

Enhanced Customer Engagement: A Visual Tale of Seamless Information Flow



Customer Service Representative



Order Entry Associate



Dispatch Manager



Logistics Manager



Field Engineer



Customer



Customer Service Manager

With a focus on increased customer satisfaction and faster turnaround, there is an implicit need for both front-end systems (CRM) and back-end systems (ERP) to be tightly coupled with a seamless flow of information from the “Order to Cash” team to the “Incident to Resolution” team.

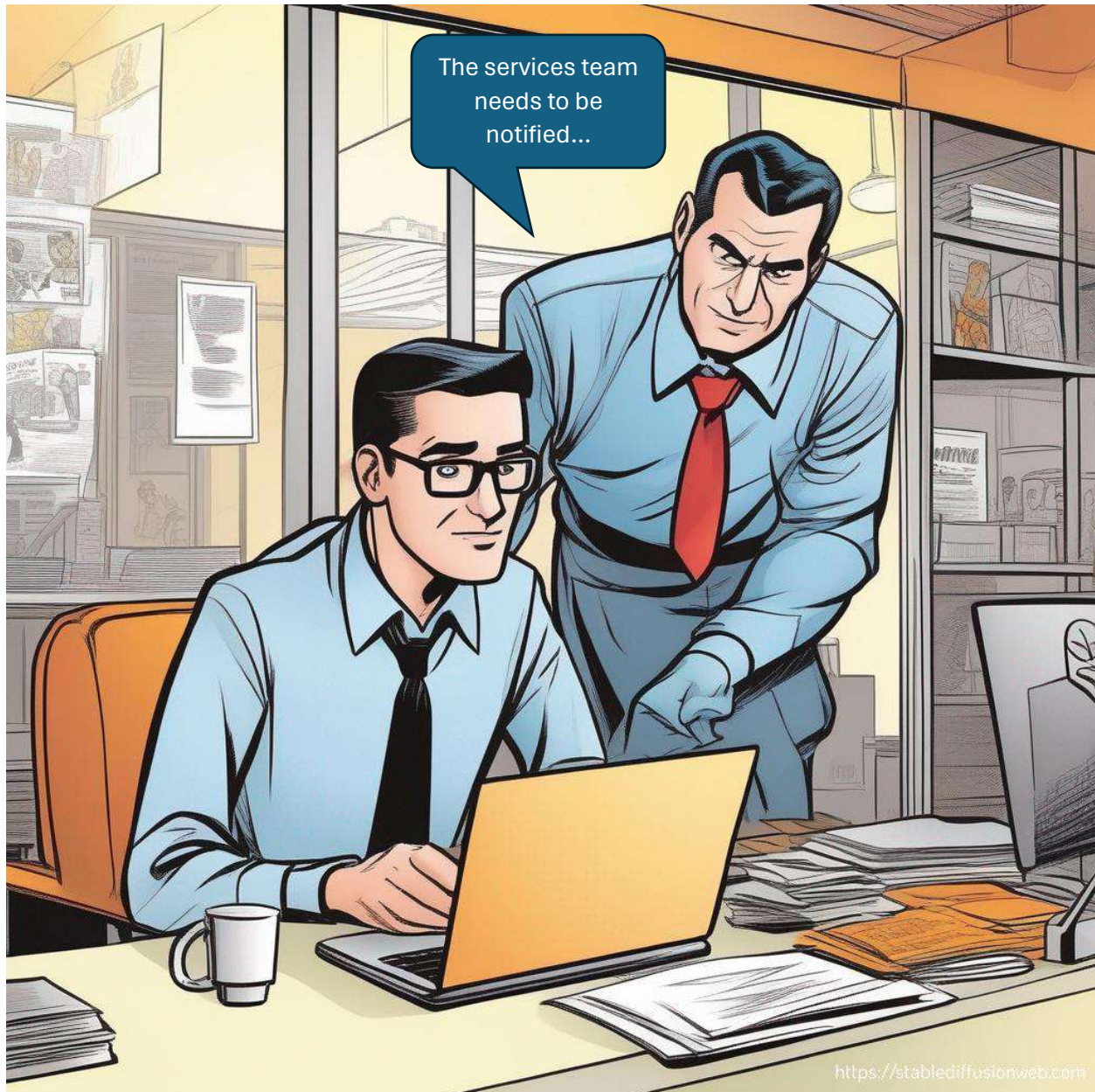
The following comic illustrates a scenario of a customer ordering services along with products and how the information influences all the associated personas: customer service representative, order entry associate, dispatch manager, logistics manager, field engineer, customer and customer service manager.

