



# The Field Service Playbook for Public Sector





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5 steps to modernize public sector field service for greater efficiency



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# Introduction

In the public sector, efficient field service management is not just a priority –it's a mission demand. Picture a city where field service workers fix every pothole within hours, swiftly manage public health emergencies and promptly resolve utility issues. Or imagine an Army base where maintenance issues are quickly identified and resolved. This level of efficiency can transform public sector organizations, building trust and satisfaction among constituents and stakeholders while empowering agencies to deliver mission success.

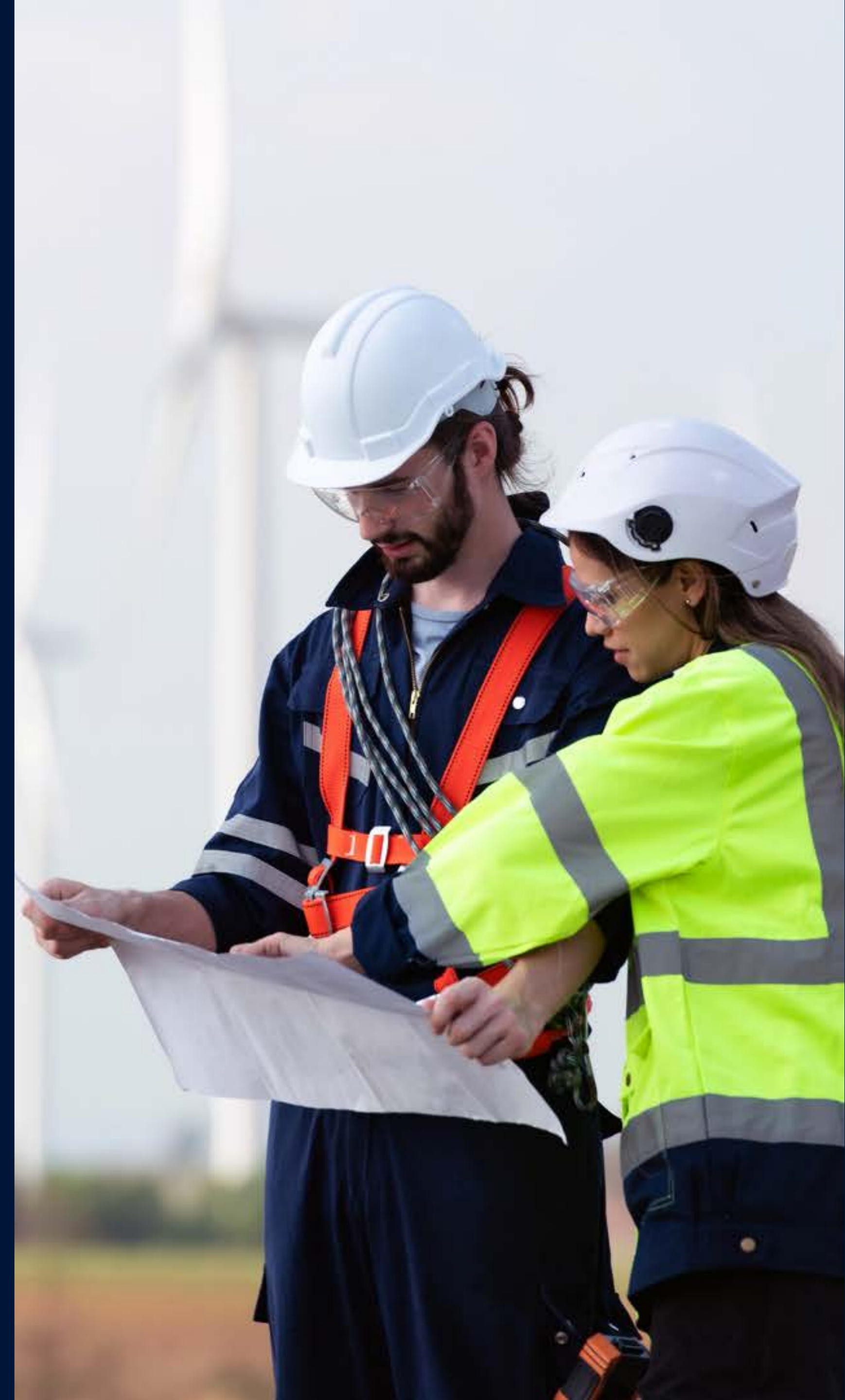
Public sector organizations often grapple with legacy systems, and even paper processes, where key information is siloed across multiple platforms. This fragmentation hampers decision-making and operational efficiency. By integrating data from various sources into a single, cohesive platform for mobile workers, dispatchers and field service managers can gain complete visibility into their operations. This enables them to not only dispatch and respond more effectively to the needs of their communities, but to also implement trusted AI-powered technologies down the line.

