SERVICEMAX

PROFESSIONAL SERVICES

TODAY'S
ENVIRONMENT

In today's world people are increasingly dependent on technology and it takes excellent field service to keep the world running. Three challenge pillars that ServiceMax helps customers address are growing talent constraints, increased dependency on technology, and rising customer expectations.

In 2022, over 50% of field service providers will offer a specialized digital customer experience that enables two-way interaction and workflow initiation via multiple human and nonhuman channels.

In 2022, more than 60% of asset manufacturers will offer outcome-based service contracts, up from less than 15% in 2018.

In 2022, only 30% of field service providers will be ready to deploy AI-based decision support in their field service management platforms in order to compete better, despite robust capabilities being available by then.

WE KEEP THE WORLD RUNNING

ServiceMax field and asset service management software enables our customers to keep the world running, relying upon both prepared service technicians and complete access to equipment data to eliminate unplanned downtime. ServiceMax delivers an industry-leading solution that was designed for and tested by hundreds of thousands of technicians, engineers, dispatchers, and service leaders.

1
WORK ORDER PER SECOND

200M
ASSETS UNDER MANAGEMENT

350K
TECHNICIANS

We have data coming from ServiceMax that we've never had before. Through that data and analytics on top of it, we are able to accurately plan our long term resource forecast and drive a resource planning schedule through highs and lows.

TREY KEISLER
CIO, Global Operations, GE Power

PROFESSIONAL
SERVICES

We help our customers transform their service execution through a rapid modular deployment approach that we perfected by working with hundreds of enterprises around the globe.

ServiceMax's Professional Services offers a broad range of customizable services, project management capabilities, and advanced toolsets that support a customer on their journey to plan, implement, adopt, maintain or grow their ServiceMax solution. Professional Services connects the dots between your business processes, your desired outcomes and the ServiceMax product functionality to provide an optimized service execution management business.

When implementing enterprise-scale solutions, it is imperative to have the support of a proven team of experts that know the solution inside and out and are vested in your success. Professional Services has deep domain expertise and is an industry leader in service execution with over 450 global customers.

Each implementation has a jumpstart as we leverage our large toolset of purpose built extensions and pre-defined modules based on real-life customer use cases. We recognize that innovation is key to our customers, so we continue to invest in these toolsets with a focus on maximizing the quality and efficiency of our implementations.

I was really impressed with how ServiceMax handled the implementation process.
They laid everything out that we needed to complete the project. After 2 months, we were up and running.

DENISE CARPENTIER
Special Projects Manager, Nautilus Company

ENSURING THE
RIGHT OUTCOMES

Professional Services enables quick time to value through iterative releases. By leveraging pre-defined modules based on successful implementations we minimize total cost of ownership.

ACCELERATE ROI

We enable quick time to value through iterative releases while minimizing total cost of ownership by leveraging pre-defined modules based on successful implementations.

SEAMLESSLY INTEGRATE

Professional Services delivers quick integration with existing enterprise data sources and ensures each customer's critical use cases are prioritized to maximize overall benefits.

MITIGATE PROJECT RISKS

Our vast industry expertise combined with our modular implementation mitigate project risks. We validate early, deliver immediate outcomes, and ensure long term success.

