



RMB Solutions Service Management

A single, integrated solution for streamlining service organizations, accurate analysis, and greater service profitability



Reduce Warranty Expenses
by having a real-time view of warranty status



Achieve Substantial Inventory Savings
in the first year



Enable Service Contract Profitability
through visibility of service delivery costs



Reduce Order-to-Cash Cycle
from weeks to minutes

“ Warranty, quality control, planning, engineering, sales, internal and external service technicians, the parts and service departments – all of them are using Service Management. ”

Ted Martin

Warranty/Service Manager, Landoll Corporation

Executive Summary

RMB Solutions' Service Management offers an efficient, integrated alternative to custom or standalone systems in service departments. Service Management is closely integrated with the manufacturing system, to streamline processes and increase service profitability and customer satisfaction.

Frontline workers have a single interface to consult and work from. Customer service representatives (CSRs), field service technicians and others consult up-to-date information for accurate inventory, price, and warranty data. They can also perform tasks with automatic updates to the ERP system, all from a single location, securely and with greater accuracy.

Reports and dashboards let you analyze warranty expense, service contract profitability, field service performance, and after-the-sale product quality measurements. You can make your service center more profitable by tracking these key performance indicators, all while enhancing your brand.

Introduction

Service organizations are no longer just about satisfying customers and containing costs. They have become potential profit centers, and are being recognized as critical components of a company's overall brand.

Leading companies around the world have recognized this. Research from Aberdeen Group shows that best-in-class service organizations see average customer profit margins that are 8.5% higher than industry laggards, and 11% higher customer retention levelsⁱ. As margins from service continue to rise, sometimes outpacing those of products, executives can no longer dismiss service as a non-strategic aspect of the operation.

New technologies have made best-in-class service organizations more efficient and more profitable. Companies that are slow to adopt more integrated systems are not just falling behind — they're falling *way* behind. Clunky custom systems, spreadsheets, and scripted responses are increasing customer effort levels — and losing customer loyalty. Customers are four times more likely to leave a service interaction disloyal than loyal, according to the *Harvard Business Review*.ⁱⁱ

ⁱ Omer Minkara and Tom Paquin, "State of Service 2017: Lead with Customer Experience, and Efficiency Will Follow." Aberdeen Group, February 2017.

ⁱⁱ Matthew Dixon, Lara Ponomareff, and Anastasia Milgramm, "Stop Trying to Delight Your Customers: The Idea in Practice." *Harvard Business Review*, July - August 2010.

The hidden costs of manual processes

When data must be entered twice, errors mount. And when CSRs must spend time looking for information, your labor costs increase, and customer satisfaction levels decrease.

On average, employees spend 15% of their time seeking information they need to do their jobs.ⁱ

What's more, while huge amounts of data often accumulate on products, returns, defects, and service, little of it can provide much insight if it resides in disconnected and non-standard forms scattered around the organization that make it near impossible to assemble and analyze (Fig. 1).

Manufacturers that cannot accurately assess or forecast their warranty expense or service contract profitability could well be selling service contracts that are *losing* money, and not know it.

