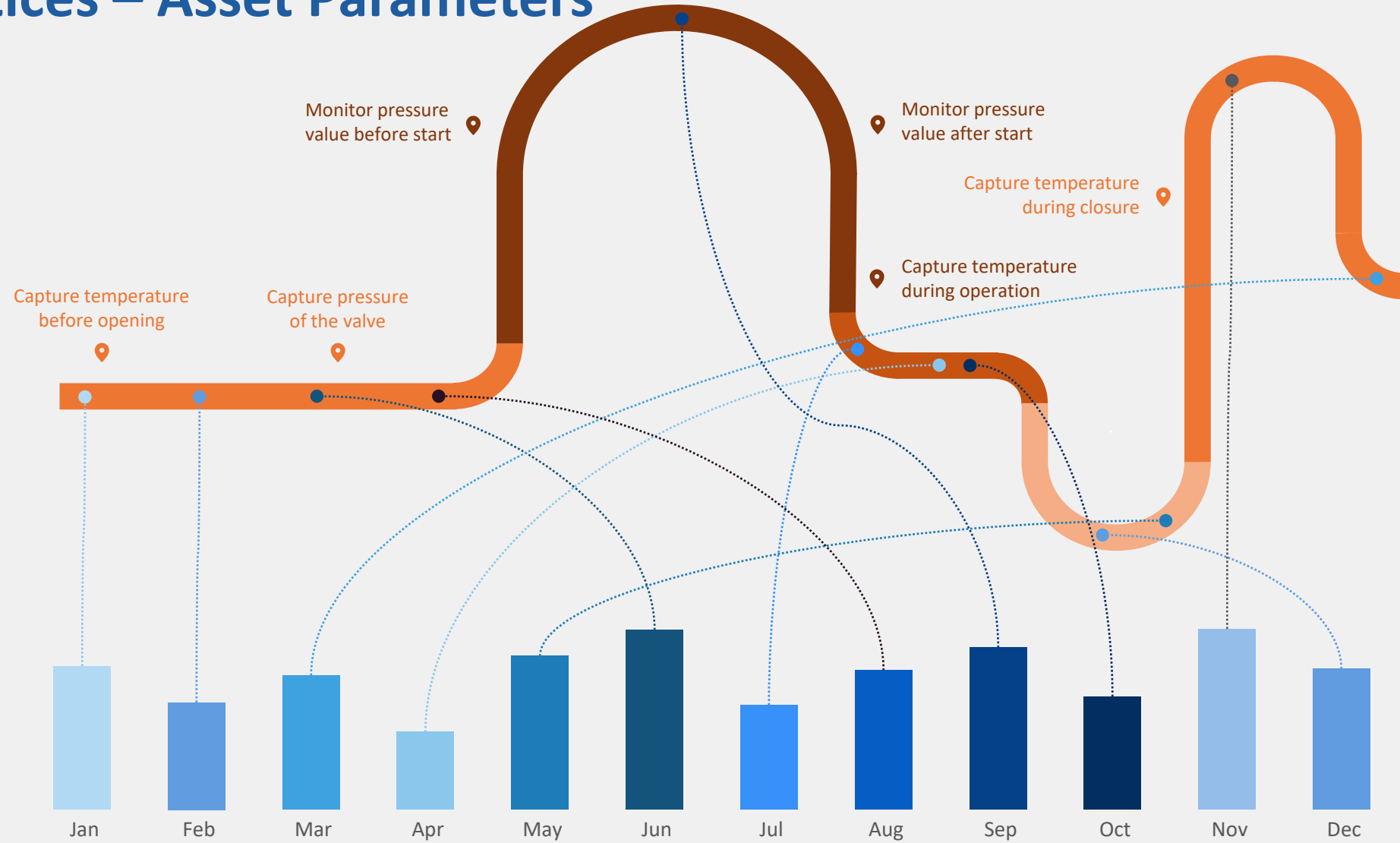
150 Assets worked / day



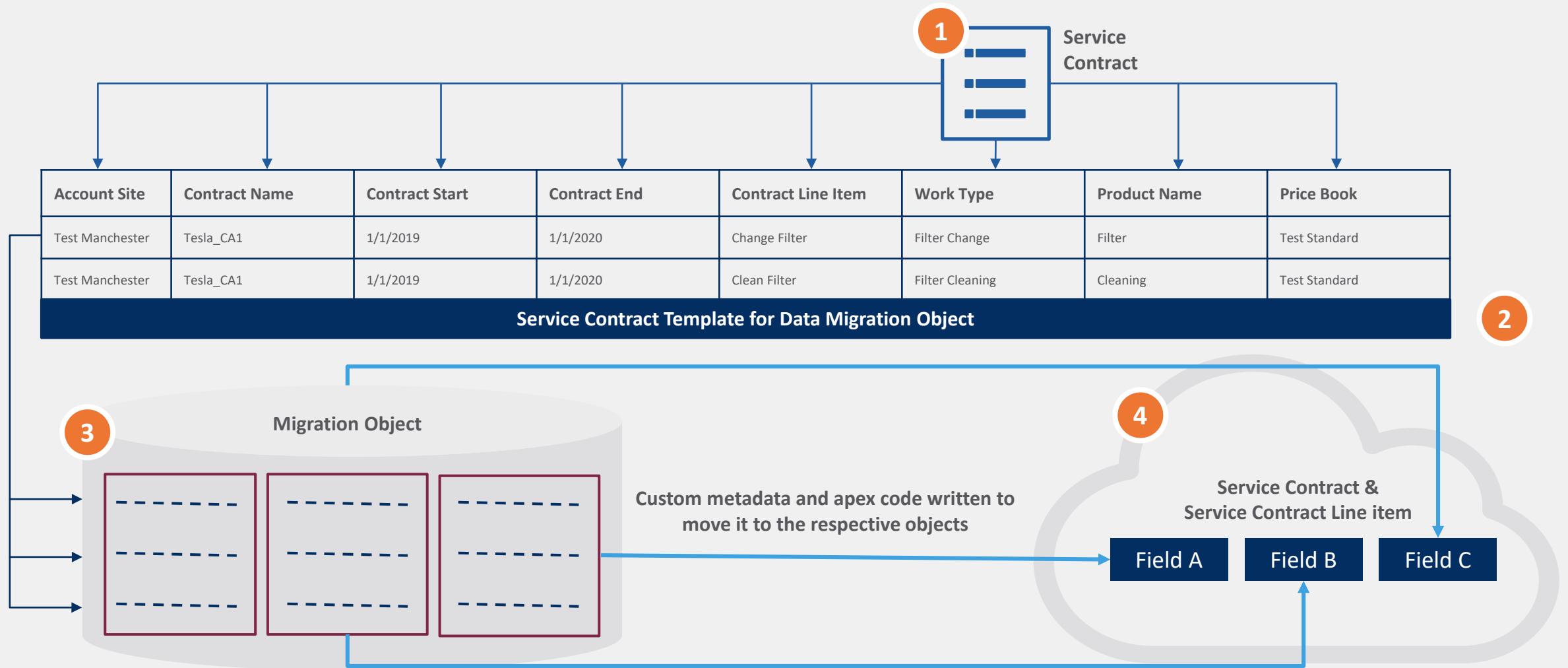
\* FM: Facility Management



# Best practices – Asset Parameters

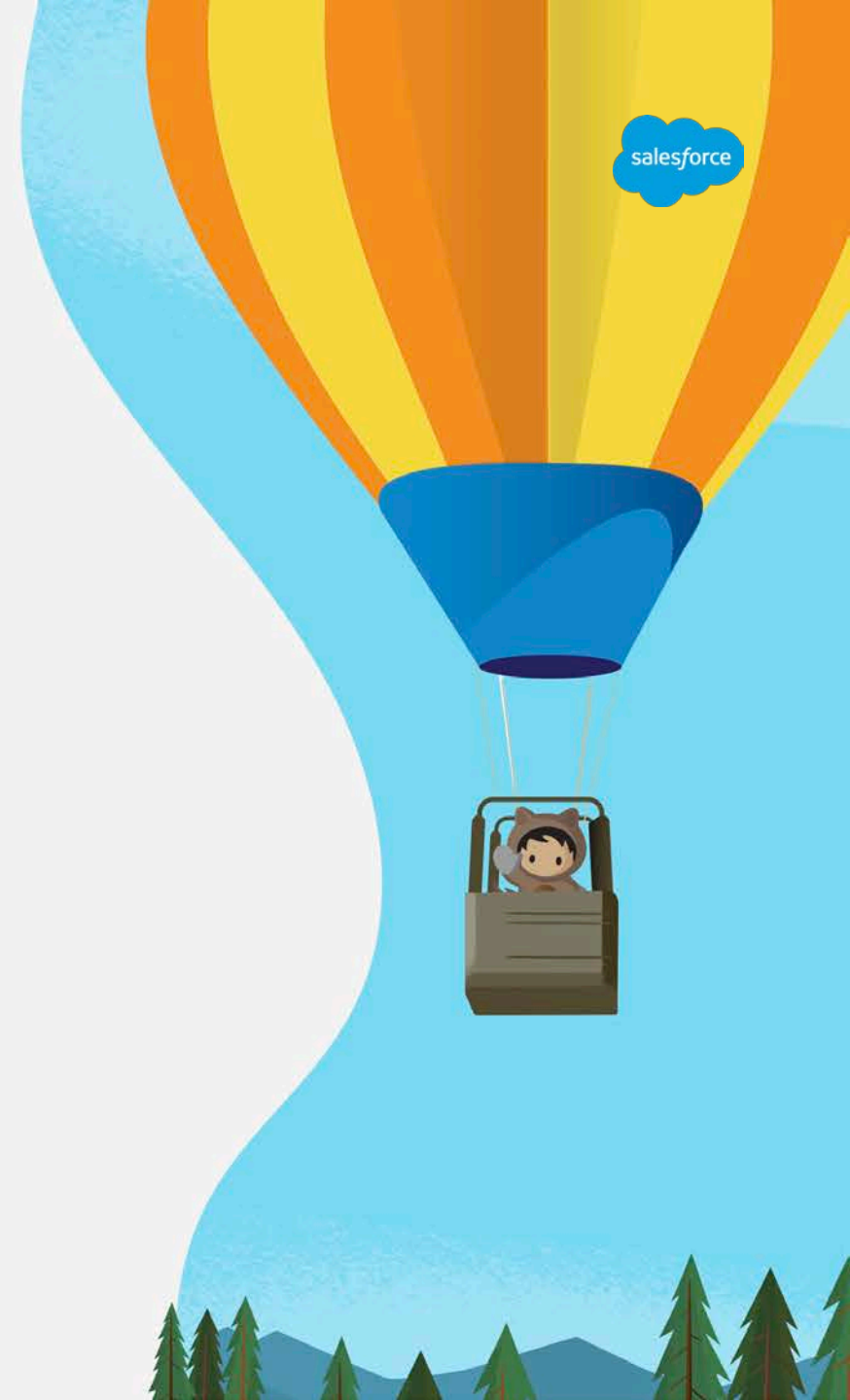


# Best practices – Data migration for field service implementation



# Key takeaways for you

1. Process harmonization before starting technology implementation
2. Enablement phase to have faster Field Service Lightning rollout
3. Step by step introduction into Field Service Lightning
4. Reaping the complete benefit of the Salesforce platform by having end to end solution – **Sales, Service** and **Field Service** on one common global platform.







Thank  
you

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YOUR  
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