

ServiceMax Enables LiftOne to Increase Revenue & Provide a World-Class Customer Experience



LiftOne wanted to improve and modernize the customer experience and put information directly into their technicians' hands to optimize their resources and manage end-to-end processes. In 2017, they sought out a cloud-based, field service management solution to replace their clunky, 15-year-old tool and pen and paper processes.

Since 1926, LiftOne, a CTE Company (formerly Carolina Tractor & Equipment Co.), has been a material handling and warehouse solutions supplier of choice throughout the Southeast. With 18 full-service dealerships, LiftOne is a premier provider of material handling equipment such as forklifts, aerial lifts, industrial vehicles, and railcar movers from top brands. LiftOne's custom rentals, parts, service, warehouse design, and engineered warehouse solutions allows customers in industries like automotive manufacturing, lumber, steel, food distribution and more have the lowest total owning and operating costs.

Today, LiftOne relies on ServiceMax's industry leading field service management platform to drive a world-class customer experience. LiftOne leverages ServiceMax's powerful installed base, work order management, scheduling, contracts, and reporting capabilities to improve the technician experience, reduce invoicing delays and inaccuracies, and drive higher loyalty among customers.

Optimizing the Productivity of Technicians' Resources

For LiftOne, the service side of the business has always been a competitive differentiator. As the company grew organically and via acquisitions, they recognized that it would be difficult to scale without an overhaul of their 15-year-old field service tool and old-school paper processes. Their system was difficult to train on, difficult to enhance, and made it hard to extract valuable information that customers were looking for. Paper processes meant

that technicians wasted valuable time transferring paperwork back and forth and had no way to look up asset history and information while on the job.

"Our technicians were flying blind a lot of the time. There was little ability for them to do research on the customer, on open service work, or work that had been done to the machine prior to them coming in," said Mark Drummond, President and General Manager at LiftOne.

In the search for a field service management solution, LiftOne prioritized finding a solution that offered a great experience for their technicians and back-office staff and allowed for the extension of a mobile platform to technicians to access and act on vital customer information.

After reviewing four different platforms, the LiftOne team identified ServiceMax as the provider who could solve their user experience and customer experience issues and offer the flexibility to grow and innovate with their business.

"ServiceMax was clearly the best choice, and now three years later, ServiceMax remains the best solution for field service management in an asset-intensive industry like ours," said Elvis Clemetson, Chief Information Officer at LiftOne.

Optimizing Efficiency with a Digital Process

Before ServiceMax, technicians spent a lot of their time on unproductive tasks like writing up paperwork, sitting on hold, calling the office for parts, and extraneous travel to go back and forth to customer sites. The overwhelming amount of paperwork also meant that technicians would lose track of work in process, sometimes putting unaccounted hours onto internal jobs when they were actually spent on a customer.



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Mark Drummond, President and General Manager, LiftOne

>> Customer Quick Facts

INDUSTRY:
Material Handling

SIZE:
3,000 employees, 400 technicians

HEADQUARTERS:
Charlotte, North Carolina

WEBSITE:
www.LiftOne.net

ServiceMax's Dispatch Console to allow dispatchers to select the best-qualified service technicians for keeping customers' equipment running. With these process upgrades, technicians spent much more time repairing customer equipment, resulting in technician productivity (percentage of time spent on productive activities) reaching 90%.

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Another challenge LiftOne faced prior to ServiceMax was the delay that customers experienced between the time they received a service visit and the time they received an actual invoice. This delay made it difficult for technicians to plan their day and for customers to plan for service expenses and even made them question the validity of some of the work. For LiftOne, the billing department operated off of paperwork, sticky notes and tribal knowledge which resulted in slow invoice times and problems with invoice accuracy. These problems were magnified when there was employee turnover as specific customer needs and preferences weren't well tracked and recorded. Using ServiceMax's system and its focus on Installed Base Management, the LiftOne team was able to streamline its invoicing processes.

"We used to get comments from customers, monthly, talking about inaccuracy in invoices and delays. It was our number one issue. Today, that doesn't even hit near the top 10," said Mark Drummond.

Visibility into operations has also provided LiftOne with access into key business metrics like time to repair, response time, billing times and more. With the

Result

- ↑ 10% billed revenue hours with same headcount
- ↑ 90% technician productivity
- ↑ 85% NPS Loyalty Score
- ↑ 80% same day repair
- ↓ Reduced DSO and customer invoicing complaints





aid of these metrics, the leadership team is able to drill into key areas and uncover roadblocks impacting the customer experience. "We wouldn't even be having the types of conversations we are having now if we were on our old system," said Ryan Kraft, VP of Operations at LiftOne.

Harnessing AI & Material Handling as a Service

Looking into the future, the LiftOne team plans to further leverage ServiceMax to make continued improvements to its invoicing, parts stocking, and dispatching processes while making a significant move toward proactive customer management.

"We think there's a large opportunity around continuing to automate some pretty heavily manual processes," said Ryan Kraft.

In addition, the LiftOne team has its eye on turning the data ServiceMax provides into actionable insights that allow them to put even better insights and information into their technicians' hands while meeting shifting customer expectations.

"Our customers don't want to be expert fleet managers, they want to be good at what they do and they expect us to be the best at what we do in preventing unscheduled downtime and managing their cost of service," said Mark Drummond.

"Customers are looking for material handling as a service, and our ability to be ahead of the curve will keep us competitive. We believe ServiceMax is what will enable us to offer this type of service, and combined with our industry leading technicians, will allow us to be better at it than anybody else."

About ServiceMax

ServiceMax's mission is to help customers keep the world running with asset-centric field service



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Elvis Clemetson, Chief Information Officer, LiftOne

management software. As the recognized leader in this space, ServiceMax's mobile apps and cloud-based software provides a complete view of assets to field service teams. By optimizing field service operations, industries with high value, complex, mission-critical equipment can support faster growth and run more profitable, outcome-centric businesses. For more information, visit www.servicemax.com.

About LiftOne

At LiftOne, we strive to be our customers' trusted partner. As industry experts, we know material handling and warehousing top to bottom, so we only provide the industry's highest-value products supported by top-of-the-line parts and superior customer service. Our customer-focused team builds positive, lasting relationships designed to give our customers a competitive edge. Our custom solutions—from fleet management and rentals to engineered warehouse systems—provide the lowest total owning and operating costs, and free our customers to focus on their core businesses. For more information, visit www.liftone.net.