

# ServiceMax Engage

Enhance customer experience with self service and asset insights

## Service Outcomes

- Enhance Customer Experience
- Increase Recurring Revenue
- Improve Asset Data Quality and Visibility
- Reduce Call Volume & Number of Work Orders
- Strengthen Omnichannel Strategy

## End Customer Benefits

- Control of their own Service Interactions
- Fast and Easy Remote Support
- Mobile Access to Real-Time Asset and Service Information

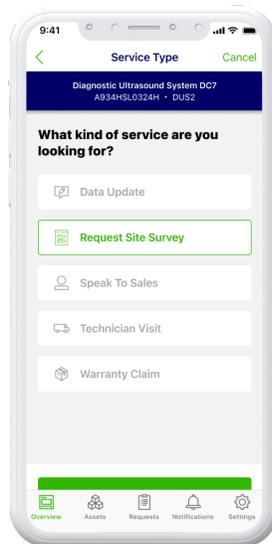
**“ServiceMax Engage is much more than a service request app - it puts the power to manage assets directly in the hands of our customers. With ServiceMax Engage, we are closing a critical part of our feedback loop and improving both the customer experience and the quality of our asset data.”**

Mark Hessinger  
SVP Global Customer Success,  
3D Systems

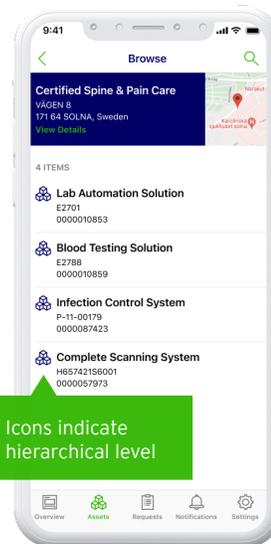
Owners and operators of complex assets expect greater visibility into and involvement with the service process. Service organizations, meanwhile, face growing challenges in maintaining accurate data on these assets, complicating their ability to execute service contracts and identify aftermarket opportunities. Web-based customer portals and communities, while enabling more connection, have on their own been inadequate for addressing these problems. What’s needed to fill the gap in a mobile-first world is an app that is user-friendly, fast and easy to deploy and preconfigured with the asset-centric visibility your customers need.

## Empowering Asset Owners and Operators

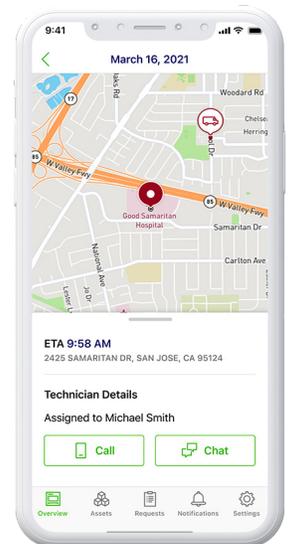
ServiceMax Engage is a turnkey mobile app that connects service organizations with their customers -the asset owners and operators- to increase service visibility, elevate the end customer experience and improve asset data quality. More than a service request or tracking app, Engage empowers end customers with self-service capabilities and gives them the same access to real-time asset and service data that field technicians and front-office staff have. This improved control and visibility can boost retention rates and loyalty, reduce the workload for frontline workers, and lead to higher customer lifetime value.



Customer Requests



Asset Hierarchy



Technician on the Way

# FEATURES AND CAPABILITIES

## USER EXPERIENCE

### White Labelling

Using their logos, fonts, and colors, businesses can make Engage fully their own and drive brand recognition by their customers. A individually branded mobile experience of Engage can be made available for the Apple App Store and Google Play Store.

### Seamless Integration

Available for iOS and Android smartphones, Engage is native to both ServiceMax and Salesforce, ensuring performance and security. Engage works seamlessly with ServiceMax Core, Service Board, ServiceMax Go, ServiceMax Zinc, and Asset 360 for Salesforce. It can also be easily integrated with third party apps to unlock new mobile experiences.

### Easy Administration

A refined UI allows admins to set up, test configurations and manage Engage quickly. It also provides full control over the configurable features. E.g., deciding which reports to expose to the end users.

### Knowledge Sharing

Engage users can choose which automatic notifications they want to receive by opting-in and opting-out. They can also subscribe to Product Broadcasts\* channels to follow announcements about favored topics.

## CUSTOMER REQUESTS

### Self Service

As needed, service organizations can create and display a list of requests for the end customers to initiate on their own. Engage users can schedule technician visits, open cases, file complaints, update asset data, and more.

### Enriching User Requests

To cater to unique requirements, Engage allows service organizations to ask additional questions before users can submit a request.

### Location-Based Requests

Engage users can view all their assets by location, and attach multiple assets to one request, all in one go - which is a real time saver.

\*requires Zinc licenses

### Remote Expert Support

Engage allows users to receive expert support by connecting through the embedded Zinc Hotline\*. Guided support includes audio, video, and annotation. For efficient troubleshooting, conversations are connected to the affected assets.

### Multichannel Support

Optional chat features\* can be turned on to keep end customers more involved and provide service organizations with greater oversight of conversations between technicians and the users on the customer side.

## ASSETS

### Asset Data Visibility

Service organizations can enable end customers to view and interact with in-depth asset data including performance metrics, bill of material, service history, and product manuals.

### Feedback and Data Accuracy

Engage can also be utilized to gather feedback about the equipment and ask for asset data updates, e.g., when an asset location has changed, or assets from a company acquisition need to be added.

## APPOINTMENTS

### Service Process Transparency

Instead of picking up the phone to ask when certain assets were last serviced or have preventive maintenance scheduled, end customers can view all past and upcoming appointments on Engage. They can also submit requests and add appointments to their device's calendar and see, at a glance, all assets with service due.

### Technician En Route

To let end customers know when exactly the field technician will arrive, Engage shows the technician's location in real time on a map while continuously updating the estimated time of arrival.

### Collect Feedback

Every time a service visit is complete, service organizations can prompt the end customer through a mini pop-up survey, to rate the technician's work. Analyzing this feedback data helps service organizations make performance and resource decisions.

Learn More

[www.servicemax.com/products/engage](http://www.servicemax.com/products/engage)