



Executive Brief

10 steps to improving aftermarket service

Increase revenue and the competitive advantage of your organization's service operation.



Highlights

Add revenue from aftermarket service and part sales.

Grow customer loyalty.

Meet high customer expectations.

Optimize sell and cross-sell opportunities.

Increase productivity.

Manage multiple locations, countries, languages, and currencies with a single solution.

Aftermarket service pains

Providing aftermarket service is never easy. Time is wasted when your field technicians arrive at a job location only to discover that the required parts aren't even on the truck or in inventory. You might not be able to determine just how much your more demanding customers are actually costing you. You might not be invoicing the right amounts and billing correctly for parts and labor. And if you rely on several different systems, you're likely constantly buried under piles of paperwork that isn't even completely accurate.

To solve these and related problems, you need a solution that's designed specifically to help service-centric organizations like yours streamline processes and maximize efficiency. Infor™ Service Management's end-to-end, integrated system is such a solution. By helping you focus on performance enhancements, you can make strategic improvements to your productivity, boost customer satisfaction, and increase overall profitability.

Here are ten proven tactics for improving your service performance and a look at how the advanced service-specific functionality of Infor Service Management can help you maximize opportunities:

1. Track KPIs

In today's fast-paced business environment, relying on surface-level reporting, casual observations, or inconsistent monitoring of key performance indicators (KPIs) can leave your company in the dust of analytic-savvy competitors. In order to set realistic, profit-focused priorities, you must be able to dig deep into the heart of issues and be confident that your data is reliable, current, and tied to relevant issues.

Easy to use and reliable, the detailed analytics reporting and KPI capabilities of Infor Service Management help your long-term strategic planning. They also help you set priorities, proactively maintain customer satisfaction, increase efficiencies, and take advantage of every profit opportunity.

2. Leverage sales opportunities

With the right customer relationship management (CRM) tools, you can leverage repeat sales, up-sell, and cross-sell opportunities. Easy access to service history

Important information for senior executives and managers in your organization who are responsible for making key business decisions in the following areas:

- Finance
- Operations
- Sales
- Service
- Supply chain management

allows you to identify frequent repair trends, aging parts, outdated models, and insufficient maintenance or warranty agreements. You can use this information to make suggestions for replacements and upgrades.

Provide all employees across your organization with a comprehensive view of each customer using the data collected by Infor Service Management. By utilizing historical records to present solid cases for customer ROI, anyone from a salesperson to a call center representative to a field technician can become an evangelist for new products and services.

3. Ensure technician availability

Technician availability can greatly impact service call resolution rates, cost of service, profit margin, and service level agreement (SLA) compliance. For many companies, technician skill level, certification, and specialized training must also be considered when scheduling maintenance or repairs for complex equipment.

With Infor Service Management, you'll be able to provide your scheduling/dispatch managers with the tools they need to efficiently track technician location and review service request details, such as parts availability, account status, and warranty agreement. You'll have visibility into appointment location and truck inventory levels, so you can dispatch qualified technicians optimally.

4. Extend service offerings

To increase revenue from existing customers, you need to be able to offer multiple service offerings—managing each revenue opportunity with efficiency, accuracy, and a focus on customer satisfaction.

As the cost of all service work performed under a service agreement can be directly tied to a contract, you can evaluate profitability in order to make adjustments to the portfolio of services offered. You'll be able to use sales information to monitor leads converted to opportunities and then converted to true sales with Infor Service Management. This allows you to measure the popularity of each offering, so you can optimally allocate your investment dollars to the right campaigns for the most-effective marketing strategy.

5. Clearly define service processes

Difficult to define processes, such as customer service, can easily erode into a chaotic free-for-all, where customer demands escalate into one crises situation after another. Redundancies between departments and gaps in communications can waste time and create additional work, as you attempt to find answers or sort out contradictions in data. Without clearly defined escalation policies, workflows, and best practices in place, you can face confusion over how to prioritize issues, allocate resources, and enforce policies.