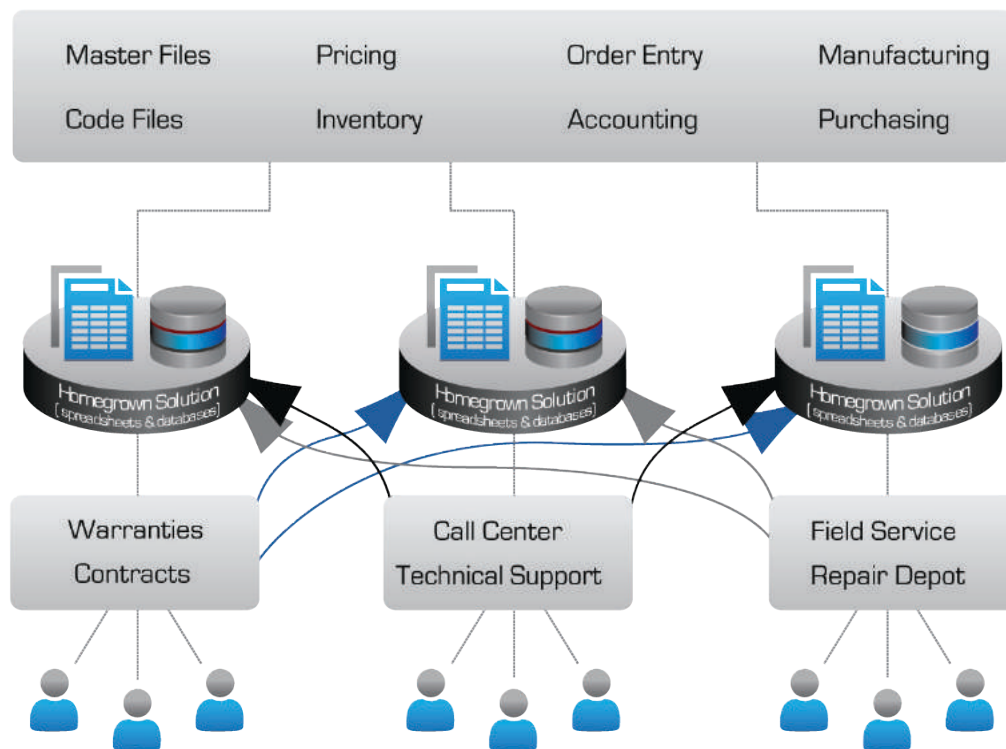


Figure 1: Service departments relying on disconnected islands of information cannot function quickly or efficiently, nor understand profitability

One integrated system for many processes

RMB Solutions' Service Management offers an efficient, integrated alternative to these labor-intensive and expensive methods. It is tightly integrated with ERP systems to ensure smooth data flow, eliminating the need for inefficient and error-prone duplicate data entry.

ⁱ Omer Minkara and Tom Paquin, "State of Service 2017: Lead with Customer Experience, and Efficiency Will Follow." Aberdeen Group, February 2017.

Thanks to this integration, you can replace the multitude of spreadsheets, point solutions, and work-arounds with a single, powerful system.

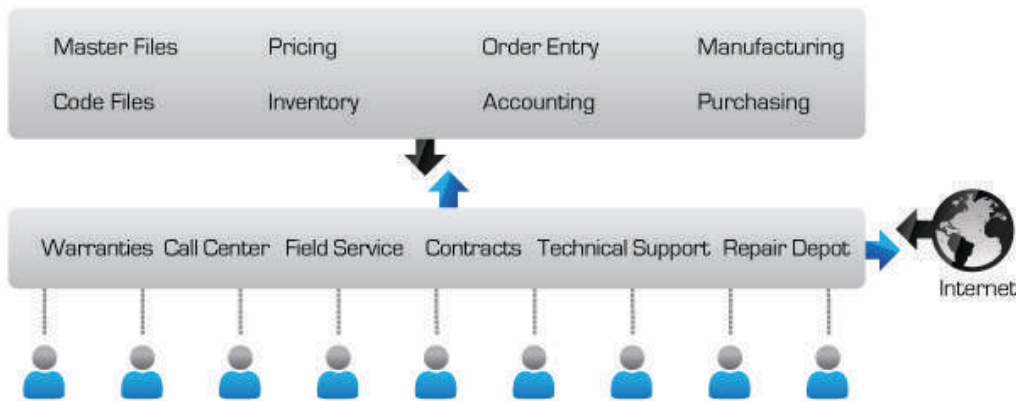


Figure 2: RMB Solutions Service Management dramatically reduces the time it takes to manage service transactions, and makes analysis of key metrics such as warranty expense possible.

All service delivery personnel have a single, personalized interface to work from, no matter their position or location. Technical support reps, field service technicians, and administrators get up-to-date information on customers, products, and inventory. They can also view, create, and update every task necessary in the service and repair process.

Reporting and dashboard capabilities let you track and analyze key performance indicators in your service depot, so you can identify your greatest costs as well as your best revenue opportunities.

