CalendarAnything streamlines Simmtronic's appointment schedules for greater visibility

SIMMTRONIC
L I G H T I N G   C O N T R O L S

For over 30 years, Simmtronic has focused on developing and manufacturing state-of-the-art lighting control systems; the company is one of the UK's largest suppliers to prestigious developments in London and thousands of projects across the country. CalendarAnything is one of the key tools that they have chosen to support their ongoing digital transformation — here's how it is being used to turbo-charge productivity.

Improving appointment organization to prevent business inefficiencies

The company's five engineering teams are made up of about 30 field engineers; the managers of these teams needed a flexible calendar solution to create the Service Appointment records necessary to track the data the business relies on to keep things streamlined and flowing seamlessly. An engineer's schedule consists of several appointments in any given day for programming, service, and maintenance, making the capability to organize all the appointments of the utmost importance in this case.

Simmtronic implemented Salesforce throughout the organization as an end-to-end service delivery tool, finding that the platform revolutionized multiple facets of the business. The only shortcoming was that the native Salesforce calendar on mobile did not allow team managers to see their team's appointments, which was critical as the team managers and engineers are constantly on the go and had previously relied on a mobile Outlook solution.

Finding a mobile-ready calendar app for teams on the go

Given the usefulness of the data that Salesforce would be able to provide the business, the solution needed to be Salesforce-based. The Simmtronic engineering team used the Salesforce calendar mobile app for about a year before their frustrations led to asking the organization to find a solution that would better meet their needs. Jess Costanzo, Commercial Director, oversees the Salesforce implementation at Simmtronic and found CalendarAnything when she began looking around the Salesforce AppExchange.

"CalendarAnything immediately jumped out because I saw that the mobile application would allow flexibility to see multiple team members. I particularly liked the day grouping view because that seemed similar to how the team used Outlook, but with some improvements and, of course, leveraging Salesforce's ability to capture and present data." said Costanzo.

Delivering the right features and functionalities with CalendarAnything

Costanzo met with Silverline for a CalendarAnything demo to see how some of the Simmtronic use cases aligned with CalendarAnything. Silverline's developers worked with Costanzo on testing to ensure that CalendarAnything met the organization's criteria. Costanzo had this to say about the trial experience:

"The account executive that initially demoed the project and worked through some solutions with me was exceptional," said Costanzo. "He was very knowledgeable about the CalendarAnything product, and it was a great benefit that he was certified as a Salesforce Admin as well. He was able to assist in enabling us to get the most from the trial, including working through some flows with me to make sure the product could work as we wanted it to. That really made a difference in my decision to pitch that we proceed with Silverline's product."

One feature the engineering teams liked about the Salesforce calendar was the date picker that allowed them to quickly jump to another date. Simmtronic shared this feedback with CalendarAnything, and Silverline created and deployed a CalendarAnything date picker for Simmtronic as well as their existing customer base.

"The CalendarAnything customer service approach is very good. They were incredibly interactive with feedback, and their willingness to explore solutions that are outside of just their core offering was a refreshing change from some other software providers I've worked with in the past," said Costanzo.

Some of the CalendarAnything features and functionalities that are popular with Simmtronic's engineering teams include:

- ○ **Configurability:** Simple for each user to clone the master service appointment calendar for themselves
- ○ **Swimlane view:** Easy to visualize service appointments over a couple of months and group by user or field
- ○ **Agenda view:** On a mobile phone, the ability to quickly scroll to see who on the team is on which job for a quick high-level view
- ○ **Conditional coloring:** Ability to assign each team member or team a color for ease of visibility
- ○ **Filter panel:** In Gantt view, filtering by team and project is useful for sending a summary to a customer
- ○ **Drag and drop:** Saving time by simply moving around team members and appointments, a feature that is not available for the Salesforce calendar

## A second use case emerges to inform office space decisions

Silverline and Simmtronic uncovered a secondary CalendarAnything use case during the evaluation process. The Simmtronic staff uses CalendarAnything for hot desk booking in the company's London office. They use the Swimlane view to quickly see which desk is available for a specific date and time slot, and conditional coloring identifies each reservation by the department.

