

# Data-Driven Transformation: Redefining field service to deliver greater customer experiences



## The challenge

Since 1969, Robert Dietrick Company (RDC), an independently owned family business, has established a formidable reputation for delivering specialized industrial solutions, including loading dock equipment, industrial doors, safety barriers, HVLS fans, and industrial curtains. It provides 24/7 support, preventative maintenance, and emergency repairs for all its industrial products, focusing on enhancing operational efficiency, safety, and minimizing downtime for customers, primarily across the Midwestern US states of Indiana, Illinois, Kentucky, and Michigan.

Like most successful industrial organizations, RDC knew it needed to digitally transform its business to provide more efficient services, gain higher customer satisfaction and loyalty, and improve overall efficiency and operational scalability. Its service business was an area ripe for transformation. While the company had already moved from manual paper-based systems to digital technology, its existing field service tool lacked the breadth of functionality and data reporting capabilities required to continue to advance the quality of service to its customers. A lack of asset visibility for customers was impacting RDC's operational efficiencies and scalability, and how it engaged with and managed customers. The company evaluated ServiceMax in 2019 and implemented the following year.

"Before we implemented ServiceMax, we had a field service tool, but we didn't have centralized data, and we had inaccurate or no reporting capabilities," said Patrick Miller, Director of Innovation at RDC. "It was a static tool that had been the same for a couple of years."

The existing field service tool lacked centralized data management, making it difficult to access and utilize service-related information effectively. Assets were not logged in the system, so their service and maintenance history were impossible to review. The tool also did not offer the flexibility to grow with the company's evolving needs, limiting RDC's ability to innovate and improve its service offerings. On top of this, a lack of or inadequate reporting meant that the company did not have a full view of its customers and services, and therefore leaders could not make confident, data-driven decisions.

## The solution

Driven by a desire to usher in a new era of efficiency and customer satisfaction, overcome the limitations of its existing system, and harness all the benefits of an enterprise-grade field service management platform, RDC selected and standardized on ServiceMax.

With the help of its implementation partner, [Uptima](#), RDC deployed ServiceMax solutions in phases to transform its service operations. The first phase included [ServiceMax Core](#), ServiceMax's comprehensive asset-centric field service management platform, which was deployed to proactively manage RDC's field service operations, including work order management, scheduling, and dispatching. In conjunction, RDC deployed Zinc as a communication tool for its technicians for secure, real-time communication with each other, with experts and with management for faster issue resolution.

As part of its second phase, RDC is in the process of rolling out [ServiceMax Customer Community](#), which it is branding as **RDC Digital**, enabling its customers to log and view service and maintenance cases via a dedicated customer portal. The portal includes features such as creating service requests, viewing and paying invoices, and communicating with RDC.



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Patrick Miller, Director of Innovation, RDC

## >> Customer Quick Facts

INDUSTRY:  
Industrial solutions

HEADQUARTERS:  
Fishers, Indiana

WEBSITE:  
<https://rd-co.com/>

Additional enhancements and features will follow in the coming months. Its third phase will include [ServiceMax Data Guide](#) in the coming months, so technicians can efficiently capture and present data for specific tasks, such as inspection, maintenance and safety.

"What particularly appealed to us about ServiceMax was that we could centralize our data, making it easily accessible and visible to our technicians, sales, admin and management," said Miller. "This centralization of information allows us to make more informed decisions and to have more meaningful, data-driven conversations with our customers, and to be better at overall data collection and visibility."

By centralizing communication around work orders, for example, RDC ensures that all relevant information is readily available to its entire team. This not only improves internal coordination but also enhances the overall efficiency of its service operations.

"We adopted a mobile-first approach, equipping our technicians with iPads and iPhones so they can run and access the ServiceMax platform," Miller added. "Our technicians can work and upload data efficiently onsite, even if they're offline, and deliver a higher quality of service and visibility to our customers. The data insights have been remarkable. Our technicians can access work orders and asset information, which enhances their productivity, reduces downtime, and seamlessly connects them with our customers, enhancing customer experience and satisfaction."

- ✓ Reduced manual work and improved scheduling efficiency
- ✓ Consistently meet and exceed customer expectations
- ✓ Full visibility and tracking of service history of each asset
- ✓ Ability to track and improve KPIs, including first-time fix rates
- ✓ Using data to learn from past service issues, continually enhancing service quality
- ✓ Smarter decisions for the business based on accurate data insights
- ✓ Culture of connectivity for technicians, management and customers
- ✓ Complete tracking of entire product lifecycle - from installation, upgrades and parts to maintenance jobs



## The results

The implementation of ServiceMax has brought about transformative changes at RDC, delivering significant improvements across the board. The digitalization of service processes has reduced manual work and improved scheduling efficiency, enabling RDC to consistently meet and exceed customer expectations.

Customer satisfaction has also seen a marked improvement. With the ability to track service history and key performance indicators, such as first-time fix rates, RDC is now able to provide more reliable and effective service. Thanks to ServiceMax, RDC has been able to build a customer facing portal, further enhancing customer service, speed, visibility and satisfaction levels. The company is also using its data to learn from past service issues, continually enhancing its service quality.

"We've been able to meet and exceed customer expectations using ServiceMax," Miller says, pointing to the positive impact of data-driven decision-making. "It's also created a culture of connectivity for us. Technicians out in the field and management back at the office now have the latest, accurate information from technical fixes to contracts and warranties. It's made an immediate impact on productivity, retention and customer satisfaction."

ServiceMax's continuous cloud-based innovation means RDC can now stay at the forefront of field service management. By regularly assessing and adopting new features and updates, the

company ensures that it is always leveraging the latest technological advancements to optimize its operations and customer satisfaction levels.

"We always want to stay within one release of the most up-to-date version to take advantage of the newest functionality that ServiceMax has to offer," said Miller. "With ServiceMax, we now have a complete and intelligent field service solution that tracks the entire product lifecycle, from installation, upgrades and parts to maintenance jobs.

"Our goal is to continually improve the business using data, reporting and service insights. ServiceMax has given us the ability to pull data to make smarter decisions for how we conduct our service business and how we operate and manage our customers."

RDC's journey with ServiceMax illustrates the power of technology in overcoming operational challenges and achieving new levels of service excellence. The proactive approach to digital transformation has set a solid foundation for RDC's future growth and continued leadership in the industrial facilities sector.

"Our goal is to be nimble so that we're not just a really strong provider, but also a partner for our customers," concluded Miller. "With the asset-centric approach that ServiceMax has given us, data is helping inform that direction and the direction we'll go in the future. For us and for our customers, it's been a gamechanger."