WHAT SUCCESS MEANS
TO OUR CUSTOMERS

19%
INCREASE
IN PRODUCTIVITY
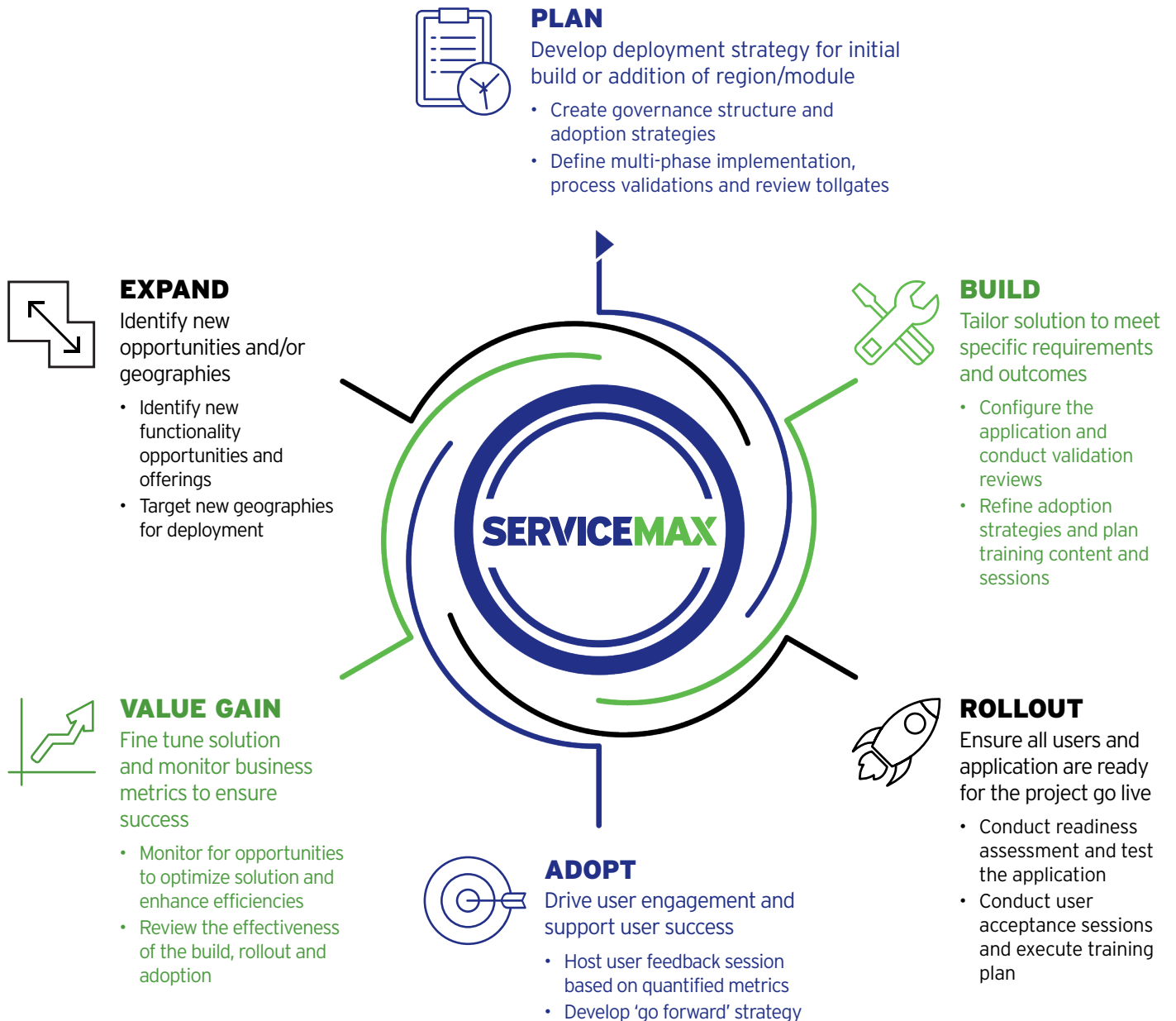
67%
ADOPTION
IN 6 MONTHS

15%
INCREASE
IN ORG. CAPACITY

Source: ServiceMax Annual Customer Survey

CUSTOMER JOURNEY

ServiceMax Professional Services works with you to understand your business goals, quickly design a solution, roll out foundational modules, promote adoption and ensure the complete implementation is successful, repeatable and scalable. We are here for the full lifecycle of ServiceMax.

PLAN
Develop deployment strategy for initial build or addition of region/module
- Create governance structure and adoption strategies
- Define multi-phase implementation, process validations and review tollgates

BUILD
Tailor solution to meet specific requirements and outcomes
- Configure the application and conduct validation reviews
- Refine adoption strategies and plan training content and sessions

EXPAND
Identify new opportunities and/or geographies
- Identify new functionality opportunities and offerings
- Target new geographies for deployment

ROLLOUT
Ensure all users and application are ready for the project go live
- Conduct readiness assessment and test the application
- Conduct user acceptance sessions and execute training plan

VALUE GAIN
Fine tune solution and monitor business metrics to ensure success
- Monitor for opportunities to optimize solution and enhance efficiencies
- Review the effectiveness of the build, rollout and adoption

