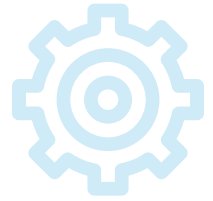


salesforce

The Manufacturer's Guide

Transform the Service Experience





Mapping your service transformation journey

For decades, manufacturers have competed largely on the strength of their products. But today, it is difficult to differentiate on the basis of product alone. Instead, it's the **experience** your manufacturing company provides to your customers and partners that increases **market differentiation**.

A well-functioning service team deepens customer relationships by delivering value and engagement through personalized experiences during the customer and asset lifecycles. And it can provide incremental profits by expanding service-based revenue models.

Why is providing this elevated level of service experience hard to achieve? Part of the challenge is organizational. Customer and field service teams might report into different executives. Different product lines, divisions, or geographic regions may have their own service organizations that handle customers differently. Additionally, systems-based challenges, like working with siloed data in separate systems with no single customer view, accentuate service delivery difficulties.

Finally, the partner ecosystem can be a challenge. Manufacturers may sell and service customers through third-party service providers, distributors, or dealers. You often have little visibility into or influence over the customer service experiences.

So, how can you overcome these challenges and transform the service experience your customer receives?

34%

of buyers

on average are more likely to buy from, and 32% more likely to renew a contract with, B2B-leading suppliers that master customer experience.

SOURCE: "Close the expectation gap with your B2B customers" Deloitte, 2021



Enter the new era of service

This guide outlines a six-phase program to elevate your service experience across the product ownership lifecycle.



The first step is to bring together all your customer data to create a unified 360-degree view of your customer.

Once everyone has access to this 360-degree view, you can then:

- Reimagine your contact centers to support omni-channel engagement, faster case resolution, improved representative productivity, reduced costs, and more
- Elevate field service experiences with efficient and intelligent scheduling, dispatching, and mobile applications
- Deploy self-service capabilities so customers and channel partners can get answers they need easily, make or change appointments, initiate product returns and warranty claims, and more

Then, build on this infrastructure to take your service operation from cost center to profit center:

- Expand your service portfolio with offerings like extended warranties and parts; then extend to IoT-enabled service using artificial intelligence (AI) to evolve from break/fix repair to proactive, predictive maintenance
- Improve service levels with connected assets that offer telemetry data visibility
- Facilitate personalized engagement with customers to build stronger relationships and experiences
- Enhance the service experience by using human representatives with AI agents; this AI-powered system allows for proactive customer support by automatically identifying potential issues and providing solutions using intelligent automation across various customer touchpoints

Let's begin your service transformation journey.



Elevate the service experience from start-to-finish with a unified platform

To elevate the service experience, [start by unifying all customer data](#) across service channels, systems, and processes onto one platform for a 360-degree view of your customers.

A unified data platform helps to remove inefficiencies that reduce productivity. Bringing this all together and making it viewable in one place is the starting point that enables your employees to provide a better service experience to customers across all businesses and regions.

With this platform, you can start your service transformation. The three phases below outline how to elevate your contact center(s), field service operation(s), and self-service portal(s).

Reimagine the Contact Center

Customers calling into your contact center expect to have their questions answered or problems resolved quickly. Having a unified customer view speeds your representatives' responses by removing the "swivel chair execution" of searching for information across numerous systems and spreadsheets.

Building and automating workflows helps standardize business processes, reduce transaction times, and improve customer satisfaction. For example, when opening a new account, a workflow can walk your representative through the process steps and pre-populate available information. Autonomous AI agents can help sales representatives streamline service processes by answering routine questions so you can address more complex customer issues.

AI and routing rules can help direct calls to the right representatives with the right skills to address the specific inquiry. AI agents can also help representatives by surfacing knowledge articles that address customer issues, suggesting next best actions, and personalizing upsell and other relevant offers to better meet individual customer needs.

Lastly, customers might prefer to engage with you through channels besides the phone. Omni-channel engagement options let customers also use email, chatbots, social, or text to connect with you while still getting a consistent experience regardless of channel used.

Elevate Field Service Experiences

"Many customers won't ever meet a salesperson after buying the product, but they will meet a field service person. This is a crucial human touchpoint," said Mike McCaskey, Director of Product Management, Field Service at Salesforce.



No matter how excellent a manufacturing customer's sales experience is, it ends after the purchase is made. Field service technicians provide in-person engagement capable of expanding the customer relationship.

To ensure an excellent customer experience, you can deliver seamless customer engagements by providing transparency into every appointment and giving the entire organization a complete view of all the assets. Additionally, your dispatch system must consider more information than just mobile workers' names and their scheduled service appointments. With AI, augmented reality, and access to customer, company, and asset data, mobile workers with the right skills, availability, and parts get the job done right the first time. This capability can also extend to dealers, distributors, or contract technicians to ensure consistency regardless of who is servicing your customers.

