

TECHNOLOGY INNOVATION FOR A TECH INNOVATOR

Connecting Sales and Service Amidst Rapid Growth at Lowry Solutions



Challenge

Lowry Solutions specializes in full lifecycle traceability of customer assets, which requires sophisticated IoT platforms to power the services they provide. Their previously siloed systems left them with incomplete and disparate data, and a lack of automation slowed down processes and required manual entry and research (e.g., looking up service level agreements and entitlements for customers manually).

As the business grew and evolved, and they diversified their products and services, Lowry knew they had to streamline and consolidate their IT systems and internal processes to better serve customers and drive more agility in their service business. At the same time, they were looking to generate additional revenue through service contracts by improving entitlement visibility while increasing customer satisfaction and operational efficiency.

Lowry leadership knew they could better serve their customers, scale the business, and obtain clear visibility of key performance indicators and financial metrics with a single, cloud-based system that connects sales and service by enabling a 360-degree view of the customer relationship. Lowry Solutions partnered with Salesforce, ServiceMax and Bolt Data to extend their use of Sales Cloud to create a seamless service solution that would address the above challenges, and ultimately improve customer satisfaction.



By leveraging data from Salesforce Sales Cloud, Salesforce Pardot marketing automation, and ServiceMax, Lowry is able to drive automated campaigns for assets without attached service contracts and achieve universal visibility across all parts of the business. These powerful insights allow different team members to access existing account and contact data from Salesforce as they engage with customers, and tech support reps and coordinators can leverage Salesforce tools like email integration and Chatter.

Solution

Lowry chose a comprehensive field service solution delivered by Bolt Data and using Salesforce Field Service and ServiceMax Asset 360 cloud-based solutions. This provided Lowry Solutions with the process optimization and system centralization it needed most. Bolt Data applied expertise with field service, depot processes and contract entitlement best practices to help meet Lowry's overall business goals for systems consolidation and process enhancement.

By first understanding Lowry's requirements for product lifecycle management, Bolt Data recommended best practices to optimize workflow both across and within service sales and renewals and service delivery – saving time, reducing duplication, and powering operational efficiency. The integrated field service solution now enables optimized field service and depot processes, better data management, and improved customer satisfaction:

- Sophisticated contract management and entitlement automation that maps to the realities of how Lowry customers buy, deploy, and receive service for their products



We anticipate a 7% improvement in our contract attach rate and a 15% improvement in contract renewal rates within the first year. We expect to drive this result through automated notifications when customer contracts are about to expire and outbound campaigns to products not currently covered by a contract.”

Sean Lowry, Sr VP of Sales and Service, Lowry Solutions

>> Customer Quick Facts

INDUSTRY:
Information Technology and Services,
*Provider for Shipping, Logistics,
Supply Chain and other verticals*

HEADQUARTERS:
Brighton, MI

WEBSITE:
lowrysolutions.com



• Asset lifecycle management that ensures products, components, and parts are managed from installation to decommission, including depot repair processes such as:

- With repair and return, products come into the Lowry service center, get repaired there or at an OEM partner site, and then sent back to the customer. All stakeholders can track and trace the affected assets at every step of the repair process.
- With advanced exchange, equipment pre-purchased by the customer is staged at the Lowry site, ready to be deployed to the customer should another unit fail or require repair. When this happens, the customer sends the unit for repair to Lowry, and Lowry sends the customer the staged unit, minimizing downtime and reducing inventory exposure.

The solution includes a centralized customer contact center with streamlined dispatch and scheduling. The robust platform empowers service personnel with automated contract and warranty entitlement, vendor PO information, and RMA/depot repair management.

With automated entitlement processes from ServiceMax Asset 360, the system determines repairs that are covered by a warranty and provides this information to coordinators in the call center. This saves time, eliminates leakage or missed upsell opportunities, and enables the call center to better service customers.

The system also tracks various types of customer contracts (onsite business, depot-related services, software, and more), granular pricing terms for labor, parts, and consumables, and service level agreement (SLA) milestones. As soon as a customer work order is generated, all the pertinent information is already in place, with SLA milestone clocks set to ensure accurate delivery on warranties and service contracts.



They brought a deeply knowledgeable team that worked hard to understand our requirements and turn them into reality. The entire organization has been fully immersed in this project, including me, and we are looking forward to the next steps in Lowry Solutions' continued digital transformation."

