

# ServiceMax for High Tech

Drive asset visibility and process efficiency in the depot and in the field

## Highlights

- Achieve complete asset visibility
- Streamline any business process within Salesforce
- Manage service execution in the depot and in the field
- Built natively on Salesforce, no integration required
- Analyze service operations and improve strategic planning with real-time service analytics
- Developed on standard objects to take advantage of latest emerging technologies such as AI, Einstein, IoT
- Enterprise-grade security, compliance and governance from the world's #1 CRM

## Benefits

- Prevent warranty & contract leakage at scale
- Maximize contract attach and renewal rates
- Improve visibility into RMA and depot progress
- Improve sales and service interaction
- Improve operational efficiency
- Increase asset uptime
- Improve customer satisfaction

Against the backdrop of the pandemic and the relentless march of digitization, high tech companies have to find out how to operate in a safe and compliant manner while prioritizing performance of their assets and service quality. To achieve these goals, their service delivery needs to become more efficient, prescriptive, and profitable.

ServiceMax and Salesforce joined forces to deliver an unparalleled solution that drives operational efficiency and uptime with a 360-degree view of assets on the world's #1 CRM platform.

Built on standard Salesforce data objects and leveraging its inherent platform capabilities, ServiceMax adds deep asset-centric functionality and automation to the Salesforce platform - wrapped in a modern application layer where ServiceMax's industry expertise shines through. ServiceMax delivers complete visibility into assets in the field so companies can maximize asset performance. This supports high tech companies' move to outcome-based business strategies that propel their business forward in an age where service is a leading differentiator.

## ServiceMax enables you to:

- Boost your service profitability
- Gain full visibility into your installed base and be smarter with asset data
- Increase the agility of your service organization
- Minimize Time to Value
- Take advantage of significant innovations in every release



**SERVICEMAX**

- 📄 Asset & Change Order Management
- ⚠️ Reverse Logistics & Depot Services
- 📄 Warranties, Contracts & Entitlements
- ⚙️ Automation & Process Templates



# KEY CAPABILITIES

## Boost Service Profitability

### Entitlement Engine

Provides service teams with automated, rules-driven entitlement verification, upon creation of cases, work orders, and return orders. Helps prevent providing unwarranted free labor, parts, and loaners and ensures customer quotes include accurate service levels, pricing, and discounts.

### Contract and Warranty Automation

Includes interactive features allowing service teams to select the best coverage option. Service thresholds alert service teams how much of the entitled services the customer has already consumed.

### Contract Negotiated Pricing

Enables service teams to define and track granular pricing terms for individual assets, contracts, and services on top of the selected Pricebook. This ensures they apply the correct pricing terms to work orders and cases, thereby avoiding leakage and improving the billing process

### Service Contract Plans

Provides a templated approach for creating individual service agreements more efficiently and accurately. Save multiple Service Contract Plans and combine them at the line item level.

### Product Service Campaigns

Allows you to handle recalls, change orders, product modifications and upgrades, and run campaigns into your installed base with maximum efficiency. Quickly identify affected assets, and automatically generate work orders, return orders, opportunities, and more.

### Out-Of-The-Box Reports

Equip you with instant insights on assets with warranties expiring, contract renewal insights, work orders completed within warranty period, contract attach rate, warranty conversion to service contract, and work orders covered/not covered by entitlement.

### Service Contract APIs

Automate the creation of service contracts from a CPQ quote. Ensure that the services offered, coverage and pricing terms, and SLAs from the sales contract is accurately reflected in the service contract.

### Service Analytics\*

Get actionable insights from service profitability and cost-to-serve analytics. Tracks cost breakdown across assets and compare actual margins against expected in real time.

## Smarter with Asset Data

### Returns/RMA Management

Handles a multitude of return scenarios and facilitates reverse logistics processes by automating and prescribing steps. Call center agents, technicians, and depot engineers can also track the affected assets at any given moment.

### Depot Repair

Streamlines all related processes and comes with many packaged flows, such as advanced exchange, loaner management and different options for return-to-repair scenarios. All built-in flows can easily be configured to accommodate unique requirements. ServiceMax's Depot Finder simplifies customer returns by automatically identifying the best repair center through a rules-based approach.