Now, more than ever, achieving mission outcomes like efficiency, transparency and flexibility are within reach for public sector organizations.

[Salesforce Field Service](#) unites customer, resource and asset data for public sector agencies to deliver efficient, effective and even proactive service.

“What we see in the public sector is that there are lots of different fragmented solutions that help organizations work with their constituents,” said Paul Whitlam, general manager and senior vice president of field service management at Salesforce. “But with a unified platform that brings information together, we get a full picture of the constituency and mission-need to provide fast and efficient service.”

By leveraging advanced field service platforms, public sector organizations can optimize resource use, enhance decision-making and improve service delivery. This eBook will explore best practices for integrating data and adopting innovative field service management solutions such as [Salesforce Field Service](#).



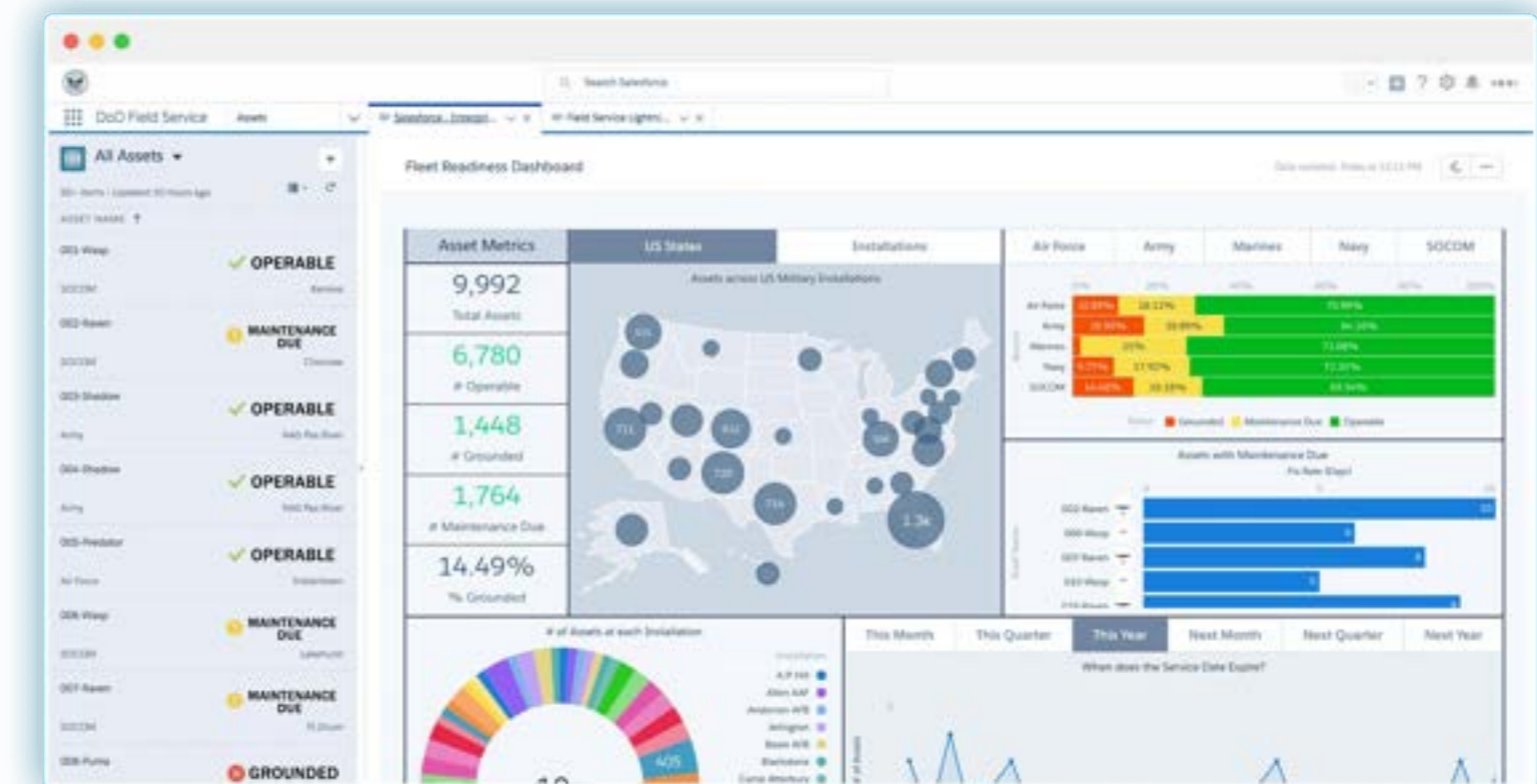
# Chapter 1 Build a complete view.



