

OptimService Modules



Customer Contact Centre

The customer contact centre is the place where all the customer information is gathered together. When talking to a customer you will have everything you need to know i.e. sales, purchasing, financial, equipment installation and history of calls logged by the customer. This will ensure that your customer will receive the best possible service, giving a professional look, improve customer retention and will save you time and money.



Service Lifecycle Planning and Optimisation (Green Service)

This module enables you to plan your incidents so you can more efficiently utilise your internal and external resources by holding the following information:

- Service Level Agreements
- Provision of warranty
- Chargeable/time and materials
- Appropriately skilled staff
- The locality of relevant staff
- Relevant stock

Based on this information, we can do an optimisation run to make sure the entire process is being handled in the most cost-effective and environmentally friendly way. This could enable you to achieve a 30-40% reduction in time and costs.



Mobile Workers Management Portal

Mobile workers can use the portal to plan their day, including planning their route and review their daily / weekly workload. In addition, they can follow the start and end of day safety routines, create sales calls, manage their vehicle stock and check the customer history of their calls. Throughout the call, they can have a workflow which they can follow so that the administration task is less disruptive for their customer.

The direct integration of the mobile portal with the back office enables planners to follow the mobile workers and monitor their progress so they can manage them more efficiently. This will provide a paperless solution which will give you a Return on Investment (ROI) of about 6-9 months.



Sales & Customer Relation Management

When it comes to managing the relationship with your customer, you cannot afford to leave things to chance. Empower your organisation with a strong service and support infrastructure to manage the customer relationship management process with greater efficiency and ease.

Everyone in your organisation, from the dispatchers to the managers and executives, has a 360-degree view of your customers and installed equipment.



The sales solution consolidates and streamlines the sales processes of your organisation, from quote generation through to order processing, at all points of customer contact e.g. including field sales, inside sales, contact centre sales and field service sales. Leveraging all enterprise knowledge pools with the goal to increase sales opportunities, margins and close rates.



Project Management

Our project management is integrated with most of our other solutions and it focuses on planning, deploying and billing service engagements that can extend for days, weeks, months and years. It improves resource planning and allocation, workflow management, consultancy time and expense reporting, subcontractor and vendor invoice processing, customer billing and visibility of service engagements. It is, therefore, an ideal solution for planning people, time, materials, costs and revenue over the periods and therefore provides greater control on your organisation's resources and overall performance.



Customer Portal

By leveraging self-service solutions, your customers can request service and access work order status over the web, 24 hours a day, seven days a week. Additionally, they can look at contract details and information pertaining to equipment as well as request copies of past work order tickets from any web browser.

Security access, as defined by you, ensures tight control on access to sensitive data and a range of features that can be enabled. It also provides another channel to promote and sell more products and services to an existing customer base. End user personalisation and other innovative features ensure the highest levels of intuitive usability, functionality and productivity for customers and your organisation. Intelligent search and information retrieval rank responses by relevance.

On your front line of service, customer self service solutions deliver fast first visit resolutions by drawing on all existing knowledge stored to date and continues to build knowledge with every customer use. Customer self-service capabilities can delay or eliminate the need for contact centre expansion and associated increases in facilities, equipment and staffing costs. Customers become active participants in their service experience, increasing their satisfaction.



Contract and Warranty Management

Easy to use system wide contract and warranty management service delivery and billing, regardless of contract variations resulting in timely, fast and accurate billing cycles. The benefits of implementing our contract and warranty management not only saves time, it enables valuable resources to be reallocated to more important tasks.

The added value of the contract and warranty solution is the support for all types of service including phone support, onsite services for equipment installations, break/fix, metered usage, preventive maintenance and carry in services.

Easy to use templates enable staff to create standard contract quotations with only a few keystrokes. Quotations can be automatically turned into contracts when accepted. The benefits provided through the use of our contract and warranty management encourage a streamlined and efficient process of



which the entire organisation can take advantage, e.g. providing the necessary visibility so all employees interacting with the customers know the contract status, service level, coverage, difference between warranty and chargeable goods and services, supporting automatic and renegotiated contract renewals, full audit trail of contract modifications and invoice history and interfacing with third party financial systems.



Predictive Maintenance

What will happen in the future? When you start to implement solutions such as remote services, Internet of Things (IOT) driven equipment, etc. your organisation will collect more data that can be processed through Business Intelligence (BI). Data science can then be used to predict what will happen to the equipment, software etc. in the future. We will do this by creating models which can be fed by the data collected within your organisation. The data should then be cleaned and further enriched with data taken from social media, the internet or supplier data. With our clever and user friendly dashboards, we can give you the best view on your organisation's performance and predict what will happen in the future so that you can adjust your processes to align with that information.