ADOPT
Drive user engagement and support user success
- Host user feedback session based on quantified metrics
- Develop 'go forward' strategy

SERVICEMAX

THE **MAXAPPROACH**

We understand the complexities of implementing a field and asset service management solution. Utilizing the consultative strengths and field service domain knowledge within the Professional Services team, the MaxApproach acts as the vehicle for execution of your vision. Our mission is to guide you to success and get live fast. We work with you to understand your objectives with a focus on measurable outcomes in order to expedite time to value. We then quickly design a repeatable and scalable solution configured to your requirements using service execution best practices. Foundational modules are rolled out in a focused, agile-based implementation. Then our team prioritizes user acceptance and education, and drives adoption to ensure implementation success.

PLAN
The first interaction between the Client and ServiceMax Professional Services sets the tone for the success of the project. During this stage, the ServiceMax team introduces the methodology, communication and education plans, and governance for the project and beyond. Key activities include the onsite discovery session, solution and release planning and the business requirements signoff. Outcomes from the Plan stage are to ensure alignment of requirements and a clear understanding of the business, metrics, and desired improvements.

BUILD
Solution and release planning is critical to ensuring the ServiceMax team can begin configuration specific to the Client's requirements. Using the release point framework and sprint cycles, the ServiceMax team can show quick value of the solution as it's built. The Client has the opportunity to begin testing and prepare for User Acceptance Testing in the next stage. This stage is completed with feature acceptance signoff and validation of the end user training materials.

ROLLOUT
Any successful roll out relies on thorough Client conducted User Acceptance Testing, Systems Integration Testing, if required, and achieving end user training. These milestones lead to key activities such as finalizing the cutover plan, migration to the Production environment, and both technical and business go-lives. Introductions to Client Support and Client Success ensure that the Client has the right contacts within ServiceMax for ongoing support.

ADOPT
ServiceMax is committed to the ongoing success and adoption of the application for our Clients. As such, this stage conducts a project retrospective, review of the change management plan, and ensures that the Client understands how to continue to measure success within the tool. The Customer Success team closes out the stage with a review of ongoing engagement opportunities.
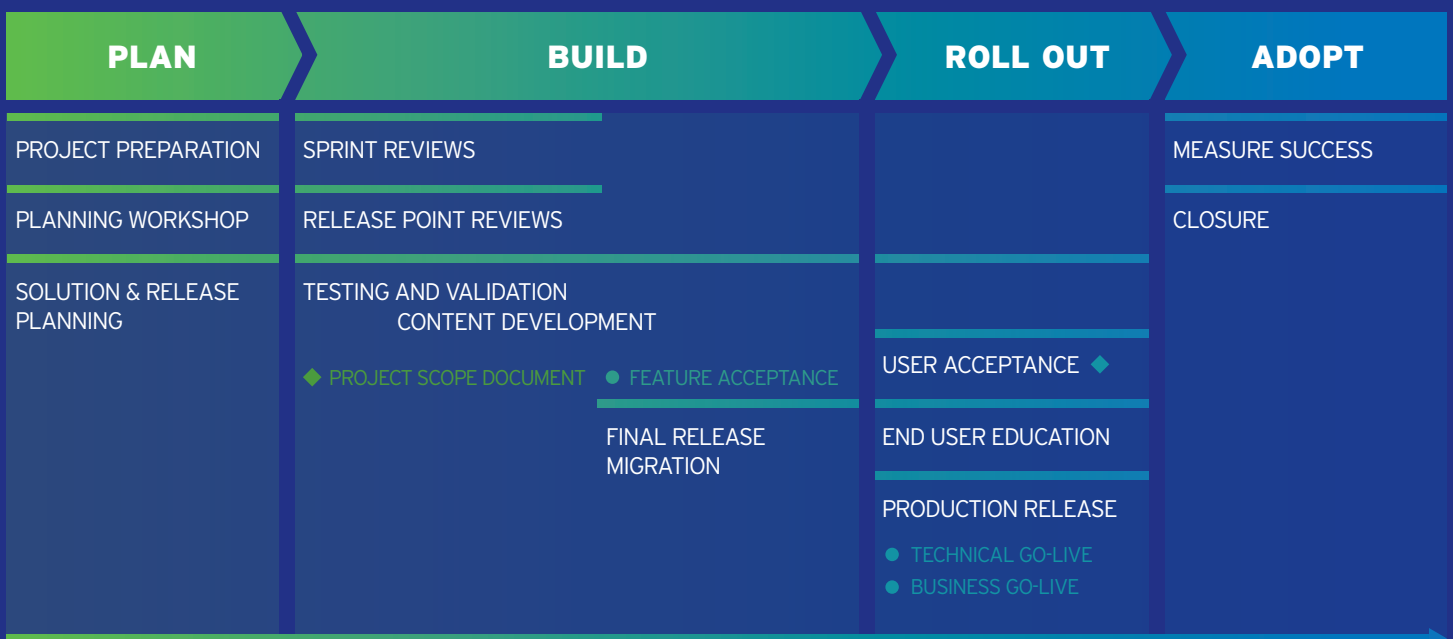
VALUE GAIN & EXPAND
To ensure the application's value continues to grow, Professional Services monitors for opportunities to optimize the solution and enhance efficiencies while reviewing the effectiveness of the build, rollout and adoption. We support expansion of the application identifying new functionality opportunities and offerings and helping to target new geographies for deployment.