For public sector organizations, where resources are limited and efficiency is critical, comprehensive visibility into data about constituents, resources and assets is essential for informed decision-making and smooth operations. For instance, a city's public works department manages thousands of service requests daily, from pothole repairs to streetlight maintenance. Without a unified view of all relevant data, coordinating these efforts to respond swiftly and accurately would be nearly impossible.

Creating this unified view involves more than just gathering data; it's about integrating and harmonizing information from various sources. Many public sector organizations rely on fragmented solutions, each handling different aspects of their operations. This fragmentation can lead to inefficiencies, duplicated efforts and missed opportunities. To overcome this challenge, secure, scalable and reusable integrations are necessary to unlock and unify data from legacy systems and external applications.

“Start by looking at your data. Make sure you have your data in order and fully understand the constituents you're serving, their needs, the resources you're working with and the assets you're managing,” said Kacey Heller, director of product marketing for Salesforce. “You need to have visibility into all of that before overhauling your field service operation.”





Ensuring that all relevant data—customer information, asset details or operational metrics—is accessible and well-organized is critical.

“Field service platforms that integrate disparate systems into a unified view enable organizations to enhance efficiency and decision-making,” said Jamison Braun, vice president of business development strategy for Salesforce. “A platform built on the [Service Cloud](#), for example, can provide a holistic view by integrating data from CRM analytics, procurement systems and social platforms.”

Consider a large municipality’s public health department managing health initiatives, emergency response and daily operations. Before partnering with Salesforce, their data was scattered across multiple legacy systems, making it difficult to get a clear picture of resource allocation and service effectiveness. After integrating their data into a unified platform, they were able to streamline operations, prioritize high-impact areas and make data-driven decisions that improved public health outcomes. In other words: they were able to deploy the right healthcare workers with the proper skills to people in need faster than ever, because they had optimized routes and a better understanding of who they were deploying.

This unified data view not only improves internal operations but also enhances the ability to serve constituents effectively. When a department has a clear picture of its data and assets, it can respond more quickly to service requests, reduce downtime and operating costs and maintain public infrastructure more effectively.

