

Regaining operational control to scale installation delivery with Salesforce Field Service

A market leader in remote tank monitoring was scaling at an aggressive pace alongside the largest tank holders in the country. Rapid growth exposed operational cracks in how installation demand was planned, scheduled, and executed across internal and third-party teams. To sustain momentum and protect revenue, this client needed to regain operational control and SLA confidence fast.





CHALLENGES

Manual appointment intake and scheduling: Excel-based uploads and disconnected systems created inefficiencies, errors, and delays that could not scale with demand.

Fragmented routing and assignment model: Multiple tools were used to route and assign work, resulting in suboptimal prioritization and inconsistent execution across internal and third-party installers.

Limited field visibility and accountability: Lack of real-time insight prevented the client from holding third-party installation partners accountable to contractual commitments.

SLA and financial risk exposure: Poor visibility and manual processes increased the likelihood of missed SLAs, triggering financial penalties and eroding customer trust.

SOLUTION

TELUS Digital implemented a centralized Salesforce Field Service solution that unified appointment intake, intelligent scheduling, and real-time field visibility to restore operational control and enable scalable growth.

- Conducted a comprehensive assessment of the client's existing business processes and redesigned workflows to enforce standardized field protocols.
- Deployed Salesforce Field Service (50 licenses), leveraging out-of-the-box capabilities to centralize service management across internal and external teams.
- Built a custom scheduling and route optimization layer using Google Maps API to dynamically prioritize and optimize installations based on geographic and operational criteria.

The outcomes of this project included:

Established a single command center for managing installation demand, scheduling, and execution across all field resources.

Improved SLA compliance and reduced financial risk by enabling real-time visibility into work status and installer performance.

Enabled data-driven resource planning, allowing the client to accurately assess capacity and scale installation operations proactively.

Positioned the business to scale on its own terms, with systems and processes designed to support sustained growth without operational breakdowns.