Benefits:

- Saving time, costs and materials
- Increased customer satisfaction resulting from tackling problems before they escalate
- Improved uptimes
- Customer retention
- An advantage over your competition
- Improved planning



Logistics Management

Logistics management applies best practices to ensure stock levels and movement of inventory keeps pace with service and service related sales activities. Customer satisfaction and staff productivity improve through a higher percentage of first time fixes and faster fulfillment of add-on sales.

The solution supports all warehousing strategies and spare parts management; centralised, regional, repair depot stock, customer site inventories and field technician's personal and mobile inventories. This will ensure stock levels and inventory movement keep in line with service and sales.

Seamlessly integrated with our sales and service applications, OptimService's logistics management enables service organisations to control inventory costs, manage assets and implement proactive service management strategies. The solution features functionality such as purchasing, movement and retirement of materials, which aids in eliminating the overstocking or under stocking of inventory, ensuring successful service delivery and customer satisfaction while lowering field service costs, as well as spare parts management & usage and goods to be sold.

Automated calculation of stock profiles based on usage eliminates overstocking and dramatically reduces costs associated with storing, depreciating and insuring inventory.

Inventory management software, spare parts management also supports the processing of customer returns, vendor returns and vendor warranty claims processing. The application supports spare parts management and tools management for effective field service delivery and Service Level Agreements (SLA) compliance.



We believe that improved cost management improves cash flow by streamlining and shortening the cycles from inventory to usage to billing. In addition, lower logistics costs open opportunities to recognise higher margins on products and services.

Simply put, the time saved through the use of logistics management can now be utilised in other areas.

Key areas to apply this solution include asset management, field service parts management, demand fulfillment and sales fulfillment.



Repair Centre

Depot repair solutions, including repair order and repair management software, automate the tracking of assets through equipment repair chains, including ownership, location, repair status and warranty coverage.

The objectives of using Repair Centre includes:

- Ability to gain real-time visibility of all repair chain activities
- Ensures compliance with warranty and contractual agreements
- Respond to customer inquiries with up-to-the-minute repair status
- Collect and analyse repair statistics for product design improvement
- Reduce overheads such as inventory carrying costs

Improve Productivity & Cost with Repair Centre

- in-house, subcontractor and vendor repair
- customer and vendor exchanges and advanced exchanges
- equipment on loan
- change of ownership, cross shipments and pickups
- consolidated repair orders



Business Intelligence

As we all know the amount of data in our companies is growing at such a fast pace that it is almost impossible for organisations to keep in synchronisation with the data produced in order to give you a proper insight in what you have defined as your goals and strategies.

Your customers are getting more proactive and empowered which means you have to be more agile and proactive in driving your business.

Therefore you need to give people the right information, you empower them to apply the best intelligence of the organisation to the problems at hand, while also proactively planning and driving the business for tomorrow. Regardless of industry, competitive maturity, or depth of technology experience, every service organisation can take specific actions to keep closer tabs on their service operations and maximise contributions to overall company performance. By delivering business critical data at the right time and in the right format, users gain the insight needed to make more informed decisions, and your organisation will be able to:

- Gain insights into determining benchmarks and creating your services dashboard
- Link practices to results
- Understand the key attributes of a good dashboard
- Improve customer satisfaction and experience



- Establish metrics that matter
- Improve customer service and retention

The Benefits: Increased competitiveness and profitability, greater stakeholder value, improved customer satisfaction, and reduced business risk.



Knowledge Base

Embedded in OptimService is the Knowledge Base which is continually updated (when enabled) by each event that is logged in the customer contact centre, repair centre, field service and customer portal.

The Knowledge Base provides advanced functionality for entering queries and results navigation to help users quickly find the information they need. It provides user-friendly access to a vast range of information including maintenance history, repair notes, service call announcements, and much more. The Knowledge Base also provides organisations with the capability to share a variety of information, improve problem resolution times and improve the quality of decision-making across the organisation. The Knowledge Base includes repair statistics based on problems identified and question trees, where a series of questions and answers can be defined to be asked to customers to assist in arriving at a solution.

The Knowledge Base includes features which allows access to work orders, troubleshooting guides and resolved cases that reside in a local shared directory.

This information can also be made available in the customer and mobile worker portal.