

Revolutionizing Service Appointment Scheduling for Rapid Installations



The Customer

Trusted Smart Security for Homes and Businesses

A leading U.S. smart home security provider and part of a nationally recognized not-for-profit service federation delivers trusted security and automation solutions across residential and commercial segments, backed by a strong member network and service-driven reputation.

Impact Delivered

- 50% reduction in IT license costs
- 70% reduction in manual processes
- 40% increase in installation efficiency

The Challenge

The client faced operational inefficiencies due to:

- High reliance on manual processes
- Increased technician costs and travel expenses
- Difficulty in scheduling professional installation sessions
- No solution for flexible customer appointment scheduling

Solution Components

- FSL,
- Service Cloud
- Sales Cloud
- Experience Cloud
- Dealer Communities

The Solution

Integration of FSL and Sales Cloud, leading to a new user-friendly FSL mobile application

- Processes configurations like:
 - Scheduling policy and Work Rules
 - Defined Service Territories, Resources, and Operating Hours
- A flow-based application with LWC and guest community service components
- Automation of scheduling and Quote Approval processes
- Salesforce CPQ package for quotation formulation

The Results

- Reduced manual processes, notably in service appointment cancellations
- Improved road layouts for quicker technician travel
- Quicker revenue recognition from efficient installations
- Customer access to Guest Community, lowering costs and IT license needs
- More flexible service appointment scheduling, enhancing operational efficiency