

Customer Support, CRM, and Contract Management System Provides Vital Analysis of Service Costs and Improved Decision Making



“We didn’t know we needed such a customizable piece of software until we really got into the project. EnterpriseWizard gave us everything we needed.”

Brian Pollock, North America East Service Manager

Business Overview

DCG Systems provides state-of-the-art analytical equipment to integrated device manufacturers (IDMs), wafer foundries and fabless chip companies worldwide. Their innovative systems aim to lower the cost of analysis and provide competitive cost and performance advantages.

Challenges

When DCG Systems spun off from its parent company, they needed a full CRM and asset tracking system to manage worldwide Customer Service operations. And they needed it quickly. The new system needed to be affordable. It also needed to be easy to customize so they could do much of the implementation themselves, as they had a limited consulting budget.

The system was to support a worldwide staff of 40-45 Field Engineers in their efforts to service DCG equipment. The bulk of service cases would be handled by Field Engineers in response to customer phone calls or e-mail. Engineers would also submit tickets when they found customer issues on their own.

DCG needed real-time online access to essential equipment information. They also needed to be able to submit cases and time spent from field locations. So a web-based interface was essential.

More importantly, DCG needed a way to measure its total cost of service and the costs and reliability of different systems and product lines. Various points of information were scattered throughout the company over different systems, but there was no way to bring it together. Without clear cost information, they had no way of measuring the profitability of contracts for specific product lines.

One of the goals was therefore to bring all the relevant information into one system with analytical tools to inform better business decisions about service pricing.

The first step was to provide more complete data and reporting on system and product line performance, repairs, and downtime.

The next step was to gain insight into direct costs. This meant tracking Field Engineer time and expenses related to particular machines and customers. It also meant improving part tracking. DCG could see what parts had been ordered for a machine, but had no idea if a specific part was actually used.

Ultimately, the system needed to capture and tabulate *all* direct costs identified with a service case. In addition, it would need to incorporate variables and formulas to calculate reliability data.

Industry

Semiconductor Manufacturing Analysis Equipment

Challenges

No visibility into cost of service

Unfocused performance and reliability data

Dispersed information handled by multiple separate processes

EnterpriseWizard Solution

Customer Support and Field Service

Full Cost Tracking and Analysis

Asset Performance/Reliability Tracking

Contract Management

Parts Ordering and Shipping

CRM— Sales Automation

Hosted SaaS Service

Solution Benefits

Rapid implementation, lowering development costs

Consolidated Data enables better reporting and analysis

Reduced Support Response Time

Phone Calls Reduced

Contract and Parts Management Automated

Overall Efficiency Improved

EnterpriseWizard Solution

DCG chose EnterpriseWizard's cost-effective hosted SaaS solution. With this monthly service, the company did not have to purchase or maintain hardware, and their IT resources were free for other tasks.

The key for DCG was to consolidate their data in one system and organize it in the way they wanted. EnterpriseWizard's sophisticated data model made this easy: "EW was leaps and bounds better than Clarify for arranging our data the way we wanted to see it," says Brian Pollock.

Customer Support

DCG wanted to ensure that cases could only be opened for valid equipment serial numbers. With all the equipment information stored in a related table, this was a snap. When staff members create a new case, they simply enter a valid serial number into a required linked field, and EnterpriseWizard populates the case with all of the relevant information for that piece of equipment, including the customer, site, contract status and so on. Thanks to a sophisticated data model, it is also then possible to see all support cases opened for a given system in the system record and to run reports on total time spent, parts ordered, etc.

Direct Cost Tracking

Adding a related Expense table enabled tracking of all expenses. These can be related to cases, systems, and sites. Each support case shows and totals the actual expenses (both parts and labor) accrued during the course of the case, even applying a complex variety of labor billing rates based on different criteria. Since the case records are already tied to systems and sites, DCG can report on total cost of service related to any of these components.

