SERVICEONE
Dealer Advantage

Visit the Dealer’s Corner

<<<Presenter’s Name>>>
MEET THE TEAM

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Magic Quadrant for Customer
Engagement Center

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COMPONENTS OF FIELD SERVICE ARE OFTEN DISCONNECTED

- CRM
- FORMS
- EXCEL FILES
- INVENTORY DATABASES
- DBS
- SPREADSHEETS
- KNOWLEDGE BASE
- THIRD PARTY VENDORS
EVERYTHING TOGETHER ON ONE PLATFORM

CONNECTED CUSTOMERS

INTELLIGENT FIELD SERVICE

EMPOWERED WORKFORCE

Service  Sales  Community  Integration  IoT  Trailhead  Einstein  Industries  Analytics

Integrated Platform
INTELLIGENT SCHEDULING AND OPTIMIZATION FOR DISPATCHERS

Easily manage and monitor all employees in the field

Manage work with the Dispatcher Console
Get a 360 degree view of all service appointments

Assign work based on business rules
Ensure the right job is assigned to the right resource

Get complete visibility into jobs
Track and divide work based on geography

Optimize resource schedules with one click
Automatically remove gaps to improve utilization
CUTTING-EDGE, OFFLINE-FIRST MOBILE TECHNICIAN EXPERIENCE

Customizable, easy-to-use iOS and Android apps built with mobile workers in mind

Access and update information when offline
View job details from anywhere without network connectivity

Collaborate with employees using Chatter
Access knowledge articles and communicate with experts

Manage inventory in real time
Scan equipment barcodes and update your inventory

Generate service reports on site
Capture customer signatures right on the work order
Unlock Two-way Conversational Mobile Messaging

Built natively into Service Cloud, the World’s #1 intelligent customer service platform

Deliver helpful experiences that are effortless
Conversational support via SMS, Facebook Messenger & More

Drive agent productivity
Multi-conversation management, omni-channel routing & bots

ROI that you can measure
Decrease call volume & cost per interaction

Conversational messaging connected to CRM
Quick Implementation & in-context conversations

25% to 50% cost savings vs voice
Quickly create and track work orders via the Service Cloud Console and mobile

- Track standard maintenance jobs or other appointments in the field
- Integrated with Accounts, Contacts, Assets, Cases, Entitlements, and other objects
- Instantly view Knowledge articles and track SLA compliance with Milestones
- Work Order Line Items deliver job details on via desktop & mobile
POWERFUL SELF-SERVICE

Start by helping customers resolve issues fast on web and mobile properties

Enable Customers to Find Answers Fast
Embed knowledge articles and cases in your public website

Put Data at Your Customer’s Fingertips
Connect business process and 3rd party systems to a customer portal

Turn Customers Into Trusted Advisors
Create a branded space where customers meet and collaborate
Automate Approvals
Advanced workflows

Accelerate Negotiation Process
Pre-approved terms and conditions

Apply the Best Price
Discounts, volume pricing

Configure and Price

Amend and Renew

Order

Quote and Contract

Bill and Pay

Analyze
Unlock Back-Office Data with API Layer
Synchronize order, invoice, and product information from DBS with out-of-the-box connectors and integration templates

Drive Greater Rep Productivity
Easily surface real-time data through sales channels and automate workflows to place and update orders

Uncover Richer Sales Insights
Fuel Sales Cloud dashboards, reports, and Einstein predictions with third-party and legacy system data
WHY DO CUSTOMERS SELECT FIELD SERVICE LIGHTNING?

1. END TO END SERVICE
Huge value in FSL running on the same platform and object model as Service Cloud, extending great service into the field

2. COMPLETE PLATFORM
The Salesforce Platform allows our customers to configure and tune FSL to work for their use cases

3. BEST-IN-CLASS RESOURCE SCHEDULING
We tackle complex and simple resource scheduling scenarios for customers of all sizes and industries

4. NATIVE, OFFLINE-FIRST MOBILE EXPERIENCE
We bring a fresh, offline first user experience for mobile workers with embedded guidance
Placeholder video till YouTube link is obtained
DEMONSTRATION