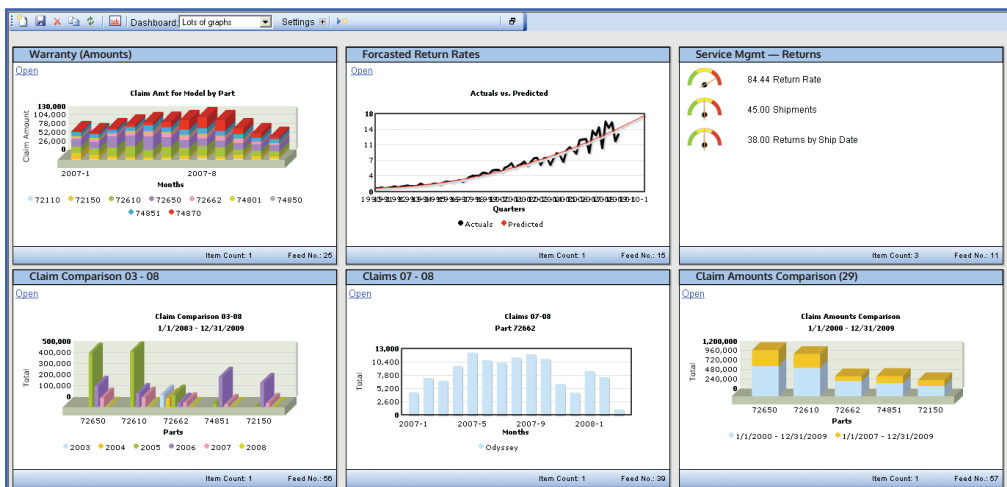


Figure 3: Fully customizable dashboards provide a quick snapshot of different aspects of your organization, at a detailed or overview level.

Improve customer satisfaction

When CSRs or technical support receive a customer call, they can:

- Look up whether a product is still under warranty
- View details of the service contract
- View the customer history, including prior purchases and service calls
- Update warranty information while the customer is on the phone
- Register the product (if bought through a separate channel)
- Consult the knowledge base on the spot for quick issue resolution

“It takes seconds from the time the phone rings to the time a technician has all the information they need in front of them — the warranty information, the service history, everything. From the time they pick up the phone to the time they hang up, they’re talking nonstop about the customer, their product, their needs, their situation.”

Rob Taylor
Director of Technical Services, Southbend

Permission levels control what users have access to. Alerts and notifications can be set to automatically pop up for different triggers, such as product names or issues. CSRs can also receive instructions to upsell eligible service contracts.

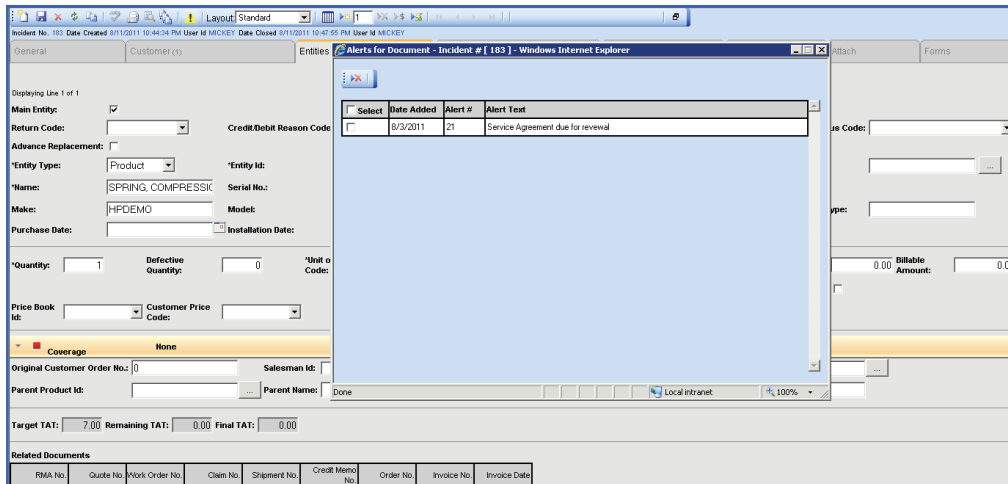


Figure 4: CSRs can immediately look up warranty information. Automatic alerts can be set to appear when you want them to.

Multi-channel capabilities

Service Management provides an optional online RMA Portal for your customers who prefer self-service. On the RMA Portal, customers can:

- Register a product
- Request an RMA
- Check on an RMA status

The RMA Portal walks the customer through the return process with specific instructions, to catch errors from the outset. The return request is fed directly to Service Management, where it is highlighted for approval and disposition.

The online portal has been shown to reduce call volumes in the service center, reduce labor requirements for CSRs, and increase customer satisfaction.

Streamline repairs

Service Management mimics the RMA workflow, and can be easily customized to match your company's operational requirements. It easily handles complex processes such as obtaining approvals, sending out loaners or replacements, or making claims from your own suppliers.