Mark Muehlenbeck, Chief Financial Officer, Lowry Solutions

Solutions:

Salesforce Service Cloud, Salesforce Field Service, ServiceMax Asset 360

Services:

Implementation and integration services, consulting for best practices by Bolt Data



The system's connected structure also allows real-time updates on repairs, so Lowry coordinators can easily monitor completion of work orders by their technicians as well as repairs by 3rd-party technicians contracted for specific jobs.

Bolt Data further streamlines the solution by automatically generating work orders for preventive maintenance based on detailed contract entitlements. With a combination of IoT sensors installed on assets and historical and real-time asset performance data, Lowry Solutions' network of service personnel can provide usage-based preventive maintenance before unplanned downtime occurs.

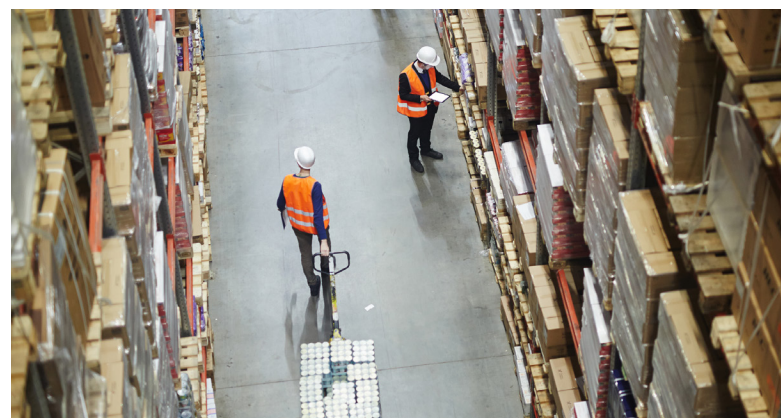
Future phases of the Salesforce and ServiceMax rollout by Bolt Data will include a customer community and integration with Lowry's new ERP system, furthering the seamless flow of information from customers and 3rd party contractors to the service organization, with financial information flowing into the ERP system.

Expected Results

In preparation for the go-live, Lowry personnel has trained over 15 service professionals to be ready for the extensive upgrade to their systems and processes. "Based on what we have seen during systems testing and training, we are confident that our goals for the project will be met," said Sean Lowry, Sr VP of Sales and Service. "We anticipate a 7% improvement in our contract attach rate and a 15% improvement in contract renewal rates within the first year. We expect to drive this result through automated notifications when customer contracts are about to expire and outbound campaigns to products not currently covered by a contract."

Expected Results

- ↑ Increased contract attach rate by 7%
- ↑ Increased contract renewal rate by 15%
- ↑ Better visibility of key metrics and financial reporting
- ↑ Improvements in MTTR with customers and/or via partners
- ↑ Sustained and/or increased customer satisfaction





The integrated solution is also expected to fuel the growth of service revenue for Lowry Solutions. By providing visibility into service entitlements across service and operations, ServiceMax Asset 360 protects against leakage from incorrectly entitled work orders and uncovers service upsell opportunities. Service costs are also expected to decline, enabling Lowry technicians to be more productive and provide high levels of personalized service while lowering mean time to repair. Overall systems cost of ownership will also decline due to the consolidated IT infrastructure and the Salesforce architecture's modern toolset that enables system changes with no or low-code tools.

"Working with Bolt Data on the Salesforce Field Service and ServiceMax Asset 360 project has been a wonderful experience. They brought a deeply knowledgeable team that worked hard to understand our requirements and turn them into reality," said Mark Muehlenbeck, Chief Financial Officer at Lowry Solutions. "The entire organization has been fully immersed in this project, including me, and we are looking forward to the next steps in Lowry Solutions' continued digital transformation."

About ServiceMax

ServiceMax's mission is to help customers keep the world running with asset-centric field service management software. As a recognized leader in this space, ServiceMax's mobile apps and cloud-based software provide a complete view of assets to field service teams. By optimizing field service operations, customers across all industries can better manage the complexities of service, support faster growth, and run more profitable, outcome-centric businesses. For more information, visit www.servicemax.com.

About Lowry Solutions

Founded in 1974, Lowry Solutions has transformed from a computer peripheral equipment reseller into an industrial IoT (Internet of Things) solutions provider that specializes in supply chain tracking and traceability solutions, enterprise mobility, and managed print services, all of which enhance accountability, process control, and operational effectiveness.