Parts Management

In addition, a Parts Used table holds records of the parts used for repairs or maintenance related to systems and support cases. Users can create these records only through the Case record, ensuring that parts ordered always match parts used, and that both are always related to a support case. Users can even click a button in a parts record to view the shipment status at the shipper's website. [See how!](#)

Equipment Reliability and Performance Tracking

EnterpriseWizard now gathers and reports on all system performance and reliability data. As a result, DCG can easily calculate data such as Mean Time Between Failure (MTBF), Mean Time to Repair (MTTR), and Availability for each system and can view trends by product line and location.

Contract Management

With a complex customer support system, contract management is crucial in keeping the operation running smoothly. EnterpriseWizard provides cradle to grave contract management, automating the sales process, fulfillment, and renewal of each contract. It even forecasts future contract revenues.

Contracts start out in a state of Quoting, and once a customer PO has been entered, the Status changes to "Valid" automatically and EnterpriseWizard e-mails the Accounting Team with details from the contract record, along with an attached copy of the PO and quote.

The system also sends reminders for contract renewals. If a customer PO for a contract renewal hasn't been received, EnterpriseWizard sends e-mails to the appropriate staff at specific intervals. If the Contract End Date passes without renewal, an e-mail is sent to the customer with a notice that the contract has expired.

"The more we work with EnterpriseWizard, the more things we find for it to do. It has become a running joke - whenever we have a problem to solve, say, a broken coffee maker, we say 'EW can fix that!'"

— Brian Pollock, North America
East Service Manager

Extending the Initial Implementation

The initial implementation used 7 days of consulting by the EnterpriseWizard team, which included developing the specification and structure and completing the customization for the initial roll-out.

Since then, DCG's own administrator has extended the system to provide further sales automation, lead tracking, and contract revenue forecasting, using the default CRM templates included in the package and creating additional tables as needed. All new functions are added through the browser-based administrative interface without any programming.

Benefits of the EnterpriseWizard Solution

Rapid Implementation - Under a tight timeline, EnterpriseWizard implemented the new system quickly in just 7 days of consulting time. So the system was ready when DCG needed it.

Consolidated Information - Perhaps the greatest benefit of the EnterpriseWizard implementation for DCG is that now all of their service information is in one place. They no longer have to try to pull data from multiple systems with different methodologies. As a result, they can track cost of service the way they choose.

Time Savings - Streamlining parts orders alone has given DCG major staff time savings. The company estimates they're now saving 15 minutes per each part order, which equates to about 150 hours a year over the old e-mail-based system.

Reduced Response Time - With the systems information subject to automation and escalation, response to machine downtime has dramatically improved. And permission-based escalation ensures that the right business managers are notified when a case remains open too long. The result is that cases are resolved in a more timely fashion.

Phone Calls Reduced - For part orders, users can now go to EnterpriseWizard to see their order status. Customers also get an e-mail when their parts order has shipped. Because of this, DCG gets fewer calls from customers about part orders.

Contract Renewals Improved - With EnterpriseWizard's reminders, expiring support contracts never go unnoticed. Instead, sales reps are notified with plenty of time to get the contract renewed and paid in a timely manner.

Overall Efficiency - With EnterpriseWizard, all of DCG's processes have become more efficient. Nothing falls through the cracks because everything is recorded in the system. Users and customers have access to all the information they need. And that has helped to keep the operation humming along.

"EW support staff have bent over backwards to help us solve problems, even when we caused them ourselves!"

—Brian Pollock, North America East Service Manager

For More Information

Call 1-888-727-2209 ext 1 to learn more about improving your support or service offerings with better business process automation.

About EnterpriseWizard

EnterpriseWizard, Inc. (www.EnterpriseWizard.com) is the leading provider of powerful, easy-to-deploy, and cost-effective Web-based software solutions for business process automation, customer support and service desk, and CRM for organizations with complex products or services. It has attracted hundreds of customers, ranging from startups to leading edge companies such as Chevron, NEC and Emerson Electric.

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