Service Management provides several powerful features for managing the return and repair process, including:

- **Receiving:** Service Management can receive a defective part or a vendor replacement without having to mix your assets with your customers'.
- **Work order templates:** Work order templates can be created and maintained in Service Management. Technicians import these templates directly into the work order, resulting in huge time savings, since they don't have to start from scratch every time they start a repair.
- **Import item process record:** Technicians can import an item process record directly from the ERP into a work order, to retrieve the list of parts and manufacturing operations required. Technicians simply remove the steps they don't need.
- **Manufacturing Orders:** Multiple options for using manufacturing orders integrated to Service Management scheduling and work order management.
- **Automatic data transfer:** All data documented during a call is automatically transferred to the work order, eliminating error-prone, time-consuming duplicate data entry.
- **Loaners:** Service Management provides the option to send refurbishment stock as a loaner while the repair is in process — and automatically updates appropriate inventory in the ERP. Automatic reminders help you keep track of loaners.
- **Vendor claims:** Technicians can research whether a part or product is under warranty with a supplier. The technician can create a PO from the same interface to file the vendor claim.

Single ticket for entire lifecycle of repair/RMA

Service Management provides a single ticket for every repair or RMA, so that everyone throughout the organization, from a CSR to a field service technician, can know the status of a repair/RMA at any time, from any location.

Optimize resources

Service Management optimizes both inventory and labor with several features, including:

- **Centralized/decentralized work scheduling:** Repair tasks can be sent to a centralized inbox, where technicians choose their own tasks to work on, or to the individual inboxes of technicians.
- **Filter capabilities:** Filter tasks by any number of categories, such as time left on task or type of task, so technicians can take tasks based on their specialty, by time left, by customer priority, or by any other category you wish.
- **Inventory visibility:** Technicians can immediately see where specific parts and resources are located, to maximize inventory and resources across your locations.

Increase profitability of field service teams

Analyst firm Aberdeen notes that field service on average can provide 10.7% higher margins than products.ⁱ But lack of optimization and poor visibility won't deliver those kinds of margins. For example, while more than half (54%) of all service visits require a spare part, too often technicians and management don't know where they can find the right inventory.ⁱⁱ

Service Management has a Field Service app that gives field service technicians access to key data and features. Technicians use the app on a phone or tablet, which can function even in areas without wireless connectivity. This, in combination with the Service Management features, optimizes technicians' time.

RMB Solutions' Service Management has been critical in achieving a 15.9% profit margin in the services operation, from break-even or loss in prior years.

Jorge Alavarez
Director of IT, Hussmann-Mexico

^{i.} Aly Pinder, Jr., "The CSO's Field Service Agenda." Aberdeen Group, July 2015.

^{ii.} Aly Pinder, Jr., "Field Service Workforce Management: Empower Tech 3.0" Aberdeen Group, May 2015.

Field Management features include:

- **Scheduling field service technicians:** Service Management acts as your virtual planning board (Fig. 5). Quickly match your resources to demand, with the ability to see and schedule everything you need, such as available labor resources by skill type, part availability in various locations, skill assignments, scheduled work orders, etc.
- **Coverage visibility:** Technicians can immediately see the terms and conditions of a customer's warranty and service contract.
- **Work order templates:** Service Management lets you create and maintain work order templates for technicians to import, modify, and re-use as needed.
- **Flexible quotes:** Technicians can easily revise quotes, with pre-programmed information on necessary approval steps. Service Management keeps a record of all quotes, and automatically updates invoicing.
- **Labor/parts tracking:** Service Management tracks all costs associated with a service order, including parts and labor for both billing and reporting purposes, with little or no extra effort on the part of the technician.

Multi-channel capabilities for dealers

Service Management can also provide a web portal for your dealer network. Suppliers can submit claims directly online, and the information is sent to Service Management for approval and processing.

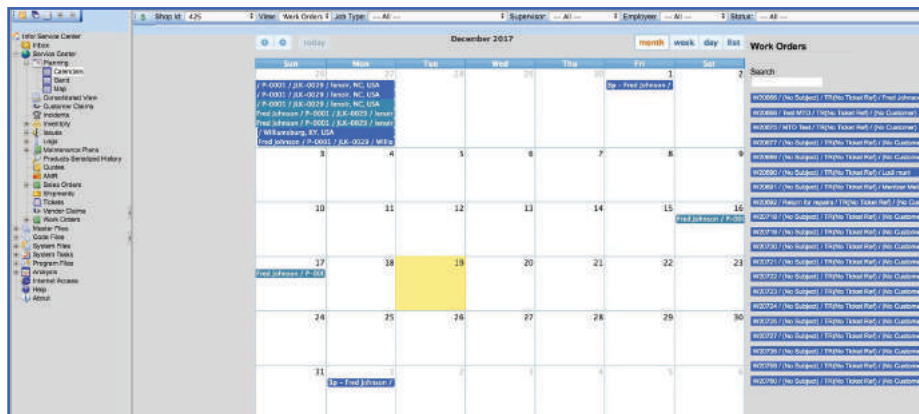


Figure 5: Service Management acts as a powerful planning board that lets you quickly match resources to demand, when, where, and how you need them.