Manage standard, routine tasks with Infor Service Management, so that you have more time to handle the remaining exceptions that require informed decision making. Access to data and job aids, such as workflow diagrams, escalation notifications, and process automations help you make cost-effective decisions and follow company-defined strategies for resolving issues.

6. Prevent unnecessary service dispatches

Several factors influence if and when a truck should be dispatched for a service request. Well-trained call center personnel can make the distinctions, as long as they have access to critical information, such as warranty agreements, service history, and account status.

With an advanced service lifecycle management solution, such as Infor Service Management, your service operation can perform at higher efficiency, maximize revenue, and be in a better position to take advantage of growth opportunities.

Increase customer communication and decrease resolution times with Infor Service Management. Eliminate many resource dispatches using call center scripts, knowledgebase queries, and reason resolution searches. Whether a customer logs an issue via your web portal, by email, or phone, you can track and monitor the issue closely to maintain SLAs and corporate KPIs.

7. Maintain parts availability

Stock outs, backorders, and inaccurate inventory levels are some of the most frequent reasons behind delays to field service resolution. Kinks in the inventory control system can cause obstacles to the service process, leading to extra trips to the customer site, long waits while parts are ordered, and costly downtime of equipment. When you lack visibility into parts usage, you run the risk of tying up cash in excessive stock of slow-moving parts, while failing to keep an adequate supply of critical components and replacement parts for key customers.

Maintain inventory accuracy and have easy access to detailed inventory counts with Infor Service Management. Manage a basic inventory of a few steady-moving parts, as well as multiple warehouses of thousands of components and kits with varying levels of usage based on hard-to-predict customer purchasing patterns.

8. Provide on-demand quotes

Service technicians are not sales people; but they sometimes need to be able to provide a quote or estimate to a customer, in order to complete the service call. No matter how complex the upgrade, repair, or installation, your field technicians should be able to provide customers with accurate estimates, and access current pricing information, inventory levels, and account status information while still on site. Without in-field quoting

abilities, your technicians may have to schedule extra service calls, delaying resolution and extending the customer's downtime.

With Infor Service Management, field technicians can access inventory, pricing, and account details—everything they need to create an estimate, work order, or equipment sale. The technician can also review the account details to determine if there is a purchase order policy, credit limitations, or outstanding past due invoices.

9. Make strategic purchasing decisions

Purchasing decisions can have a major impact on profitability. A strategic investment in parts inventory is necessary to maintain resolution rates and customer satisfaction. Determining the appropriate inventory levels and the most reliable vendors requires careful analysis of performance data.

Monitoring warranty claims, call backs, and resolutions can also help purchasing agents make decisions about which suppliers provide the most reliable components—which is important for product integrity and cost effectiveness, as well as customer satisfaction.

With Infor Service Management, you'll have the tools to maintain appropriate inventory levels, so that parts are available when needed, without excessive cost or restrictions on cash flow. With easy-to-use, ad-hoc report writing tools, purchasing agents can analyze usage trends

and reliability of vendors to assist with strategic purchasing decisions. Purchasing agents can anticipate parts requirements and prepare for fluctuations in demand with access to CRM, sales forecasting, scheduled maintenance, and service contract management data.

10. Equip field technicians with mobile devices

Access to data on the jobsite helps your technicians make preemptive decisions, efficiently use resources, and take advantage of up-sell and cross-sell opportunities. Additionally, remote data entry reduces paper dependency and data redundancy, improving real-time data accuracy and promoting a greener company with a smaller carbon footprint.

With Infor Service Management Mobile, your technicians can use mobile devices to access your central database. Field technicians can access warranty status, inventory levels, service contracts, service unit, and customer history, knowledgebase, unit configurations, and service request details.

Deliver exceptional service

With an advanced service lifecycle management solution, such as Infor Service Management, your service operation can perform at higher efficiency, maximize revenue, and be in a better position to take advantage of growth opportunities. Exceptional service becomes a competitive edge. Your service expertise becomes a vital resource to



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