



How Weber partnered with Youreka to implement sophisticated smart forms, helping them collect actionable service data in the field.

CASE STUDY

Summary

INDUSTRY

Manufacturing

LOCATION

Breidenbach, Germany

SALESFORCE PRODUCT

Salesforce Field Service
Salesforce Sales Cloud

USE CASES

Emergency Repair
Technician Training
Job Hazard Analysis

COMPANY SIZE

1,200

CUSTOMER SINCE

01/2022

The Weber Team

Jake Pullen

DIRECTOR OF CUSTOMER EXPERIENCE

Kirill Kamayev

SALESFORCE PROGRAM MANAGER

The Opportunity

Weber has been manufacturing and servicing commercial food automation machinery for over 40 years.

As an established user of Salesforce Field Service, Weber needed advanced form functionality that would allow them to collect meaningful, actionable data in the field across their service teams.

Weber started examining Salesforce apps that could provide advanced form functionality enabling them to collect better data across all of their different types of service and installation appointments.



We're a very data-driven organization, but we were using open text fields in Salesforce to collect information in the field. There was no real reportable data out of that - you couldn't extract anything.

We needed to extract certain data points to help us build a narrative of what was happening in the field. This journey was the next evolution of our service discipline.



- Jake Pullen

DIRECTOR OF CUSTOMER EXPERIENCE

We started looking into some other solutions, but none of them were native to Salesforce.

They told us we needed to create a connector for each form, then maintain that connector, and update it manually whenever changes were needed.

We saw Youreka was native to Salesforce, and it was a no-brainer. From installation to implementation to maintenance - it just looked a lot easier.



- Jake Pullen

DIRECTOR OF CUSTOMER EXPERIENCE



The Solution

Youreka Smart Mobile & Offline Forms, Surveys & Checklists for Salesforce

Weber has successfully implemented Youreka Smart Mobile forms as a solution to enhance the efficiency and effectiveness of their technicians when providing support at various facilities. Leveraging the capabilities of Youreka in conjunction with Salesforce, Weber has streamlined their dispatch process and optimized data capture during on-site jobs.

When a dispatch notification is received through Salesforce, Weber associates a specific Youreka form with the corresponding job type. This tailored approach ensures that technicians have access to the necessary form to capture the required data while performing their tasks. By customizing the forms based on job types, Weber can gather precise and relevant information, improving the quality of data collected during each job.

Easy Implementation

Implementing Youreka is a simple and straightforward process that takes place entirely inside of Salesforce, and is accompanied by Youreka's training and enablement program.

Easy to Use

Youreka makes it easy to build sophisticated, customized forms for every type of job with a no-code approach. The Form Template Builder offers a user-friendly interface with drag-and-drop functionality, allowing for quick form creation. Custom styling and template/question cloning further enhance the speed and efficiency of building forms.

Weber retains complete control over their forms through Youreka's features such as version control, managed templates, archiving, and easy deployment. These capabilities empower the Weber team to make updates, track changes, and maintain a streamlined form management process. With Youreka, Weber can build and manage their forms seamlessly, ensuring a smooth and efficient workflow.

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I loved that I could single-handedly implement Youreka myself. The other solutions required a developer, maybe some infrastructure work, but Youreka just worked out of the box. No issues.



– Kirill Kamayev
SALESFORCE PROGRAM MANAGER

I love how easy it is. I can modify the form and publish it within minutes. The first time I built a form, it was exactly what I expected. You want it simple, you want it straightforward, and that's what I experienced with Youreka

I have people on my team – users without really deep technical knowledge – and they're now building their own forms. I don't even need to touch them any more.



– Kirill Kamayev
SALESFORCE PROGRAM MANAGER

Unparalleled Customer Support

Youreka offers a dedicated support team and robust documentation to assist with anything Weber needs.

I have to speak about your Customer Support, because we all know how important that is. When I submit a case, I expect a timely response – and that has absolutely been my experience with Youreka. When I reached out to Youreka, I got the help I needed immediately.



– Kirill Kamayev
SALESFORCE PROGRAM MANAGER



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The Outcome

For Weber, Youreka has become a trusted partner who has helped them elevate their utilization of Salesforce to the next level.

Initially launching with a single form as a pilot, they have since implemented seven unique forms across a variety of service and

installation processes to help them understand important KPIs and achieve their performance goals.

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We needed to get to a point where we could start reporting again, getting data so we could start measuring our KPIs. Youreka has allowed us to get standardized information that we can actually report on.



– Jake Pullen
DIRECTOR OF CUSTOMER EXPERIENCE

If I can summarize – easy to implement, easy to use, and great customer support. That’s what I get with Youreka.



– Jake Pullen
DIRECTOR OF CUSTOMER EXPERIENCE

Learn more about Youreka features

Have more specific questions about Youreka? Reach out to us directly or dive into our Technical Features Guide.



<https://youreka.io/company/contact-us/>



<https://support.youreka.io/>