Michael Marshall
Solution Engineer
Salesforce Customer Success Platform

Declarative
Fast App Dev & Configuration
Programmatic
Scale for Growth
Data & Objects
Mobile
Collaboration
Analytics
Workflow
Identity
Open API
Intelligence & Data
Open Ecosystem & Partner Network
Flexible, Scalable, Metadata Platform
IoT
Social
ERP
Other
Lightning Platform

3x Annual Releases
Subscription Based
Customer Success
Trusted Tenant Cloud
Salesforce Advantage
Sales
Service
Marketing
Commerce
Communities
Collaboration
Industries
Integration
Trailhead
Analytics
APPExCHANGE: INSTALL PRE-BUILT APPS & COMPONENTS

A faster & smarter way to find the right solution to extend the world’s #1 CRM

Ready-to-Install Options:
Get apps, components, consultants, Lightning Data, & Bolt Solutions

Industry Expertise:
Extend Salesforce with specific solutions for your industry

Personalized Discovery:
Discover unique recommendations with intelligent search

Trailhead Learning:
Learn best practices with integrated content & Trailhead

1K+ SALES SOLUTIONS  5M+ INSTALLS  70K+ PEER REVIEWS
- Unified data from any source
- Manage all Accounts, Contacts & Leads in one place
- Integrated with dealer ERP
 SERVICE QUOTING

- PSEs direct from CAT
- Opportunity management
- Fast estimate generation
- Built in artificial intelligence

poweredbycat.salesforce.com
- Notifications
- View and Accept Estimates
- Collaborate with Dealer
- Self-Schedule Service
- PSEs direct from CAT
- Opportunity management
- Fast estimate generation
- Built in artificial intelligence
- Advance Dispatch Scheduler
- Manage Technicians & Bays
- Field Service Optimization
Optimizing cost to serve, increase Work Order throughput, close loop on Leads, Work Orders, and Assets, and complete mobile experience in the field.

- Push Notifications
- Directions to Job Site
- Customer Contacts
- Check-in
- Customer Notifications
- Equipment Details
- Extend Time
- Complete Work
- Sales Referrals
- Time Cards
- Offline Capabilities
Field Service Mobile app includes a time sheets feature that makes time tracking easier to implement, and reduces the need for workers to switch between multiple apps.
- Single view into Business
- In context Insights
- Take Action on Insights
- Seamlessly Integrated
- Prebuilt integrations to dealer and CAT system
- Real-time data sharing
Release 1 provides key service and sales level efficiencies to quickly drive value for Dealers and CAT

**SERVICEONE ADVANTAGE CAPABILITIES**

**Closed Loop Work Order & Opportunity Management**

- Service Scheduling
- Time Tracking
- Work Order Management
- Equipment Management
- Job Skills / Team management
- Lead Capture
- Opportunity Management
- KPI Dashboards
- Automated SMS Updates
- Appointment Self-Scheduling
- Chatbot
- Service Quoting
- Mobile CRM
NEXT STEPS

01. Deep Dive on Business Process
02. Deeper Dive on Solution Capabilities
03. Hands On POC
04. Basic Training on Solution
THANK YOU!
## ServiceOne "No Touch" Dealer Package

<table>
<thead>
<tr>
<th>Capabilities</th>
<th>Roles</th>
<th>Dealer Bundle</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales / SFA</td>
<td>Dealer Sales</td>
<td>75</td>
</tr>
<tr>
<td>Field Service</td>
<td>Technicians, Dispatchers, Service Managers</td>
<td>500</td>
</tr>
<tr>
<td>Field and Sales Dashboards &amp; Insights</td>
<td>Sales and Service Managers</td>
<td>50</td>
</tr>
<tr>
<td>SMS/ChatBots</td>
<td>Overall Dispatch and Customers</td>
<td>N/A</td>
</tr>
<tr>
<td>Quoting</td>
<td>Service Quoting</td>
<td>250</td>
</tr>
</tbody>
</table>

**Dealer Pricing Only** $xx

### Key benefits:
- Full Sales Force Automation for Dealer Sales
- Full Field Service for Technicians, Dispatchers, and Service Mgrs including Mobile
- Complete Analytics for Sales and Service
- CTI Integration, Omni-Channel, Full Automation, SMS, Chatbots
- Marketing Automation
- Service Quoting
- Implementations with data integration