## Chapter 2

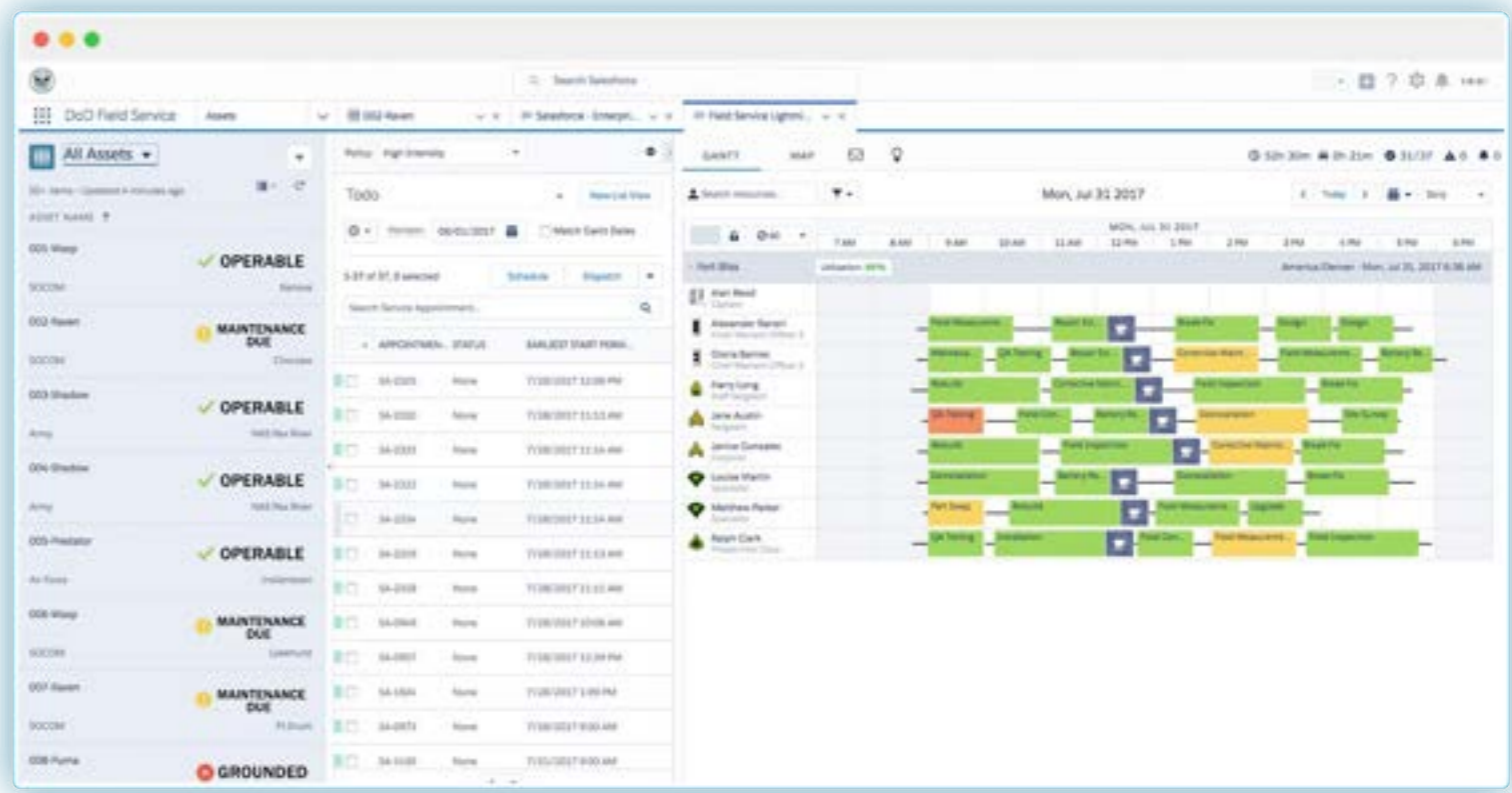
# Generate the optimal schedule.



In the dynamic world of field service operations, where every second counts and precision is essential, efficient scheduling emerges as a critical factor. And for field service operations, particularly in the public sector, the stakes are high. Imagine a busy city where technicians need to respond to various service calls, ranging from urgent repairs to routine maintenance. Delays, inefficiencies and errors can lead to substantial financial losses and erode public trust. In such cases, efficient scheduling isn't just a matter of convenience, it's essential for maximizing technician productivity and ensuring constituent satisfaction.