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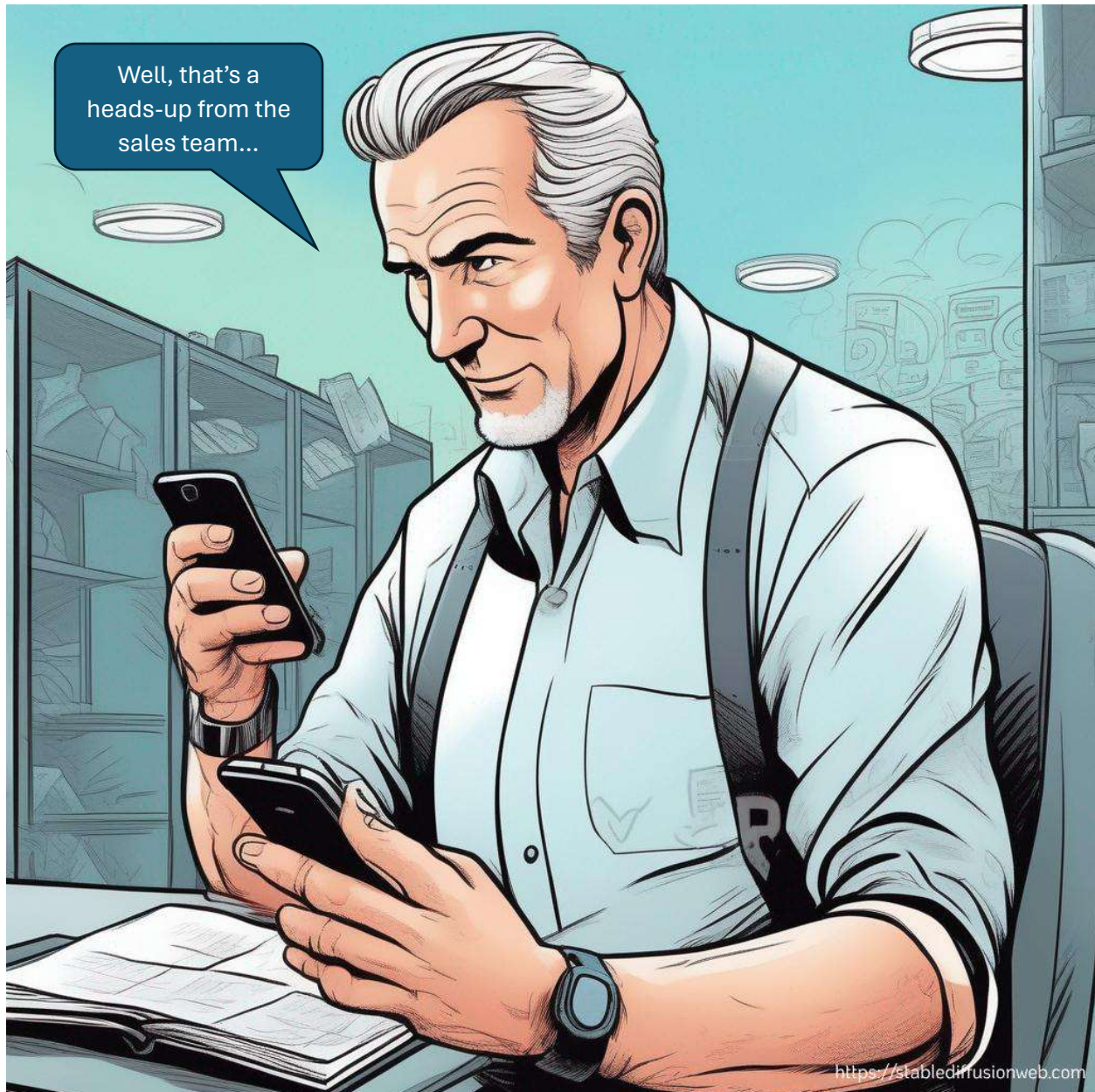


Order Entry: When a customer is ordering finished goods, the sales team has the option to select Installation services if the customer has opted for that. This means that beyond the procurement of the desired finished goods, customers have the opportunity to opt for professional installation services as part of their overall purchase experience.

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Handshake to Services Team: Trinamix provides a solution to auto-create service requests that need installation upon shipment of the finished products. With our system in place, the moment finished products are shipped, the solution automatically triggers the creation of corresponding service requests.

