Case Study: IT Equipment Services Provider

Start Date: 1st Feb 2021

End Date: In Progress

Background

The customer provide IT infrastructure management at large chains of stores like Chipotle, LOFT, Ann Taylor, Amazon and few major USA brands. They maintain POS, networking cables, CCTV cameras and other IT equipment and ensure that if there is an issue, it is resolve within agreed SLA timeline at the contract level.

They use in-house and contractor resources to schedule appointments at the store where the ticket has been raised for faulty device.

Whenever a ticket is raised, and customer decide to use a contractor resources, the ticket has to be sent to third party market place to find the contractor resource who has the skills matching with the ticket raised.

Once the work is completed, the finalized data should go to NetSuite ERP for invoicing and inventory adjustments.

Problem

The customer was facing following issues:

- No standard process to capture ticket from customer, emails were primary communication tool.
- Communications were happening over email and all the important data was with individuals or in their emails.
- Manually enter data into external third party marketplace whenever a ticket is raised where contractor resource is to be used
- Manually enter the finalized work in ERP to invoice customer and adjust the entry
- Manually scheduling the resources whenever a ticket is raised

All these issues were slowing down customer service, and it was leading to higher rate of SLA violation which was directly impacting revenue.

Solution

We transformed how customer handles tickets and scheduling using tools available in Salesforce and improved their ticket resolution time by huge difference.

We also automated few processes which do not require attention from customer service agents, and customers are auto-updated on certain events.

This basically brought our customer to a point where they were always exceeding SLA numbers, and made their customers happy.

Here are few key highlights of the solution:

Ticketing

We implemented an Experience Cloud based solution which allows their customer raise tickets on their own without having to talk to a service rep. The ticket captures all the data to provide service for the mentioned issue. This tool and process streamlined how customers are raising tickets.

Service Contract Based Operations

We converted customer's agreements to their customers into Service Contract and Contract Line Item records in Salesforce, and used them in how tickets are processed.

As soon as the tickets are raised, we convert into executable Work Orders based on associated Service Contract. These Work Orders are used to:

- Allocate technicians
- Keeping tracking of parts using in resolving tickets
- Cost of execution of each work order

This automated Work Order creation and sharing it across systems improved the overall time required to complete a Work Order and accuracy of data.

SLA Tracking

We implemented automated process which keeps track of start and end time on tickets based on well define and agreed criteria.

We also implemented few notifications when a ticket is in jeopardy from the perspective of meeting SLAs.

This helped in easily finding out how many tickets met SLA and how many missed SLA. This resulted in coming up with that information quickly every quarter when there are SLA review meetings with end customers.

Event Based Updates

We started sending updates to customers and internal staff as events happened in Salesforce. AS an example:

- When a ticket is raised, the ticket handling team gets an immediate notification, so they can start working on technician allocation
- When a technician is assigned, customer gets a notification , so that they know their ticket is being worked upon
- When technician arrives at the store, a notification is sent to all internal and customer contacts to ensure everyone is aware of technician's arriva
- When the work is completed, another notifications goes to all involved people

There are many other timely updates which keep the customer and the internal staff up to date in the process.

This led to greater customer success and lesser calls from customer to get the updates on the tickets. The customer service reps were able to focus on more quality servicing tasks now.

Data Sharing Across Systems

We implemented integrations with following systems which did immense help in saving time on duplicating data on these systems:

1. FieldNation marketplace
2. NetSuite ERP

The integrations were done suing 2 methodlogies:

1. Direct API integration
2. Using MuleSoft integration tool

This solution brough following advantes:

1. Saved users time from doing duplicate entries
2. Increase data accuracy as same data was available across the systems
3. Improved the speed on
   a. Technician allocation
   b. Invoicing to customer
   c. Inventory adjustments

As whole, this solution brought lot of efficient in customer's operations and their customer noticed the speed in execution of the tickets.

Benefits

With our solution(s) in place, the customer saw huge time and quality benefits in following operations:

1. Centralized system for processing tickets, emails were out of process now
2. Greater customer satisfaction with timely updates and quick resolutions
3. Totally removed data duplication efforts across system
4. Greater data accuracy and quality due to automaton in gathering and sharing data.
5. Higher SLA achievements and thus saving on SLA panelties