THE MAXAPPROACH **ROADMAP**
Each phase of the Max Approach roadmap has clear deliverables and customer tollgates ensuring a successful implementation.

| PLAN	BUILD	ROLL OUT	ADOPT
PROJECT PREPARATION	SPRINT REVIEWS		MEASURE SUCCESS
PLANNING WORKSHOP	RELEASE POINT REVIEWS		CLOSURE
SOLUTION & RELEASE PLANNING	TESTING AND VALIDATION CONTENT DEVELOPMENT		
	◆ PROJECT SCOPE DOCUMENT ● FEATURE ACCEPTANCE	USER ACCEPTANCE ◆	
	FINAL RELEASE MIGRATION	END USER EDUCATION	
		PRODUCTION RELEASE	
		● TECHNICAL GO-LIVE	
		● BUSINESS GO-LIVE	

PROJECT MANAGEMENT AND GOVERNANCE

MODULAR IMPLEMENTATION

Take on less risk and get faster time to value with your service execution management deployment.

Large enterprise-scale software deployment doesn't have to take months or years. While service execution processes can be quite complex, the key to success is a clear deployment journey and fast wins. This is why ServiceMax Professional Services utilizes a modular implementation that delivers results fast, one successful and proven module at a time. We guide customers on where to start the journey and which module to implement next, while providing them with flexibility to prioritize modules based on their specific business needs.

Based on hundreds of successful deployments, ServiceMax recommends that all customers begin their service execution journey with Installed Base Management. Installed Base Management is the system of record for all serviced equipment and is the cornerstone of everything we do. If you would also like to improve team collaboration and troubleshooting, then the Real-Time Communication module should be implemented first before Installed Base Management.

ServiceMax provides a variety of modules to deliver on your company's objectives around service execution after the implementation of our foundational modules. These modules include Work Order Management, Real-time Communication, Entitlements, Proactive Maintenance, Parts Management, and Complex Jobs. The deployment of individual modules can be as quick as 6-7 weeks. Each module comes with a specific scope, to ensure fast delivery, that can be expanded to customer requirements.

