



Transforming global field service operations with Salesforce and SAP

This company partnered with TELUS Digital to modernize its global field service operations, replacing fragmented, Excel-driven processes with a unified, scalable service delivery platform. Rapid growth, increasing regulatory complexity, and highly specialized service requirements exposed operational gaps across scheduling, estimating, parts visibility, and reporting, which created unnecessary risk.

By implementing an integrated Salesforce Field Service and SAP solution, TELUS Digital enabled the client to standardize service execution, automate resource planning, and gain real-time operational and financial visibility. The result was a future-ready field service operating model that reduced manual effort, improved workforce utilization, and positioned the organization to scale global service delivery with confidence and control.





CHALLENGES

Scheduling and resource optimization: Heavily manual, fragmented scheduling created systemic risk. This drove resource burnout, compliance exposure (days-in-country tracking), and skill mismatches that jeopardized safety, morale, retention, and customer delivery.

Estimating and expense management: Excel-dependent estimating and expense workflows slowed quoting, increased accounting friction, and obscured real-time cost visibility. This undermined financial control and margin management during project execution.

Parts and inventory visibility: Fragmented inventory and logistics processes limited visibility into parts availability and lead times, triggering job reschedules, backlogs, and inefficient manual handling of spare parts ordering and returns.

Documentation and reporting: Lack of mobile access and standardized reporting tools forced manual data entry and inconsistent outputs, delaying deliverables, increasing error rates, and diminishing the professionalism of customer-facing documentation.

SOLUTION

TELUS Digital implemented a customized solution to replace manual, disconnected workflows with a scalable, automated operating model that improved resource efficiency, financial control, and service execution end to end.

- **Salesforce Service & Field Service (SFS):** Implemented an automated, rules-driven dispatch and mobile execution model that replaced Excel-based planning with real-time capacity, skills validation, conflict prevention, and offline-enabled technician productivity.
- **MuleSoft Integration (Salesforce ↔ SAP):** Established a real-time, bi-directional integration layer between Salesforce and SAP to deliver end-to-end parts visibility, synchronized financial data, and streamlined expense and reconciliation workflows.
- **SAP Parts Program & Data Optimization:** Standardized and cleansed core parts and assembly data while enabling advanced, asset-centric search capabilities to ensure accurate, actionable insights across integrated systems.

The outcomes of this project included:

Global Standardization: Unified processes across four major global regions on a single platform.

Operational Efficiency: Automated the generation of service reports and field documentation, reducing administrative lag.

Compliance and Retention: Improved the ability to monitor technician well-being and international compliance, directly addressing morale and turnover concerns.

Cost Reduction: Improved local team assignment logic to ensure cost-effective scheduling.