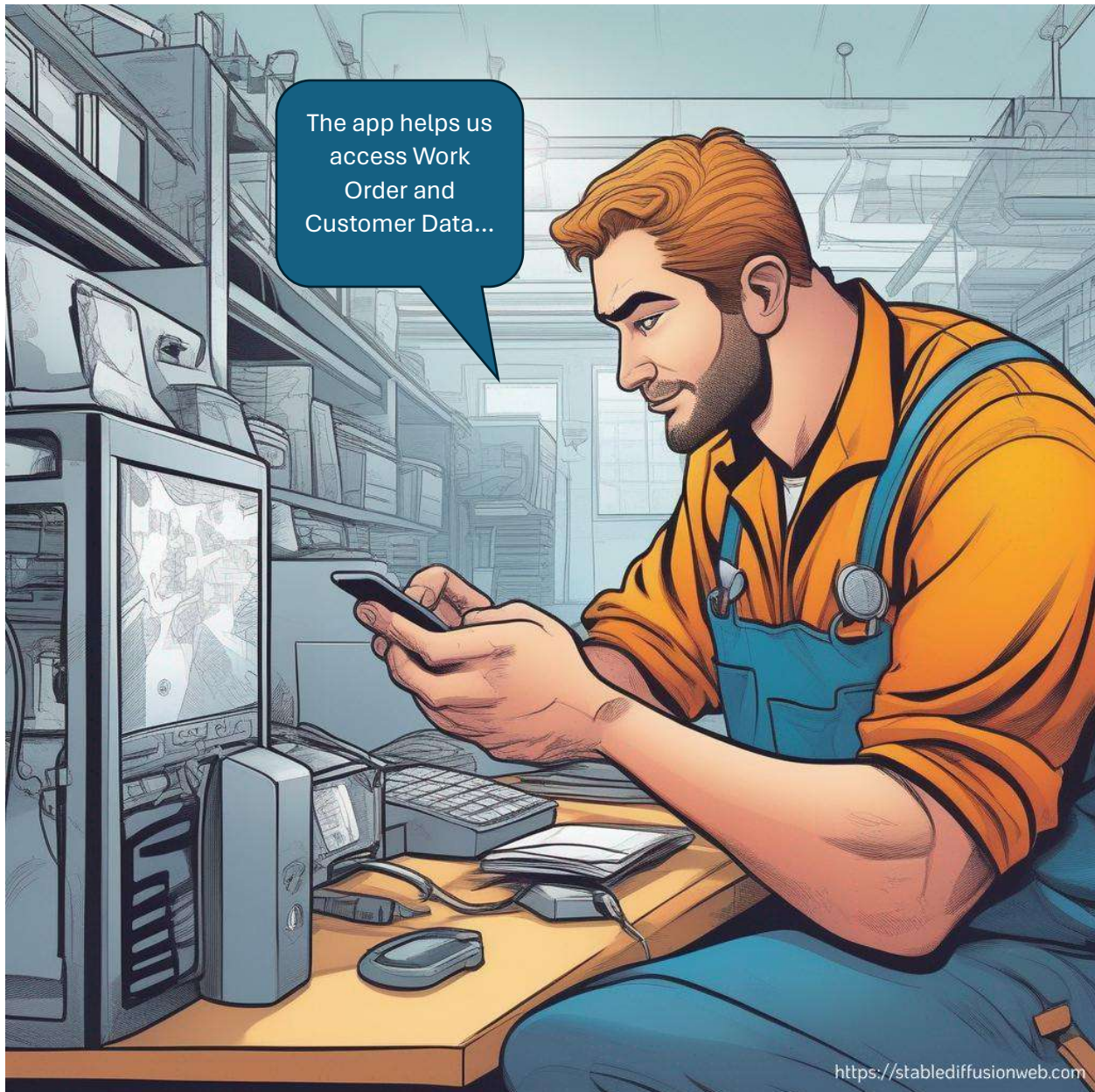


Notifying the Service Team: Once the Installation Service Requests are auto-created, the service manager is notified of scheduling, giving adequate time for planning the field visit. Timely notifications to the service manager empower them to coordinate field visits efficiently, guaranteeing that all essential arrangements are in order and facilitating a seamless execution of the installation process.