Your 360-degree customer view available via a mobile application provides mobile workers with everything they need to resolve cases at job sites quickly. This includes asset and work history, task lists, workflow automation, knowledge base, video tutorials, recommended next steps, and mobile worker connection via chat, video, or phone.

Deliver Seamless Digital Self-Service

It may seem counterintuitive that less interaction with your representatives and mobile workers improves customer satisfaction, but speed to resolution and convenience can sometimes outweigh the value of the human touch. Today, customers often seek to solve problems and get their own information before reaching out to customer service. The key is to know what types of service and information customers prefer to access directly.

Today's self-service capabilities are so much more than just lists of frequently asked questions (FAQs). Automated workflows, AI, and AI agents help customers quickly get the information or execute the business processes they want, whenever they want. With self-service, customers can:

- Find answers to routine questions
- Track order and shipping status
- Schedule, change, and cancel service appointments
- Order aftermarket/replacement parts
- Initiate warranty registrations/claims and return (RMA) processes
- Troubleshoot and resolve their own equipment and other service issues 24/7
- Opt-in for real-time virtual support from field service technicians.

Self-service benefits your business with fewer calls into the contact center and fewer field service dispatches, allowing representatives and techs to focus on more complex issues. This increases productivity while satisfying customers who are able to resolve issues faster.

By the numbers

Manufacturers who added self-service capabilities saw similar benefits, including:*

26%

decrease in issue resolution time

24%

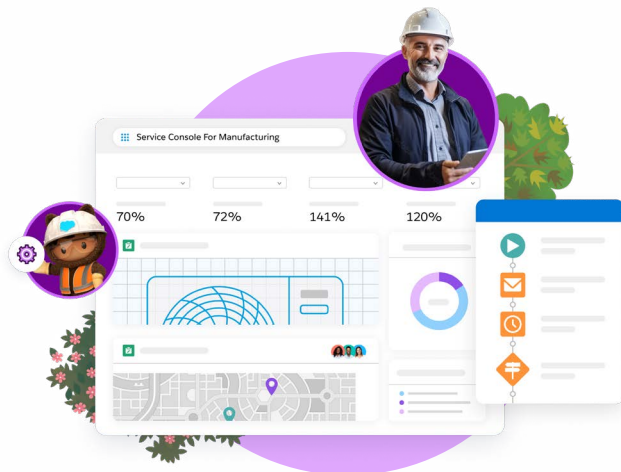
increase in customer satisfaction through self-service

33%

decrease in time to complete business processes supported through self-service

Source: 2024 Salesforce Success Metrics Segment Highlights study. Data is from a survey of up to 70 Salesforce manufacturing customers across the US, Canada, UK, Germany, France, Australia, India, Japan and Brazil conducted from June 30 to July 21, 2022. Results were aggregated to determine the average perceived customer value from the use of Salesforce. Respondents were sourced and verified through a third-party B2B panel. Sample sizes may vary across metrics.





Asset-Centric Service for Manufacturing

Imagine detecting and fixing machine issues before they cause downtime. That's the power of [asset-centric service](#), a strategy that combines customer data with asset data to maximize uptime and increase service revenue.

Asset-centric service addresses this by enabling data-driven decisions, better customer service with proactive and predictive service, improved equipment performance, and unlock new revenue opportunities.

While Internet of Things (IoT) and telemetry data offer a window into machine performance, the real value comes from linking this data with customer information. A single, integrated platform can connect these dots, allowing you to identify potential asset issues and automate service-related actions to address them before a problem develops.

Salesforce's asset-centric solutions provide a complete view and practical insights:

- **Asset Service Lifecycle Management** - Manage the entire asset lifecycle. Drive productivity with a complete view of assets, including warranties, cases, work orders, and claims
- [Connected Assets](#) - Connect asset and customer data to unlock peak asset performance with intuitive visualization, predictive maintenance, and optimization
- **Field Service** - Ensure reliability when it matters most. Anticipate and plan for future work demand. Connect technicians to live asset data, hazards, and priorities

By adopting these solutions, manufacturers can exceed customer expectations, fostering loyalty and growth.



Take your service from a cost center to a profit center

02

In many cases, manufacturers view service as a necessary cost of doing business. Service investment is kept simple and “bare bones” to keep costs as low as possible. But by building on the unified data, processes, and systems established in the previous section, manufacturers can shift their focus toward bringing in new service-based revenue streams.

How can you take your service to the next level?

Connect your asset and customer data

Many of today’s manufacturers run field service businesses that are based around break/fix repairs. This approach inherently leads to customer frustration as equipment downtime can mean thousands of dollars in lost profits per hour.