If you are scheduling your resources manually, achieving the optimal schedule is difficult. Not only time-consuming, manual scheduling is prone to errors, especially in complex operations with frequent unplanned changes. For instance, if a technician is delayed or a customer reschedules, a dispatcher may need to adjust the entire plan for the day. This process can be labor-intensive and increase operational costs. By leveraging technology to automate and optimize scheduling, teams can reduce their truck rolls and save money.

“There are millions of permutations to create a schedule across job sites and mobile workers. Having a scheduling engine that can automatically produce a schedule based on technician skills and optimized routes is critically important,” said Heller. “Optimizing the schedule makes for happier constituents.”





An effective scheduling engine considers customizable attributes such as technician skills, business priorities and optimized routes, ensuring that the right person arrives at the right job with the right equipment. It also weighs those attributes according to specific predetermined priorities. This level of precision not only enhances efficiency but also significantly reduces the manual workload on dispatchers, allowing them to focus on more strategic tasks and emergencies. Moreover, efficient scheduling reduces downtime for technicians and maximizes their utilization.

With [Salesforce Field Service](#), organizations can generate the optimal schedule based on an integrated dispatch console that provides dispatchers with a comprehensive view of all appointments, technician skills and other critical information in one place.

“We’ve developed a very sophisticated way of scheduling that considers all aspects of the work,” said Whitelam. “By being able to look at all of the possible resources, we can run an algorithm that comes up with the perfect schedule for your workforce.”

A prime example of Salesforce’s impact is their partnership with the [City of Chicago on overhauling its 311 system](#). Before implementing [Salesforce Field Service](#), scheduling graffiti cleanup could take up to 45 minutes. After partnering with Salesforce, technicians were able to reduce this time to just 5-10 minutes. When a citizen reports an issue through the 311 system, the platform automatically springs into action, ensuring prompt and efficient resolution. Automated notifications keep citizens informed about the status of their requests and the expected arrival time of technicians, providing peace of mind and transparency, without which many constituents start to lose trust in their government to deliver the services they need. This efficiency is not just a matter of convenience; in a city like Chicago where public events and activities require quick, responsive service, it’s vital for maintaining public order and safety.



## Chapter 3

# Deliver a first time fix, every time.



Over the past decade, field service operations have undergone a dramatic transformation, driven by technological advancements and heightened expectations from the public. Constituents now demand the same seamless experiences they receive from the commercial sector, including the ability to manage their own appointments on their channel of choice, timely arrivals of service personnel, and efficient resolution of issues.

Metrics like first-time fix rates can make or break customer satisfaction. “Your constituents are dealing with private companies all the time, so they expect their public entities to serve them the same way that private companies do,” said Heller. “They’re looking for seamless experiences and expect the job to be done right the first time.”

A higher first-time fix rate means fewer return visits and truck rolls, which translates to reduced labor costs, reduced operations costs like savings on gas, for example, increased mobile workforce productivity, and even lower emissions that can help entities achieve their sustainability goals.

One way to achieve higher first-time-fix rates is by providing full offline capabilities for the mobile tools technicians are using on the job. Field service technicians often face the challenge of working in remote or connectivity-limited areas, so ensuring they can perform their tasks effectively despite these limitations is crucial for maximizing technician productivity.

Salesforce’s mobile app supports offline usage. Mobile workers can view all appointments in a list, map, or calendar and get directions and parts information before heading out, even if they are offline. Once connectivity is restored, the app seamlessly syncs offline data with the central system and preserves all information. Additionally, Salesforce’s priming feature allows technicians to preload a high volume of data onto their devices so they have all the necessary information at their fingertips. This reduces dependence on real-time data fetching and minimizes delays.

