



## CASE STUDY

# MICROSOFT DYNAMICS 365 FIELD SERVICE

## CLIENT SNAPSHOT

“As our focus has shifted from being primarily a “service” business to a company with a Customer Centric focus, we needed to change the way we do business on all fronts. This includes, but is not limited to, implementing an enterprise-level system such as Dynamics 365 Field Service. We paired Dynamics 365 Field Services with the new Microsoft-based Resource Scheduling Optimization (RSO) solution implemented by Plus+ and have immediately recognized amazing results. The platform and solution launched here at UHS on Feb 10th, and by the end of February, the productivity and efficiency of our Field Services team had already increased by 20%. We will continue to work with Plus to innovate and enhance our business results.”

-Nick Liimatta - Senior Finance Manager  
Ultimate Home Services, LLC

## ABOUT UHS

Ultimate Home Services, LLC (UHS) is an Ohio based company that partners with a leading international home improvement retail company, servicing 268 locations in 12 states to provide measurement services, installation, and postinstallation support for floor-covering projects.

## BUSINESS CHALLENGES

UHS needed to transform their field service business by automating their scheduling and optimizing their resource utilization. The company was dependent on a legacy scheduling system to plan workloads and daily routes for their field technicians. The system was largely manual and lacked key features that UHS needed to streamline their business.

## THE SOLUTION

- Implement Microsoft Dynamics 365 Field Service with Resource Scheduling Optimization (RSO).
- Leverage Microsoft Power Automate, Bing Maps Integration, and Power Apps to extend Field Service for customers and technicians.
- Integrate solution with multiple systems, including Business Central and a custom service hub.
- Create view of project hierarchy to allow instant access to all files across related projects.
- Enhance productivity by building a tool to allow users to instantly clone projects.
- Deliver customer-facing Power Apps Portal that enables customers to schedule appointments directly based on technician availability.

## KEY RESULTS

**By transforming Field Service, UHS has been able to:**

- More quickly and effectively service their national partner and its customers
- Increase delivery of completed work orders by 20%
- Automate assignment of complex work orders based on technician skill level, specialization, and availability
- Exceed goal of 60% reduction in manual scheduling – achieving over 90% reduction
- Decrease overhead costs - optimize routes - decrease drive time - increase utilization
- Enable customers to self-schedule appointments, provide signatures and complete transactions digitally



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