### Maintenance Plan Template

Eliminates the need to create individual plans for preventive maintenance from scratch. Using templates to automate the plan creation means it takes a lot less effort to create plans and accuracy is built in. This can be applied to both time-based and condition-based maintenance plans in Salesforce.

### Asset Hierarchy

Is a way for service organizations to organize assets in multi-level hierarchical views and benefit from complete installed base visibility. It enables service teams to view, search, track, update and manage equipment in real time.

### Asset Timeline

Delivers an at-a-glance, holistic view of past and future activities on an asset on an interactive visualization. It's available out of the box and requires no further configuration.

### Asset Service Coverage

Access entitlement information on the browser, in the field technician app, and in the customer portal. Helps customer-facing team have more productive customer conversations, enables the on-site field technician to select the correct entitlement for work orders, and empowers customers to access coverage details via self-service.

### Asset Technical Attributes\*

Consume data from IoT platforms, telemetry devices and sensor-based equipment in support of companies offering condition-based and time-based maintenance plans.

## Increase Service Agility

### Service Process Manager

Allows you to manage workflows for all types of work including field service and depot repair. Service Process Manager (SPM) is a no-code configuration tool for building and supporting any service process. Without relying on IT, it helps business administrators to easily create and modify workflows, regardless of their complexity. SPM is not limited to asset-centric use cases. Whether there is a multi-step workflow required to open a case, assign a preferred technician to a work order, or account for timesheet entries, SPM assists in automating that process. Available within the Salesforce Flow framework, SPM is complementary to and enhances existing Salesforce Flows.

### Best-Practice Flow Templates

Decrease implementation time by 30%.<sup>1</sup> Our templates leverage 30 years of combined CRM and field service expertise to deliver workflows for installed base management, stock management, returns, depot repair, work order management, mobile technician enablement, and more. For a rapid time to value, ServiceMax comes with more than 60 packaged best-practice process flow templates and transactions that are complimentary to Salesforce Flows.

### Service Process Wizard

Assembles various workflow steps to drive the guided execution of business processes. The actions shown in the wizard are based on the context of where the user is in the Field Service process. The wizard can be also used both in the Customer and Partner Community.

## Transactions

Allow admins to quickly build and extend service processes with standalone transactions. Transactions include configurable screens, object mappings, expressions and can be added to an existing Salesforce Flow to modify the process.

## MuleSoft Connect

Accelerates the integration into your existing IT landscape with templates for common data flows.

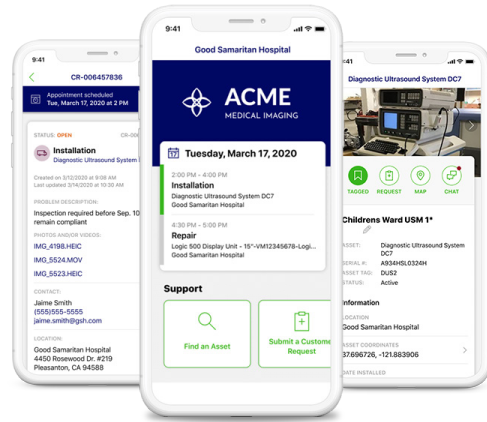
## Mobile App Extensions

### ServiceMax Engage

Empower your customers and meet their needs for more self service while improving asset data quality.

### Zinc Intelligent Remote Service

Enable your service teams to securely leverage organizational expertise for faster troubleshooting and instant help.



*ServiceMax Engage, the turnkey mobile app that connects your customers with your service teams*

## About ServiceMax

ServiceMax's mission is to help customers keep the world running with asset-centric field service management software. As the recognized leader in this space, ServiceMax's mobile apps and cloud-based software provides a complete view of assets to field service teams. By optimizing field service operations, industries with high value, complex, mission-critical equipment can support faster growth and run more profitable, outcome-centric businesses.

For more information, visit [www.servicemax.com](http://www.servicemax.com).

<sup>1</sup> Based on average ServiceMax customer results.

\* Powered by Tableau CRM

Get your personalized demo today at  
[servicemax.com/demo](http://servicemax.com/demo)