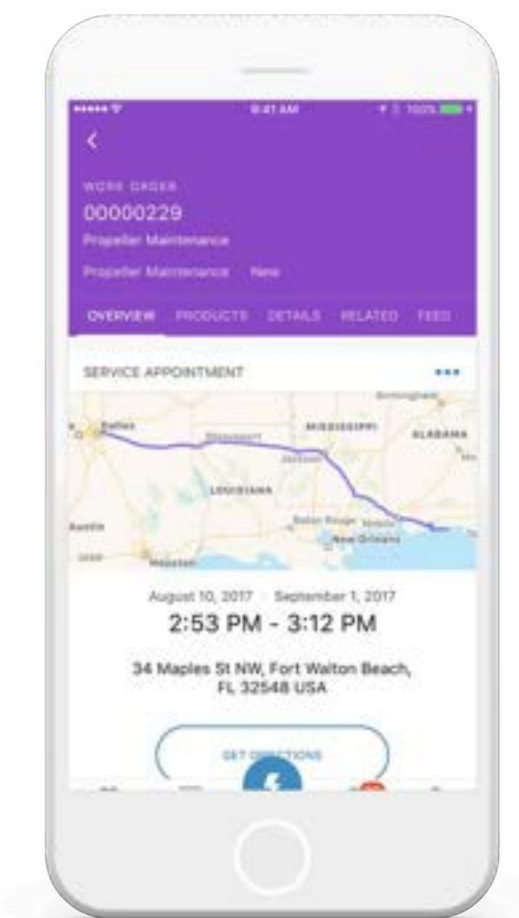


“Technicians need to be able to complete the job with no interruptions,” said Heller. “Offline capabilities are critical to maximize mobile worker productivity.”

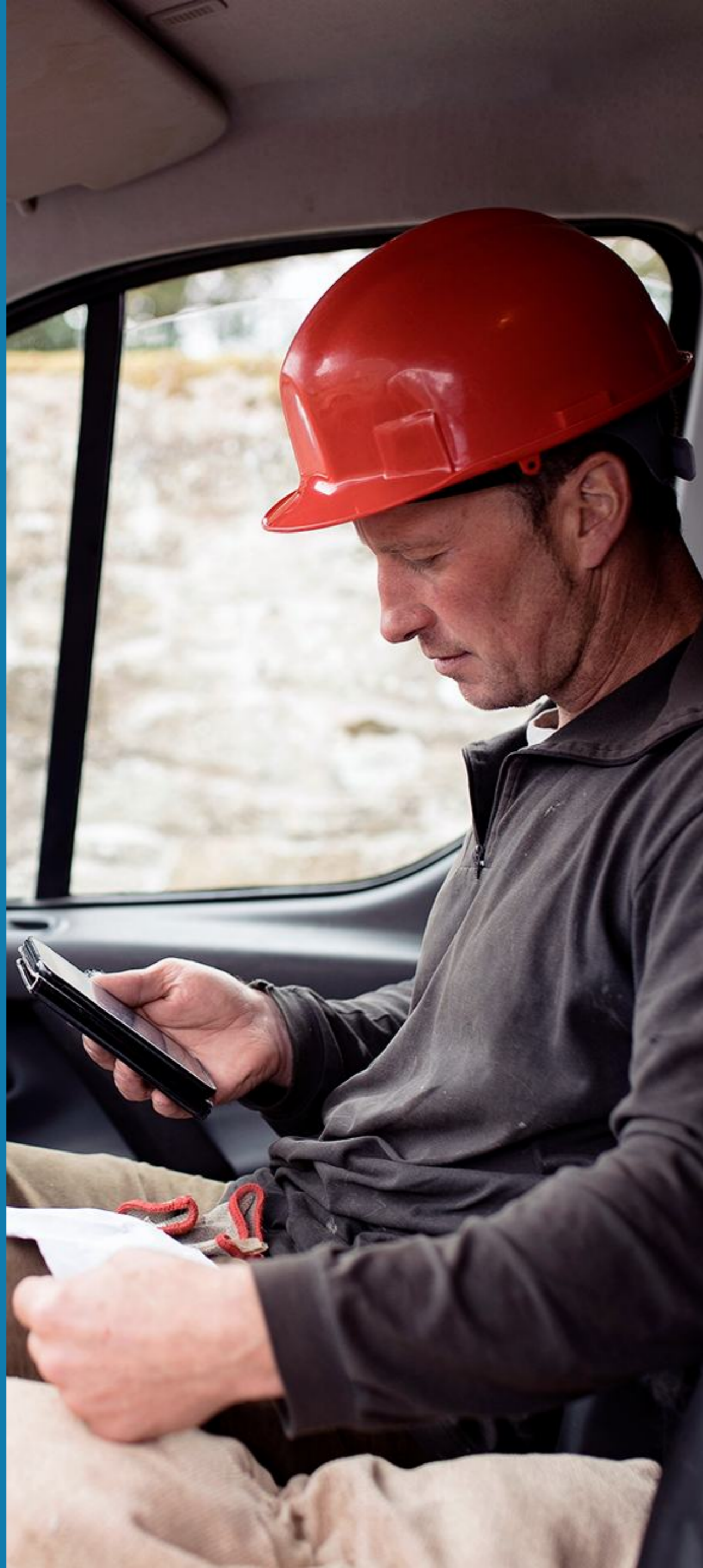
Predictive AI, another game-changer in field service management, can recommend the right tools and parts based on the specific job and location. This capability keeps technicians prepared, minimizing the need for a second visit. Additionally, automated customer communications keep constituents informed about the status of their service requests without the need for manual intervention, enhancing transparency and trust. It also reduces the possibility of a “no show” – the constituent not being available at the time of service—which can be very costly to an organization.

