

From Paper to Real Time: Elevating Turbine Operations with Salesforce Automation



The Customer

The customer is a global leader in the steam turbine manufacturing industry, operating across multiple countries and serving a wide range of industries. Despite its prominence, the company struggled with fragmented and duplicate customer account data in its Salesforce system, impacting their ability to manage customer relationships, track assets, and generate accurate reports.

The Challenge

The manufacturer encountered several critical operational challenges:

- **Manual and Disconnected Processes:** Field engineers lacked a mobile solution to create and manage protocols efficiently.
- **Coordination Gaps:** Monitoring field service activities and coordinating between Remote Service Coordinators (RSCs) and Field Service Engineers (FSEs) was cumbersome.
- **Traceability Issues:** Difficulty in tracking critical actions and service history led to inefficiencies.
- **Time-Consuming Reporting:** Generating daily, weekly, and site reports was labor-intensive and prone to delays.

The Solution

CriticalRiver designed and implemented a robust Salesforce Field Service Lightning (FSL) solution to address the company's challenges:

- **Streamlined Work Order and Protocol Management:** Work Orders and associated protocols were configured for seamless creation and tracking through Salesforce and the FSL mobile app.
- **Mobile App Deployment:** Field engineers were equipped with FSL mobile apps to manage service appointments, log comments, and capture digital signatures directly from customers.
- **Enhanced Knowledge Management:** A centralized repository of FAQs, case studies, and troubleshooting guides was made accessible to field engineers, linked to relevant work orders and assets.
- **Advanced Customizations:** Custom fields, record types, workflows, and approval processes were developed to support the company's specific business requirements.
- **Real-Time Coordination:** FSL configurations enabled RSCs to monitor FSE activities, track leaves, and oversee service appointments in real-time.

The Results

CriticalRiver's FSL solution transformed the company's field service operations, ensuring:

- A streamlined, mobile-first process for field engineers.
- Improved data accuracy for better decision-making.
- Enhanced customer engagement through efficient and consistent service delivery.

Impact Delivered

- 40% Faster Work Order and Protocol Creation
- 35% Improvement in Field Service Coordination Efficiency
- 100% Digital Protocol Management with Real-Time Updates

Solution Components

- Salesforce Service Cloud
- Salesforce Field Service Lightning (FSL)
- Salesforce Mobile App
- Custom Apex
- Lightning Web Components (LWC)
- Document Builder Templates