Office space in London is expensive, so logically the business wanted to keep track of utilization. The CalendarAnything space-booking data is analyzed in Tableau, offering insights into which days of the week are the busiest, how often the hot desks are fully booked, and which teams are making the most use of the space. The management team then uses the insights to make educated business decisions about the office space based on the usage data, including lease renewal.

Transforming a company from a high level to the granular details

Working with Silverline, Simmtronic was able to save costs by purchasing Salesforce Field Service Lighting licenses only for users who needed them. By using CalendarAnything in conjunction with Field Service Lighting, users and non-users alike have visibility into the engineers' appointments. Now management can use CalendarAnything for a high-level visualization while service reps are heavy CalendarAnything mobile users.

"With CalendarAnything, our teams have better visibility across all the appointment details in the same way they would see it on their laptops, which is good in terms of synergy," said Costanzo. "The Silverline team understood our needs and requirements for Salesforce and CalendarAnything and we appreciate their helpfulness and technical knowledge."
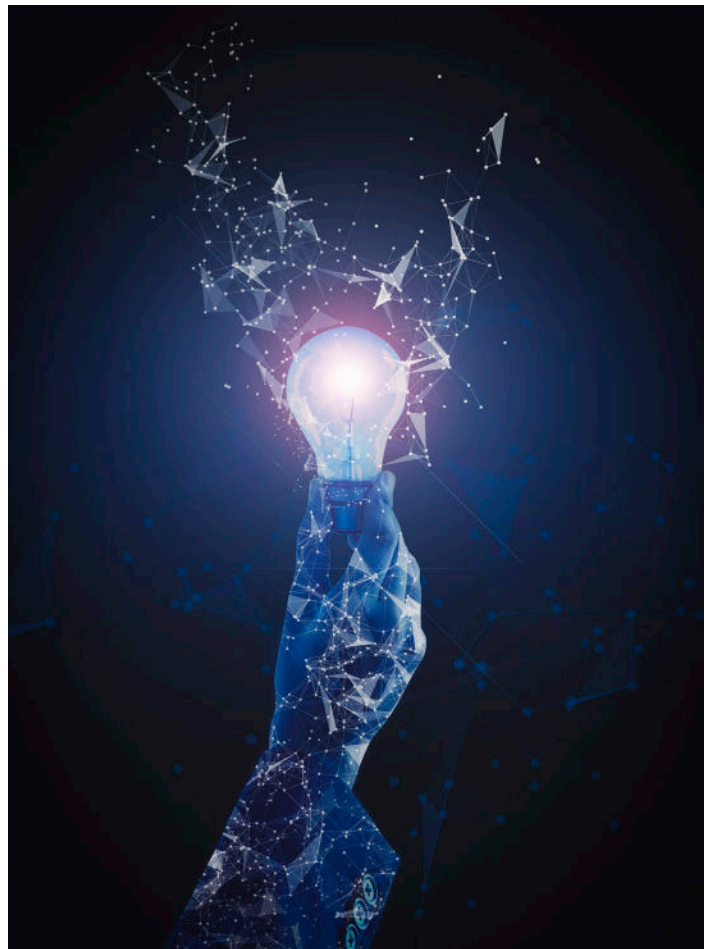
About Silverline

Since 2009, Silverline has helped clients deploy, manage, and enable continuous value with Salesforce's portfolio of products. Silverline also develops powerful solutions deployed on the Salesforce Platform, best practice industry accelerators, and robust third-party apps. CalendarAnything is the most customizable calendar app for Salesforce. It allows you to display any standard or custom Salesforce object on a calendar. Download the free trial today and find out why CalendarAnything is the highest rated calendar application on the AppExchange.

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