REAL-TIME COMMUNICATION · WORK ORDER MANAGEMENT · PROACTIVE MAINTENANCE · COMPLEX JOBS

INSTALLED BASE MANAGEMENT · ENTITLEMENTS · PARTS MANAGEMENT
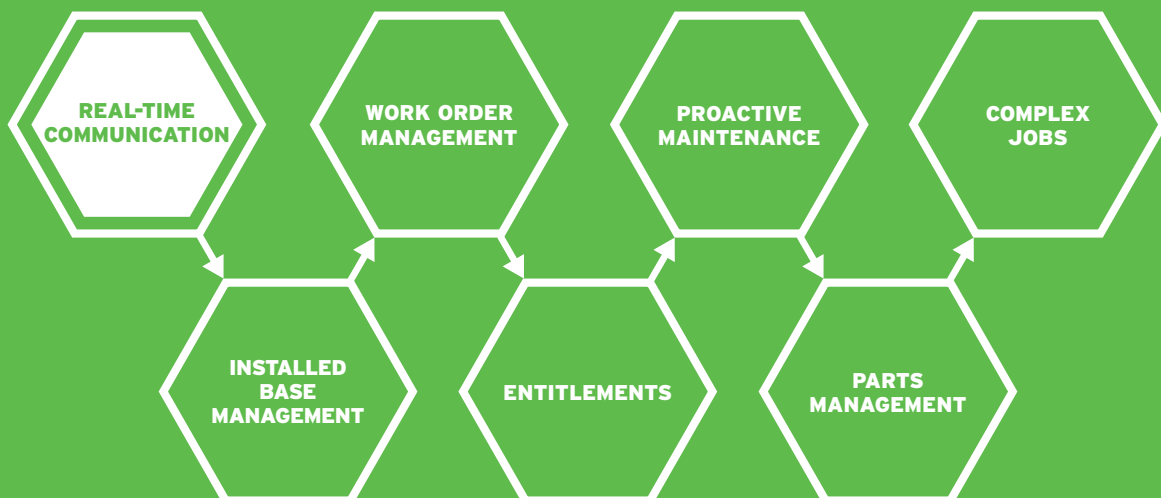
FSM MODULAR JOURNEY

The ServiceMax Field Service Management (FSM) solution helps original equipment manufacturers and service providers execute the entire service delivery process. We help customers deliver differentiated services that drive new sources of revenue, improve efficiency, and boost customer loyalty.

	REAL-TIME COMMUNICATION	INSTALLED BASE MANAGEMENT	WORK ORDER MANAGEMENT
BUSINESS OUTCOME	• Speed time to answer for questions that come up on site • Streamline communication between FSE and operational support teams • Improved information dissemination and sharing for a more informed and engaged workforce • Measure communication to identify and resolve process bottle necks	• Improved IB management • Great competitive data collection • Cross sell / up sell opportunities captured • Mobile data capture • Improved communication	• Ability to view tech availability & skills to match manually or automatically through assignment rules • Ability to plan, assign and execute field service activities for install, break-fix, preventive maintenance & depot repair work • Digitization of WO debrief capturing labor, parts, expense & travel • Generation of service report
SOLUTION COMPONENTS	• Zinc Real-Time Communication App • Hotlines • Contextual Conversations • Broadcasts • Conversation Analytics	• Mobile App • Installed Base Management • Collaboration via Zinc or Chatter • Troubleshooting via online product manuals	• Mobile App • Service Board • Work Order Debrief • Proforma Invoice Generation
RESULTS	• Increase in first-time fix rate • Reduction in overtime • Increase in technician productivity and engagement	• Increase in contract renewal rate • Increase in technician utilization • Increase in service revenue	• Increase in technician productivity and utilization • Reduction in DSO • Increase in service revenue

ENTITLEMENTS	PROACTIVE MAINTENANCE	PARTS MANAGEMENT	SCHEDULE OPTIMIZATION
• Ability to manage entitlements against warranty & service contracts • Ability to track service contract execution including WO pricing based on contract terms • Track SLA and SLA performance • Provide accurate service quotes for authorization prior to work being performed	• Ability to automatically generate PM WOs based on predefined schedules • Specify parts required • Define task/steps required to be completed	• Provides visibility and management of inventory levels at customer locations including van stock and warehouse • Ability to request and transfer parts from mobile • Returns management (RMA)	• Automated optimized scheduling & dispatching for FSE based on heuristics • Provide customer with appointment time or window • Balance drive time across resources
• Mobile App • Warranty and Service Contracts • Service Level Agreements • Service Quotes and approval processes	• Proactive Maintenance • Condition-based plans • Usage-based plans • Time-based plans	• Mobile App • Location Management • Work Order Debrief • Inventory Processes • Reverse Logistics	• Service Board • Ranked Appointment Booking • Schedule Optimization
• Increase in contract renewal rate • Increase in service revenue • Increase in employee satisfaction	• Increase in equipment uptime • Increase in technician productivity • Decrease in compliance incidents	• Decrease in mean time to repair • Increase in first-time fix rate • Increase in NPS	• Increase in technician productivity & utilization • Decrease in service cost • Increase in first-time fix rate

ASM MODULAR JOURNEY

ServiceMax Asset Service Management(ASM) solution optimizes the execution of operations and maintenance for companies operating their own assets in their own facilities by enabling service teams to increase productivity and asset uptime while reducing safety and compliance incidents. ServiceMax helps execute jobs of any complexity with best in class service execution software.