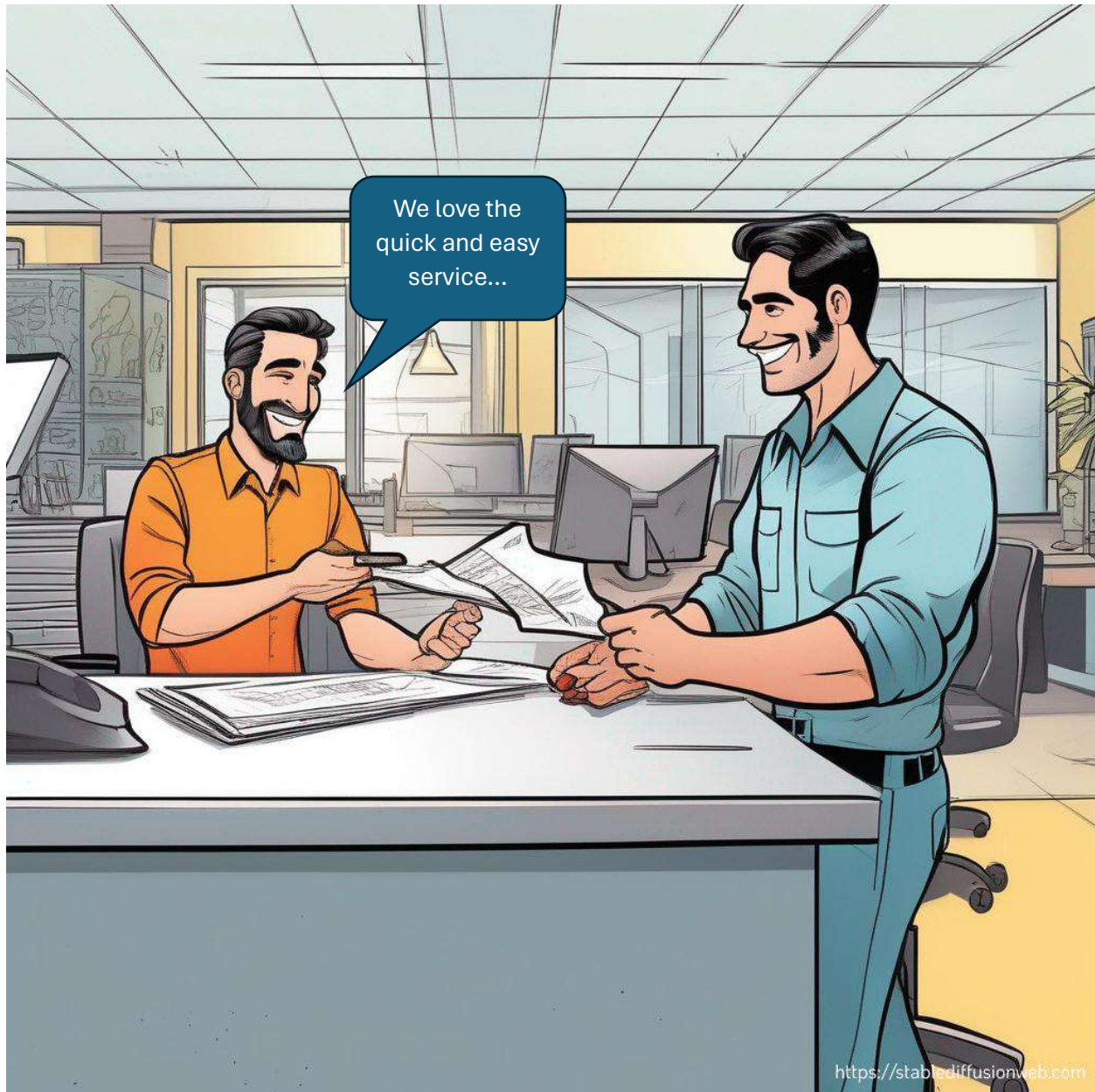
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Field Resource Scheduling: Based on the availability of resources (Technician, Material, Customer availability), the dispatch team plans and takes it further for execution by assigning it to the field technician. This systematic approach ensures that the right resources are available at the right time, optimizing the efficiency of task execution.



Empowering Technicians: Technicians have real-time visibility on customer entitlement, parts availability, and history. During service engagements, technicians instantly access customer entitlements, ensuring compliance with terms. Real-time visibility improves their ability to deliver effective, tailored solutions, enhancing the overall customer service experience.



Delighted Customers: Customers can sign off on the completed work over a phone call while simultaneously having access to billing information. This phone-based sign-off ensures a seamless and transparent interaction, enhancing customer satisfaction by providing a direct and accessible channel for both work validation and billing awareness.



Improved efficiency: Service technicians can be empowered as an extended sales team as they identify opportunities at the customer site, helping the service department move from the cost-center model to the profit-center model. In this new paradigm, service technicians not only resolve issues but also actively drive revenue, aligning the service department closely with business goals and fostering a proactive approach to customer engagement and sales opportunities.



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