Simplify project manufacturing

Service Management provides sophisticated capabilities for managing large, complex projects that require extensive scheduling, shipments, services, specialized labor, parts, and other requirements.

Project manufacturing capabilities help you ensure you get the right materials and the right labor to the customer site at the right time. Service Management also provides accurate tracking of all costs associated with the project, so you can manage billing and payments along the way.

Service Management shows the critical path — the relationships between various sub-projects — to keep sub-projects moving along in the right order. Sub-projects can be rolled up to higher levels for invoicing purposes, and technicians can view the entire project in a Gantt chart to see the hierarchy of projects and dependencies (Fig. 7).

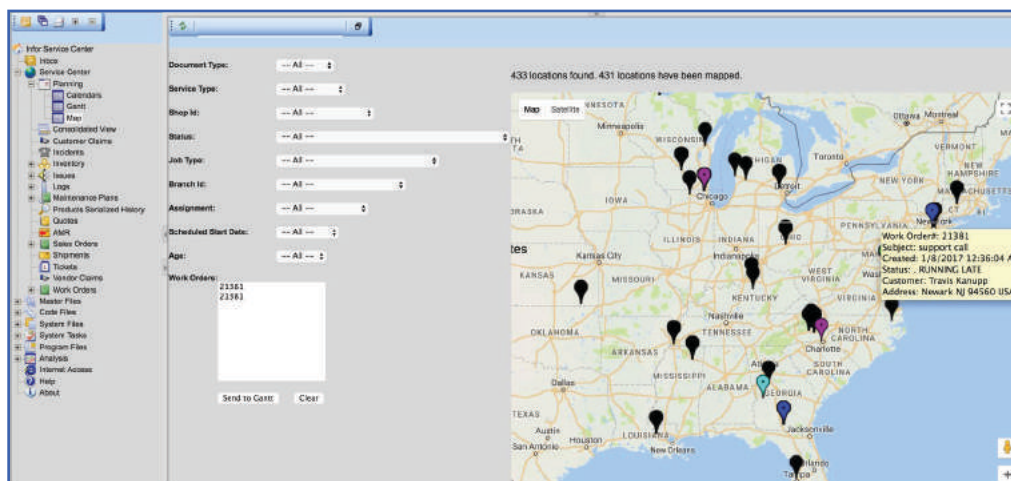


Figure 6: View service calls on a map to visually manage routes and assignments.

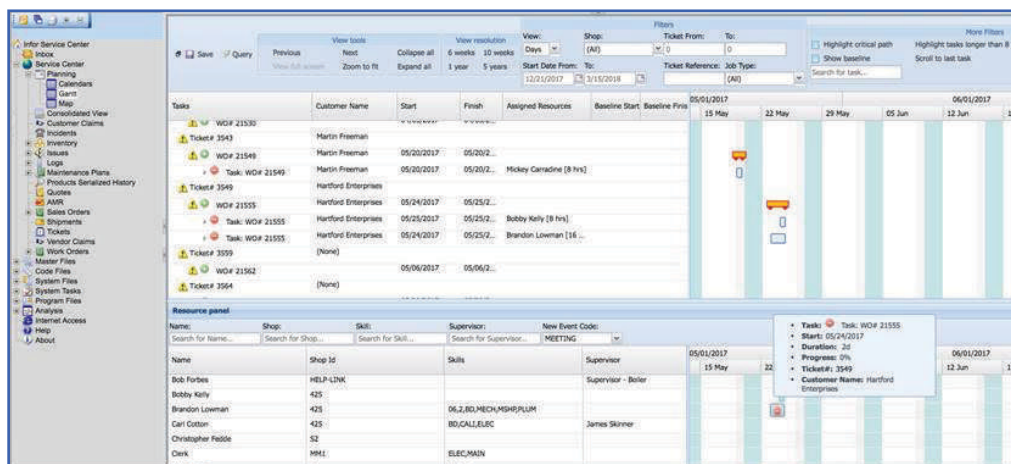


Figure 7: A Gantt chart shows the relationships between sub-projects for complex project manufacturing.