	REAL-TIME COMMUNICATION	INSTALLED BASE MANAGEMENT	WORK ORDER MANAGEMENT
BUSINESS OUTCOME	• Speed time to answer for questions that come up on site • Streamline communication between FSE and operational support teams • Improved information dissemination and sharing for a more informed and engaged workforce • Measure communication to identify and resolve process bottle necks	• Improved IB management • Great competitive data collection • Cross sell / up sell opportunities captured • Mobile data capture • Improved communication	• Ability to view tech availability & skills to match manually or automatically through assignment rules • Ability to plan, assign and execute field service activities for install, break-fix, preventive maintenance & depot repair work • Digitization of WO debrief capturing labor, parts, expense & travel • Generation of service report
SOLUTION COMPONENTS	• Zinc Real-Time Communication App • Hotlines • Contextual Conversations • Broadcasts • Conversation Analytics	• Mobile App • Installed Base Management • Collaboration via Zinc or Chatter • Troubleshooting via online product manuals	• Mobile App • Service Board • Work Order Debrief • Proforma Invoice Generation
RESULTS	• Reduction in time to service • Reduction in repeat visits • Increase in employee engagement	• Increase in contract renewal rate • Increase in technician utilization • Increase in service revenue	• Increase in technician productivity and utilization • Reduction in DSO • Increase in service revenue

COMPLEX JOBS	PROACTIVE MAINTENANCE	PARTS MANAGEMENT	SCHEDULE OPTIMIZATION
• Ability to manage groups of people & equipment/tools required to carry out work • Ability to assign resources when needed across multiple jobs	• Ability to automatically generate PM WOs based on predefined schedules • Specify parts required • Define task/steps required to be completed	• Provides visibility and management of inventory levels at customer locations including van stock and warehouse • Ability to request and transfer parts from mobile • Returns management (RMA)	• Automated optimized scheduling & dispatching for FSE based on heuristics • Provide customer with appointment time or window • Balance drive time across resources
• Mobile App • Service Board • Crew Management • Shift Planning	• Proactive Maintenance • Condition-based plans • Usage-based plans • Time-based plans	• Mobile App • Location Management • Work Order Debrief • Inventory Processes • Reverse Logistics	• Service Board • Ranked Appointment Booking • Schedule Optimization
• Increase in technician productivity • Decrease in service cost • Increase in equipment uptime	• Increase in equipment uptime • Increase in technician productivity • Decrease in compliance incidents	• Decrease in mean time to repair • Increase in first-time fix rate • Increase in NPS	• Increase in technician productivity & utilization • Decrease in service cost • Increase in first-time fix rate

WORLDWIDE REACH

Professional Services leverages deep subject matter expertise across broad range of industries to ensure successful implementations. We have extensive and proven experience with over 450 customers worldwide. Our project scalability skillset and flexible delivery models enable us to deliver fast time to value for organizations from small regional business to large global enterprises.

Each Professional Services team member, from our project managers and architects through to our configuration experts and developers, are certified ServiceMax experts across all ServiceMax industries including life sciences & medical, industrial manufacturing, building & construction, oil & gas, power & utilities, aviation, transportation & mining and, high tech & telecom. It is through this expertise that clients both large and small have been able to expand and deploy ServiceMax throughout many regions of the world.

100%
CLOUD-BASED

450+
CUSTOMERS IN 40 COUNTRIES

SALESFORCE-NATIVE

CUSTOMER CASE STUDY
MILLIPORESIGMA

CREATING A FASTER, MORE STREAMLINED EXPERIENCE

A leader in Life Science providing scientists and engineers with best-in-class lab materials, technologies and services.

- Industry: Pharmaceuticals
- Size: 50,000 employees
- ServiceMax users: 1,000
- Headquarters: Billerica, Massachusetts

CUSTOMER CHALLENGE

MilliporeSigma needed a 10,000-foot view of their service operation, but had disconnected databases throughout the organization. "It could literally take a month to conduct the analysis we needed." says Stephen McPhee, head of service.

