

Transforming Pump Service with Intelligent Automation

CLIENT

A global pump manufacturing and fluid management company based in North America. They design and deliver pumps and fluid systems for heavy industry, utilities, and commercial customers around the world.

CHALLENGE

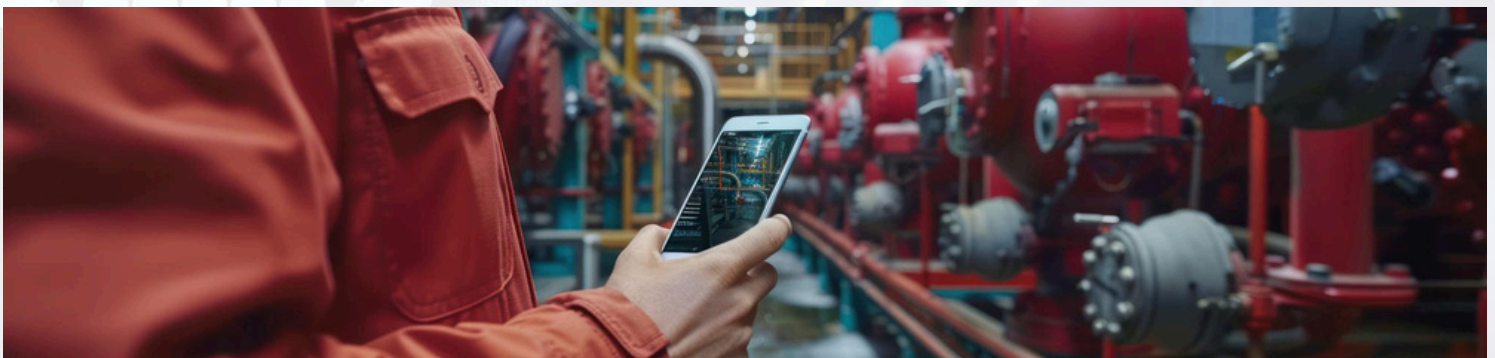
On paper the client had everything a field service team needs: skilled technicians, a broad parts network, and decades of engineering know-how.

In practice their service operations were held back by manual processes that frustrated technicians and customers alike.

Technicians were scheduled by hand, dispatchers managed routes from spreadsheets, and parts availability was checked by phone. That meant technicians sometimes arrived at sites without the right spare parts, customers waited without timely updates, and managers could not see what was happening in the field until the job was closed.

The consequences were clear: longer repair times, repeated visits, stressed teams, and unhappy customers.

They wanted predictable service windows, higher first-time fix rates, fewer wasted trips, faster invoicing, and customers who felt informed and confident throughout the service experience.



SOLUTION (STEP BY STEP)

Together we built a practical, people-first system using Salesforce Field Service Lightning integrated with the client's SAP ERP.

The goal was to remove friction from everyday work and give technicians and customers the right information at the right time.

- **Smart Scheduling**

We automated technician assignments, so the right person is sent to the right job based on skills, certifications, and current location. No more manual match making.

- **Mobile Access for Technicians**

Each technician received a compact mobile app that showed job details, site notes, directions, and digital forms. The app felt like a natural extension of their workflow, not an extra burden.

- **Live Inventory Tracking**

Real-time integration with SAP ERP meant spare part status was visible to dispatchers and technicians. If a part was out of stock, the system suggested alternatives or reallocated parts from nearby depots.

- **Customer Engagement**

Automated SMS and email notifications informed customers about technician ETA, work in progress, and job completion. Simple, timely communication replaced the uncertainty customers previously experienced.

- **Digital Job Closure**

Jobs were closed with e-signatures and digital invoices on site. Paperwork disappeared, billing accelerated, and customers received receipts instantly.

EXECUTION PROCESS

We began with onsite discovery sessions where technicians and dispatchers showed us the real daily pain points. Those conversations shaped a phased rollout that respected people's routines.

- Phase 1: Discovery and workflow mapping. We watched real job cycles, collected examples of common failures, and prioritized features that would deliver immediate value.
- Phase 2: Configuration and integration. We configured Salesforce Field Service Lightning to mirror their service processes and built the SAP integration for inventory sync.
- Phase 3: Pilot and training. A pilot group of technicians and dispatchers used the system for four weeks. We ran short, hands-on workshops rather than long classroom sessions so technicians learned by doing.
- Phase 4: Full rollout and continuous improvement. After rollout we kept open feedback loops, adjusted rules and routing based on real-world usage, and added small refinements that produced outsized benefits.
- Throughout the project we focused on two simple rules: make work easier for technicians and make service clearer for customers.

RESULTS

The improvements were immediately tangible and sustained:

- Technician productivity increased by 40%. Work cycles were smoother and time on productive tasks rose.
- Travel time reduced by 35%. Better routing and smarter scheduling meant technicians spent more time fixing and less time driving.
- First-time fix rate improved by 50%. Technicians arrived prepared more often, cutting repeat visits.
- Service resolution time dropped by 30%. Faster diagnosis and correct parts reduced downtime for customers.

- Customer satisfaction rose by 45%. Customers appreciated clear ETAs and proactive updates.
- Revenue improved as billing cycles sped up and repeat business increased thanks to reliable service.

A SHORT EXAMPLE FROM THE FIELD

One operations manager told us that where they used to chase technicians and call customers multiple times a day, they now spent that same time solving exceptions and improving preventive maintenance plans.

A technician said the mobile app felt like having a teammate in his pocket: it told him where to go, what to bring, and how to close the job cleanly.

KEY TAKEAWAYS / WHY IT MATTERS

- Real change starts with people. Tools work only when they match how people actually work in the field.
- Integration matters. Linking field service to ERP fixed the single biggest cause of wasted trips: missing parts.
- Small usability wins add up. Quick training, simple mobile screens, and timely notifications drove high adoption and immediate ROI.
- Service is a competitive advantage. For manufacturers, reliable field service converts into stronger customer trust and recurring revenue.

For any company that sends technicians into the field, these lessons hold true: simplify scheduling, make inventory visible, and keep customers informed.

That combination turns service from a cost center into a growth engine.



Want similar results? Let's discuss your project.

Contact Us : www.vionsys.com