Key performance metrics

With Service Management, you no longer need to burden IT resources with ad hoc requests for reports that can take days or weeks to produce. All the data you want on your service department is tracked and available for viewing in different reports in your centralized system. Service Management includes hundreds of reports, graphs, and queries, so you can identify bottlenecks early, and spot revenue opportunities quickly. Some of the key reports include:

- Warranty expense
- Service contract profitability
- Field service performance
- Repair revenues
- Inventory churn (overall and by location)
- All costs associated with the repair of a customer's product
- Service revenue (repair, field, other)
- Service margin
- Failures within the first 30 days of installation
- On-time shipping performance
- On-time delivery performance
- Turn around time (TAT)
- Repair supplier scorecards

Rapid access to information for quality departments

Quality departments often struggle to get important information on products after the products have left the manufacturing facility. They want to better understand the customer experience and, if a product is failing, to know how quickly it is failing, why it is failing, and what part of the manufacturing process underlies the issue.

Service Management's centralized database streamlines access to this data and lets your quality department develop metrics to automatically measure and show after-the-sale product quality with reports such as:

- Return rates
- Failures
- Mean time to failures
- Reasons for failures

Summary of benefits of RMB Service Management

Powerful analytics

Accurate analytics so you can quickly identify:

- Warranty expense
- Service contract profitability (SLA)
- Repair revenues
- Bottlenecks in repair depot
- Inventory churn (overall and by location)
- All costs associated with the repair of a customer's product
- First time repair
- Time to failure
- Pareto analysis

- Order to cash
- Quotes won
- Any other desired ad hoc analytics

Faster processes

Automated data transfer for faster processes, reduced manual errors, and lower costs:

- Up-to-date warranty and service contract status information
- Standardized data capture, display, and transfer for faster, more accurate processing of RMAs, claims, returns, repairs (on-site and off-site), loaners, etc.
- Centralized knowledge base with fully documented information on product defects and repairs
- Option to process claims submitted over the web, instead of fax or written claim submissions
- No need to manually reconcile data between service department and ERP
- Time spent on processes that used to require manual research goes from hours to minutes

Enhanced customer service

- Single, unified ticket for every call and every customer, for more complete incident management from beginning to end
- Ability to issue return authorization number, notify customer by email, create customer orders for advance replacements, and create work orders for repair — all in just minutes
- Numerous customer-facing web page interaction points (warranty registration, RMA, claims, etc.)

“Service Management has helped us achieve a 96% first time fix rate.”

Rob Taylor
Director of Technical Services, Southbend

Optimized resources

- Flexible methods for assigning tasks to technical support and field service resources
- Schedule and plan field service technicians by geography, in-process work, dispatch capabilities, and others
- Dashboards help you immediately identify bottlenecks and other issues

Advanced technology

- Web-based solution installed on a web server — no software to install, maintain, or upgrade throughout your organization
- Customizable user interface and navigation lets you fit the system to your business processes
- A truly global solution with multiple language and location capabilities
- Top-quality documentation, technical support, and sales support

Service Management's proven financial benefits include:

- A dramatically shortened order-to-case cycle, with such features as client signature capture or payment acceptance by the field technician at time of service delivery
- Reduced inventory levels thanks to high visibility of on-hand inventory
- Higher productivity from team members, with the same or fewer team members handling higher volumes of service calls

"Service Management has enabled us to reduce warranty claims by 75%. The proactivity of our people out in the field and the ability to monitor and stay on top of things has driven our warranty claims down."

Ted Martin

Warranty/Service Manager, Landoll Corporation

Conclusion

Manufacturers today need to have powerful, integrated systems in their service depot if they wish to increase the profitability of their service centers. Those that continue to rely on custom or spreadsheet-based systems risk not just their profit potential but customer satisfaction and their overall brand.

RMB Solutions' Service Management is a single, unified system that eliminates the need for costly and cumbersome manual methods. The single system streamlines processes, provides a centralized knowledge base for better tracking and dissemination of product/service information, and makes analysis of your entire department possible, for higher profit margins and improved customer satisfaction.

For more information

To get a personalized demonstration of how Service Management can help you improve profitability in your service department, contact RMB Solutions at sales@rmbolutions.net or at 770-643-9284.

RMB Solutions

Our sole focus is the development and delivery of industry-leading Service Management solutions. For more information, visit www.rmbolutions.net.