SERVICEMAX SOLUTION

ServiceMax dramatically reduced data analysis time enabling opportunities to generate revenue. "Whereas before it could take us a month to pull together data and analyze, now it's in real time. We can make sure we're accurately forecasting results and managing workload appropriately, with instant data." says Stephanie Jackson, Area Service Manager.

PROFESSIONAL SERVICES IMPLEMENTATION

ServiceMax Professional Services collaborated with MilliporeSigma to successfully deploy the core features of ServiceMax. We followed an approach that started small within a single region and expanding in workflows, integrations, and regions based on their business needs. MilliporeSigma's business required integration with Oracle and multiple SAP instances. The solution went live in the US, then evolved with roll outs worldwide under the direction of a global steering committee, greatly standardizing processes and reporting.

Professional Services worked with MilliporeSigma to define and enable real-time access to service KPIs and also identified inventory was being lost due to truck stock visibility, implemented measures to address. Professional Services defined a network of excellence for end-users that supported in driving adoption. This combined with our collaborative support enabled MilliporeSigma to continue rollout with future features.

CUSTOMER CASE STUDY
SCHNEIDER ELECTRIC

BUSINESS TRANSFORMATION ON A GLOBAL SCALE

Global specialist in energy management and automation and develops connected technologies and solutions to manage energy and process in ways that are safe, reliable, efficient and sustainable.

- Industry: Power
- Size: 180,000 employees
- ServiceMax users : 8000 in 80 countries
- Headquarters: Rueil-Malmaison, France

CUSTOMER CHALLENGE

Schneider Electric had recently merged more than 27 brands. They needed to provide excellent service, and a unified customer experience, to a complex customer base, with hundreds of products and millions of assets globally.

SERVICEMAX SOLUTION

ServiceMax integrated multiple SAP systems and an Oracle ERP. As a result, over 8 million assets were qualified to be monetized. Schneider Electric now manages the installed base, service contracts, and work orders to grow its service business. The customer uses mobile to provide technicians with the right product information in the field and enables them as 'lead' generators for the business.

PROFESSIONAL SERVICES IMPLEMENTATION

ServiceMax Professional Services developed a standardized global template based on best practices to account for regional requirements across 80 countries. In addition, key field service functions were engaged in defining processes and testing. The initial rollout included a ServiceMax mobile application with offline capabilities and featured Signature Capture. Subsequent releases featured bi-directional integration, and data mapping from multiple systems and sources.

CUSTOMER CASE STUDY
MCKINLEY EQUIPMENT CORPORATION

BECOMING A PROACTIVE SERVICE PARTNER

A distributor and service provider of material handling products, commercial doors, warehouse equipment, and accessibility products.

- Industry: Building & Construction
- Size: 200 employees
- Users: 158 ServiceMax users
- Headquarters: Irvine, California

CUSTOMER CHALLENGE

McKinley Equipment needed to evolve from paper-based work orders in order to improve customer experience. But it struggled with drastically limited customer information. In addition they wanted to detect failing parts and schedule maintenance before customers even knew there was a problem.

SERVICEMAX SOLUTION

ServiceMax enabled cloud-based and mobile field service software, and helped provide visibility into McKinley's installed base with alerts to potential equipment failures. "We are changing the conversation with customers. For organizations, we are talking about data and how we give them insights into their operation. And for homeowners, our insights allow us to deliver a previously unreachable level of safety and service. The conversation is not about price. It is now about extending the life of assets and maximizing up-time," explains CFO Kevin Rusin.

PROFESSIONAL SERVICES IMPLEMENTATION

Professional Services provided best practice knowledge on processes and implementation support. The implementation featured an iPad application and ERP integration (MAS). Professional Services assisted with high level design and mapping, and managed vendor warranties. McKinley gained efficiency by implementing site-specific preventive maintenance plans that allowed multiple assets on one work order.

Professional Services provided support in the development of training and knowledge transfer to key McKinley resources, implemented a lead generation program that incentivized technicians, and used a strategy of gamification to drive adoption.

SERVICEMAX

For more information about ServiceMax Solutions visit **www.servicemax.com**

SMX-0002-(E)
English
210618