By adding sensors to your assets and unifying the data with your customer relationship management (CRM) data, you gain visibility into how your products are being used and their real-time operating status. You can analyze the information flowing off the sensors in your products. Connecting the resulting alerts and insights streaming to your service systems enables AI agents to act on them. Examples include:

- Automatically create work orders and dispatch field service calls
- Recommend or place reorders when consumables run low
- Send offers at the “right time” to maximize conversions
- Generate a quote for a new piece of equipment when equipment utilization consistently exceeds recommended limits
- Alert customers of possible equipment issues, advise them on how to fix them, or schedule the repairs for the next regular maintenance visit

Connected Assets help you take service to a higher level and provide individualized customer and product-specific insights.



Expand and monetize service offerings

Analyzing data streams coming from connected assets helps you understand how customers use your products and how they perform over time. The next phase is to monetize these insights. Start simply by:

- 1 Creating, updating, or expanding your extended warranty offerings
- 2 Using telematics data to offer enhanced service agreements that customers find valuable and are willing to purchase
- 3 Creating or expanding your existing aftermarket parts business by offering a self-service ecommerce ordering option

Next, use this expanded product knowledge to develop new service-based offerings such as preventative, proactive, and even predictive maintenance services. This information can also be used to target assets nearing end of life for upsell opportunities.

Finally, consider adopting a servitization model where you bundle your product with service and sell it through a subscription or pay-per-use revenue model. For example, a medical MRI manufacturer could offer an MRI-as-a-service subscription where the customer would pay per scan rather than buy the machine, and the manufacturer would install and maintain the MRI machine over the course of the contract.



Transition from supplier to trusted advisor

According to the [Trends in Manufacturing report](#), 97% of manufacturers are pursuing strategic changes to their service and aftermarket operations. This highlights that manufacturers recognize the competitive opportunity of using service to build ongoing service-based relationships with your customers and maximize new business models to grow revenue.

Humans with agents can provide personalized tips and proactive updates that help customers use the products more effectively. Showcase the value of connected asset data and services you provide by:

- Recommending ways to get the most out of their products based on product-specific usage and status data
- Summarizing routine and proactive maintenance work performed to keep equipment running efficiently
- Notifying customers when to order replacement supplies, and even pre-populate an ecommerce cart with items needed to make ordering easy

Customer feedback is vital to the continuous improvement of their experiences, and consequently, your differentiation in the market. Reach out to customers regularly to capture their feedback through surveys and reviews.

By transforming the service experience, you create an ongoing relationship with your customers that drives incremental revenues and profits that are less vulnerable to economic cycles.



Koenig & Bauer Customer Story

Koenig & Bauer is the world's oldest press manufacturer with the broadest product range in the industry. Specialist engineers conduct the majority of the company's service repairs and maintenance on-site.

With [Service Cloud](#), Koenig & Bauer engineers remotely enabled agency engineers and customer staff to execute complex repairs and maintenance. With video support technology, and in some cases augmented technology, they can walk them through any procedures that require their specific expertise. Having enabled their equipment with IoT, they also continuously monitor asset usage data, and recommend proactive maintenance to avoid unplanned downtimes. In addition, Koenig & Bauer established a self-service portal for customers to have a centralized place to get help and resources 24/7. Koenig & Bauer has seen a double-digit increase in customer portal users and the use of video-supported calls.

61%

of customers

say most companies treat them like a number, showing the opportunity of building ongoing service-based relationships.

SOURCE: [Salesforce State of the Connected Customer](#)



How do I get started?

In this guide we've outlined how you can transform your service operations to provide better customer experiences, strengthen customer relationships, and generate new service-based revenue streams.

You may be wondering how to get started, especially if you're just beginning your service transformation journey. It all starts with creating your single source of truth on a single platform. This is the foundation for all the phases we discussed.

But even before that, it is important to develop a vision of your service end state. Each manufacturer's service operation can be different, so define the capabilities you want your service operation to support once your transformation journey is complete.

Salesforce is here to help you by providing detail on service capabilities, architectures, and products you can use to build your vision and the roadmap to get there. You can [reach out to us](#) – we are here to help you turn your service operations into a competitive advantage!

Learn more about how you can provide differentiated service experiences with Manufacturing Cloud for Service. [Watch Now](#)

By the numbers

Manufacturers who have taken steps outlined in this guide are experiencing the following results*:

33%

increase in customer satisfaction, customer effort, or Net Promoter Score

32%

decrease in average handle time

28%

decrease in service/support costs

31%

of cases or customer issues deflected via self-service

*Source: 2024 Salesforce Success Metrics Segment Highlights study. Data is from a survey of up to 70 Salesforce manufacturing customers across the US, Canada, UK, Germany, France, Australia, India, Japan and Brazil conducted from June 30 to July 21, 2022. Results were aggregated to determine the average perceived customer value from the use of Salesforce. Respondents were sourced and verified through a third-party B2B panel. Sample sizes may vary across metrics.



