

ServiceMax Powers Field Service Operations for Fast Growing Solar Provider



Company

Greenspring Energy provides a unique combination of solar energy systems and energy saving products and services. Greenspring Energy has identified the best manufacturers and top quality products in key energy saving categories for home or businesses and backs up these products with professional sales, installation and service.

Challenges

Greenspring was manually tracking warranties and service contracts and using daily white-board sessions to develop technician's schedules. However, as a fast growing solar provider, the company needed a more efficient way to support daily scheduling, parts tracking and overall business growth. Further as many of the first warranties the company issued were about to expire they wanted assurance that the service team serviced products under warranty, and up-sold customers that were not covered under a contract.

Solution

As a recent adopter of the Salesforce.com platform, Greenspring sought a solution that would fully integrate their sales and field service experience, from initial customer contact, through to on-site equipment installation and service interactions. The company chose ServiceMax after looking at available options, as the pre-integrated CRM and field service capabilities of Salesforce.com and ServiceMax uniquely meet their needs.

Greenspring's also saw that ServiceMax enabled them to easily schedule and dispatch their five installation and three technical teams. Further the product's inventory capabilities enable Greenspring to capture, monitor and automatically update location-based inventory data, for all types of parts transactions including parts requests, stock adjustment or stock transfer. Finally, as a solar provider, Greenspring needed a solution that would help them execute preventative maintenance agreements, as their products have a long lifespan.

Results

After working with ServiceMax for just a few months, Greenspring realized numerous benefits. "Scheduling and parts management are already saving us a ton of time!" says Marie Stratton, project coordinator at Greenspring Energy. "I am excited to have Greenspring grow into the full capabilities of the platform."

For the first time, the Greenspring team can now easily track where their parts and installed products are physically located. Down the road, this will contribute to minimizing product loss. This is especially valuable as the company's parts inventory is growing so fast that they are planning to hire a dedicated person focused exclusively on inventory management.

Further, moving from white-board scheduling to the advanced scheduling capabilities of ServiceMax is saving the company significant time. The dispatch console has a rich interactive and highly configurable user interface that provides users with the ability to ensure they are efficiently sending the right tech to the right job at the right time. Marie has also enjoyed working with the ServiceMax support team. "I am continually impressed with the quick and consistent communication from the support team in addition to their ability to find the right solutions for our company."

Looking forward, the Greenspring Energy team is excited to grow into full capabilities of ServiceMax: next up is taking full advantage of SLA agreements tracking and alerts.

- Significant time savings each day by replacing manual scheduling and calendaring with ServiceMax
- Minimize inventory leakage and improve parts logistics efficiency with accurate tracking of parts in the field
- Created new revenue stream by automating and launching ServiceMax enabled yearly maintenance agreement renewals
- Eliminate warranty leakage - Warranty tracking of components enables part-level entitlement verification before a technician travels to a customer site.
- Improved visibility – Entire organization can access scheduling calendar
- Collection and centralization of customer and product data enables analysis on profitability of contracts.

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Project Coordinator,
Greenspring Energy



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