

Salesforce + Youreka Combo Accelerates Assessments, Enables Targeted Marketing

Flexco, a Downers Grove, Ill.-based manufacturer of conveyor fastening systems, components, parts and tools, also offers customers a valuable maintenance service: detailed assessments of their conveyors in the field. Flexco service agents used a home-built application for these inspections.

The application, however, had several frustrating deficiencies, including the inability to filter by use/type and quickly find specific parts. Service agents needed to scroll through as many as 70 pages to find part info and, as a result, assessments were taking too long to complete.

Challenge

With Flexco's existing Salesforce Sales Cloud solution as a foundation, the all-new assessment solution required the implementation and integration of Youreka (a Salesforce-native tool for field service teams), the creation of a custom asset hierarchy and objects structure, and the development of custom forms.

Solution

The new, more intuitive phone/tablet assessment tool uses out-of-the-box functionality to manage account and asset info, guide the assessment process, enable filters (industry, application, light-duty vs. heavy-duty, part type/use, etc.), provide make/model info, and allow detailed descriptions of the issue and repair needed.

Results

The result is more efficient and highly detailed assessments, and the ability to perform more assessments per day. Perhaps most important, Flexco is able to gather accurate and up-to-date information on its products in the field – data it uses for targeted marketing campaigns that drive significant revenue growth.

Conveyor parts maker shortens time to do field assessments of in-use products, delivers timely, critical maintenance information to customers, and gains valuable data for marketing.



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