**INCLUDES IMPLEMENTATION (See Implementation Plans)**

**Yearly Fee:** $xx  
Annual includes (software included):

**Proactive (Package updates)**
- Periodic functionality updates/additions
- Validation of application integrity with Salesforce version updates
- Test integrations with Salesforce/Mulesoft updates

**Reactive (Support360 service)**
- Application support (User support)
- Bug fixes
- XX hours per month

**Warranty Period**
- Standard
APPENDIX
**Foundational Package Logical Architecture**

- **Customers**
- **Field Service Users**
- **Support Agents**
- **CAT Dealer Management**

**Community**
- Appointments & Scheduling
- Web-to-Case
- Calendar
- Chat/SMS

**Field Service**
- User Mgt
- Asset Mgt
- Omni Channel
- Territories
- Account Mgt
- Product Asset Mgt
- SMS
- Service Process
- Contact Mgt
- Parts Mgt
- Scheduling
- Field Service Processes
- Opportunity Mgt
- Service Work Orders
- Service Agent Skills
- Workflow & Approvals
- Service Contracts & Agreements
- Inventory Locations
- Mobile Application
- Reports & Dashboards
- CPO+ for Service (Quotes)

**Mulesoft Platform**
- Dealer Mgmt **System (DBS, AX, SAP, etc.)**

**Required accts and assets—bidirectional**
Personalized Service at Scale
Unified data from any source
Connected omnichannel engagement
Field service optimization

Service Smarter with AI
AI-powered agent workspace
Integrated automation & chatbots
Proactive connected service

Easy, Flexible Platform
Easily embedded scheduling on currently website
Fully configurable with clicks, not code
Complete ecosystem

Source: Salesforce Customer Success Survey conducted from 2017-2019. Survey respondents were 3,384 Salesforce customers randomly selected.
Outperform Sales Expectations
Intelligent sales automation for parts and service
High velocity prospecting for preventive maintenance
Ability to have integrated quoting & billing

Sell Smarter with AI
Insight-guided analytics embedded into solution
Predictive forecasting on parts and service

Easy, Flexible Platform
Fully configurable with clicks, not code
Complete ecosystem
Can provide real pivot data access based on roles

Source: Salesforce Customer Success Survey conducted from 2017-2019. Survey respondents were 3,384 Salesforce customers randomly selected.
Unlock and Unify Data Across the Enterprise
Automated security
Intelligent data transformation to and from Helios

Create Smarter Connected Experiences
API & integration marketplace to connect to Dealer ERP and CAT Systems
Pre-built connectors, templates, and accelerators

Easy, Flexible API Platform
Connectivity for on-premise & cloud
Full lifecycle API management
MuleSoft Accelerators for Customer 360

Source: Nucleus Research Guidebook: MuleSoft
### SERVICEONE DEALER TAM/CAT BUSINESS CASE

<table>
<thead>
<tr>
<th>Area</th>
<th>Future State</th>
<th>Benchmarks</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Parts &amp; Service Revenue</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Parts &amp; Service Revenue</td>
<td># of Leads for Parts &amp; Service</td>
</tr>
<tr>
<td></td>
<td>Service sales referral accuracy</td>
<td>Win Rate on Parts &amp; Service</td>
</tr>
<tr>
<td></td>
<td>Predictive churn analytics</td>
<td>Customer Attrition</td>
</tr>
<tr>
<td></td>
<td>Dynamic pricing of parts &amp; service / increase parts volume</td>
<td>Parts &amp; Service Prices/Volume</td>
</tr>
<tr>
<td><strong>Customer Loyalty</strong></td>
<td>Automated self-service</td>
<td>% of First-Time-Fixes</td>
</tr>
<tr>
<td></td>
<td>Reduce troubleshooting steps</td>
<td>CSAT</td>
</tr>
<tr>
<td><strong>Technician Productivity</strong></td>
<td>Mobile 360 dashboards for techs</td>
<td>Mean Time to Repair</td>
</tr>
<tr>
<td></td>
<td>Dynamic dispatch of field techs</td>
<td>Working Time per Day</td>
</tr>
<tr>
<td><strong>Inventory</strong></td>
<td>Real-time parts visibility over network</td>
<td>Stock on shelf</td>
</tr>
</tbody>
</table>

THANK YOU!