

Field Service Management in Zoho CRM for a Healthcare client

Problem Statement:

- The franchisee department of the organisation required an FSM setup for its field team.
- They wanted the setup within CRM, where the field team can use the leads and meetings module to enter prospects and capture their field visit information as well

• Solution:

- We set up Zoho CRM and fine-tuned it for the FSM use case.
- Geolocation for each lead was captured. For every subsequent field visit and check-in, the system calculates the distance to the lead's location and validates whether the visit was done at the location or not.
- Blueprints were developed so the stage could be marked for every visit by the field representative.
- Extensive training was given to the field team to use the Zoho CRM mobile application.
- Integration done with Dialshree calling software for logging calls into Zoho.
- Detailed Analytics were set up within Zoho CRM for the management to preview FOS performance.

KEY FINDING:

- IMPROVED TRANSPARENCY AND ACCOUNTABILITY IN FIELD OPERATIONS.
- ENSURED ACCURATE AND LOCATION-VERIFIED REPORTING.
- STREAMLINED AND STANDARDISED FIELD VISIT PROCESSES.
- INCREASED PRODUCTIVITY AND EFFICIENCY OF FIELD TEAMS.
- PROVIDED REAL-TIME VISIBILITY INTO FRANCHISEE ACQUISITION PERFORMANCE.

CONCLUSION:

BY LEVERAGING ZOHU CRM AS A UNIFIED FSM PLATFORM, THE ORGANISATION SUCCESSFULLY DIGITISED ITS FIELD OPERATIONS, ENHANCED PROCESS CONTROL, AND GAINED ACTIONABLE INSIGHTS LEADING TO MORE EFFICIENT AND SCALABLE FRANCHISEE EXPANSION.