“Our systems are optimized to solve all of those different characteristics of work that needs to be done, ensuring the right person is at the right place at the right time with the right skills and the right tools to get it done right the first time,” said Whitelam.

By leveraging these advanced features, public sector organizations can achieve higher first-time fix rates, resulting in more satisfied constituents and more efficient operations. [Salesforce Field Service](#) not only enhances the productivity of the mobile workforce but also ensures that every service request is handled with precision and care, ultimately transforming how organizations deliver public services.



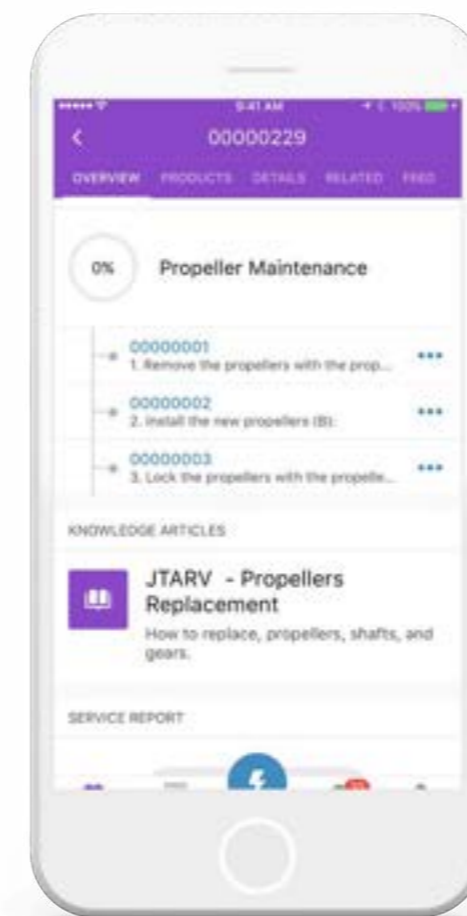
## Chapter 4 Intelligently manage work and assets.



From maintaining critical infrastructure to delivering essential services, field service organizations rely heavily on physical assets—such as diagnostic equipment, GPS devices, machinery, and service trucks—to fulfill their missions. Managing these assets effectively is no simple task. It requires meticulous planning, real-time insights, and proactive strategies to ensure optimal performance and longevity. Without proper management, these assets can quickly become liabilities; with every asset that experiences downtime, entities endure higher maintenance costs and customers experience diminished service quality.

At its core, effective asset management ensures that assets are operating at peak performance, minimizing downtime, reducing maintenance costs and extending their lifespan. By gaining a comprehensive view of asset details, including service history, performance metrics and location, organizations can make informed decisions that optimize asset use and drive operational efficiency.

