



Mobile Field Service App Pumps Up Efficiencies & Customer Satisfaction with Backend Integration Solution

Business as usual for Westmor meant service teams were bogged down with paperwork and sales had limited customer visibility. They needed to bring all the teams in their organization together in order to be successful and profitable as a company. As Westmor continued to grow, they knew their paper processes would not scale to support revenue growth.

The pivotal moment came when:

- Internal teams working in silos slowed productivity
- Manual systems led to missed revenue opportunities due to insufficient customer information
- Lack of data made strategic investment decisions difficult

Applying technology led to the following:

- Technicians and call center agents reacting to customers in real time
- Technicians, dispatchers, parts management, sales, and billing having a single place to view field service data
- Much faster call-to-dispatch rates, so technicians can spend more time on revenue generating activities

The road to success is delivering:

- A 20% increase in technician utilization
- Ten hours a week saved through operational productivity
- Increased first time fix rates
- Increased customer satisfaction
- A 20-30% increase in work orders processed



Customer Quick Facts

INDUSTRY: Manufacturing & Services
SIZE: 350 employees/40 Service Technicians
HEADQUARTERS: Morris, MN
WEBSITE: www.westmor-ind.com

Solutions

- ServiceMax Field Service Management Platform including Scheduling, Inventory Management, and Reporting
- ServiceMax Mobile for iPad
- MaxCare Standard Support
- Magic xpi Integration Platform

Challenge

Prior to using ServiceMax, Westmor was working in silos. They needed a tool to bring all of their groups in the organization together to better serve their customers. It was taking them weeks to get work orders and paperwork back to the office for billing. Westmor was worried about losing customers' trust if clients received invoices for work that wasn't performed, or contained work descriptions inaccurately transcribed by the billing team.

Call center agents were using pen and paper to capture incoming calls, and would fax or read information over the phone to a technician. This process meant relevant information could easily get missed as it was passed along to service technicians.

Westmor also lacked the data needed to make informed business decisions. They had difficulty conducting timely market analysis that would inform decisions, such as technician territory assignments and training requirements, that best addressed customers' needs. Since profitability was a key objective, they needed insights on technician utilization and how much billable time a technician was performing each week.

Westmor needed a solution to integrate and automate processes, including work orders, sales orders, parts inventory, and billing between Salesforce and their Oracle JD Edwards EnterpriseOne ERP system. They had to eliminate the manual data entry needed to keep both systems up to date. They quickly realized that building an effective mobile field service application was going to be a challenge and, in order to make it effective, it must have an attractive front end and connect processes across their core backend systems, including CRM, ERP, and related systems.

Solution

Westmor turned to ServiceMax to deliver a field service management solution and worked with Magic to integrate and automate processes between systems. Today, Westmor technicians use ServiceMax on their iPads and connect in real time into their ERP, EnterpriseOne, for billing and parts management. Now, when a problem is logged in Salesforce, a work order is automatically sent to a technician using ServiceMax, and the work order is simultaneously generated in EnterpriseOne. When technicians complete time cards or order replacement parts, both systems are automatically updated. The system is also used to monitor labor costs, which enables them to track productivity. Since many of their customers are in remote areas of the Midwest with limited Wi-Fi or cellular availability, technicians needed a solution that worked offline.

ServiceMax's offline capabilities support zero connectivity. Technicians connect and download all the information they need for their scheduled work, enabling them to work offline for days. Once the tech reaches a spot with reception, their data syncs and is immediately updated. Westmor has their ServiceMax system setup so that every 30 minutes it syncs their data, which they report, works well.

“What ServiceMax has brought to Westmor is monumental. We went from walking papers back and forth from department to department to getting real-time information in all departments. ServiceMax has enabled Westmor to operate on the next level. In our industry, service really drives sales. Which is why we invested in service, because the better our service department is, the better our sales and customer satisfaction will be.”

Mark Kragenbring, Field Service Operations Manager, Westmor

Results

ServiceMax together, with Magic's integration platform, have helped increase Westmor's customer satisfaction. Thanks to all teams—technicians, dispatchers, parts management, sales, and billing—they now have access to job status and work updates in real time. Westmor is able to communicate a unified message effectively and efficiently with the customer. Mark Kragenbring, Westmor's Field Service Operations Manager, stated, "ServiceMax has enabled Westmor to bring a high level of professionalism to their service technicians."

Not only have they eliminated manual processes and increased customer transparency, but they also have access to internal data they have never had before. They can see how valuable each technician is to their bottom line with a fully integrated service process and can easily track how much work is being done thanks to the ServiceMax's offline iPad app. With ERP integration via Magic xpi, all information is entered accurately into work orders directly, and Westmor has increased their tech utilization by 20%. With more time to spend, technicians now process up to 30% more work orders and collect on them fast—improving time to invoice from nine days to one.

With these results Westmor was ready to scale. According to Kragenbring, "We have grown our service technician team by 25% in the last six months and have the goal of tripling the team in the next five years. As Westmor continues to grow our geographic regions, the use of ServiceMax and Magic xpi make our processes scalable, and technicians and call center agents can react to customers in real time."



About ServiceMax

ServiceMax, from GE Digital, leads the global industry of field service management software—an estimated \$25 billion market worldwide. The company creates solutions for the 20 million people globally who install, maintain, and repair machines across dozens of industries as the leading provider of complete end-to-end mobile and cloud-based technology for the sector.

About GE Digital

GE Digital is the leading software company for the Industrial Internet, reimagining industry's infrastructure by connecting software, apps and analytics to industrial businesses to drive a Predix-powered world. GE Digital creates software to design, build, operate and manage the entire asset lifecycle—enabling industrial businesses to operate faster, smarter and more efficiently. For more information, visit www.ge.com/digital.

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