The true power of asset management, however, lies in its ability to transform field service operations from reactive to proactive. With the integration of real-time data into maintenance operations, organizations can take asset management to the next level.



Real-time insights enable organizations to proactively monitor and manage physical assets, identifying issues before they escalate and disrupt operations. For example, if a generator's temperature exceeds a certain threshold, the system can automatically generate a work order for inspection and maintenance. This proactive, asset-centric approach to field service not only reduces downtime and maintenance costs but also enhances overall service reliability.



“A key differentiator for [Salesforce Field Service](#) is our asset service management,” said Heller. “By unifying asset and customer data into your flow of work you can maximize asset uptime and revenue.”

But the benefits of effective asset management extend beyond just cost savings and operational efficiency. With Salesforce's field service solutions, organizations can automate routine tasks, such as automatically sending firmware updates as a first step to an issue, recommend optimal solutions based on real-time data, and ensure that technicians deliver first-time fixes.

“In government, time is power. So the ability to shrink the decision-making and flatten that cycle for all layers within the field service industry is super important,” said Braun. “[[Salesforce](#)] [Field Service](#) ensures predictability and efficiency for technicians. They have the knowledge and tools to solve problems on the first call, enhancing job satisfaction and retention.”

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**Jamison Braun,**  
VP, Business Development Strategy for Salesforce

## Chapter 5

# Foster trust and reliability.



In the public sector, where data security and compliance are paramount, the importance of working with trusted partners cannot be overstated. Especially when it comes to field service, the reliability of these services hinges not only on the skillset of the technicians but also on the trustworthiness of the technology and partners behind them.

Organizations need partners that prioritize trust and reliability, ensuring that all operations are secure and compliant with public sector standards. This is particularly crucial when dealing with sensitive data, such as maintenance schedules, asset management and operational logistics. The stakes are high and the potential impact of data breaches or service disruptions can be significant.

Public sector organizations face unique challenges, including stringent regulatory requirements and the need to maintain public trust. “Public sector organizations must partner with technology companies that are reliable and trustworthy, valuing trust above all else,” said Heller.

Trust and compliance form the bedrock of effective public service and FedRAMP authorization plays a critical role in establishing these standards by ensuring that field service platforms meet stringent security criteria.

Moreover, FedRAMP authorization provides a framework that helps public sector organizations evaluate and select cloud service providers that can securely handle their data. This level of scrutiny helps to ensure that networks are secure, protecting sensitive information from cyber threats and unauthorized access while enabling agencies to operate with a higher degree of confidence.

[Salesforce Field Service](#) meets [FedRAMP High](#) and DoD Impact Level 4 & Level 5 compliance requirements, ensuring complete control over information leaving the application perimeter, addressing U.S. federal security standards and providing a highly secure environment.



With their robust security measures and commitment to trust, transparency and accountability, Salesforce provides the tools necessary to enhance service delivery and protect sensitive data, ensuring that public sector organizations can serve their constituents effectively and securely. Since Salesforce is built on one platform, other Salesforce solutions can be easily added to further improve mission outcomes. The [Einstein Trust Layer](#), for instance, ensures that AI-driven insights are reliable and secure, while [Data Cloud](#) unlocks trapped data.

Additionally, real-time updates and comprehensive service request tracking on the [Field Service](#) platform ensure that citizens and government officials are informed throughout the process, improving public trust and holding service providers accountable for their performance. Consider a scenario where a resident reports a broken streetlight. With a transparent and accountable system, the resident receives real-time updates about the status of their request – from dispatching the technician to repair completion.

By focusing on trust, transparency and operational efficiency, Salesforce's Field Service platform helps public sector organizations enhance service delivery, protect sensitive data and build stronger, more reliable relationships with their stakeholders.

“When you have trust and transparency, it really elevates the conversation and the maturity to a level of objective decision-making,” said Braun. “We use data then as the foundation of truth and we can create business processes that make the optimization of that data and ultimately the speed of mission that much more enhanced.”

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[Learn more](#) about how Salesforce is helping modernize field service in the public sector.

See a Public Sector [guided tour](#) of Salesforce Field Service.





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