SERVICE RELATIONSHIP MANAGEMENT (SRM)

A Strategic Approach To Commercial Asset Maintenance

Decisiv™

Contents

Introduction

The service and repair process for commercial assets is antiquated and negatively impacting uptime, profitability, and operational efficiencies. The supporting technology and communication processes have not changed much in more than 20 years.

Recently, the tsunami of connected asset data has renewed awareness and interest in improving asset performance and availability. But this flood of data has done little to solve service process challenges.

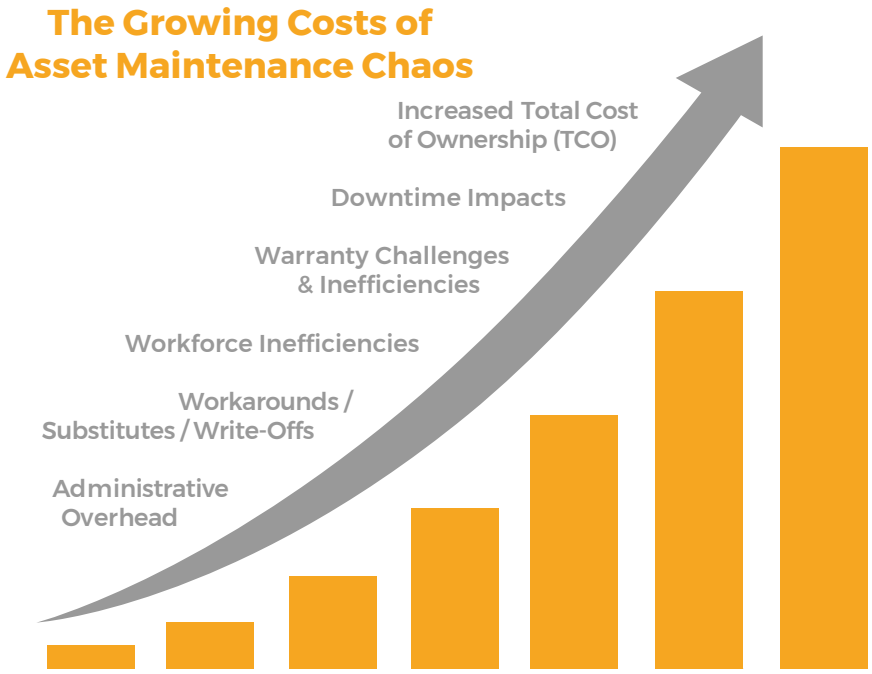
Service Relationship Management (SRM) was created to address these shortcomings. SRM ushers in a dramatic improvement in the service management process that elevates customer-provider relationships, enhances asset utilization, extends asset life, and reduces operating costs.

- SRM applies to any commercial, industrial or manufacturing asset, component or equipment.
- SRM supports the service process at any location.
- SRM transforms internal and external team (the service value chain) interactions into a strategic, competitive differentiator.

This whitepaper provides insights into why SRM should be an important part of your service event management value equation.

Why Should SRM Be Important to You?

For those companies who are satisfied with their existing service approach, SRM is likely not going to be of interest. If, however, improved service management for commercial assets can be a key to creating a sustainable competitive advantage—read on.



Few enterprises take the time to truly understand the root causes and real impacts of poor service management. However, the overlooked costs of poor asset maintenance practices have real and direct negative impacts on uptime, employee effectiveness, and bottom line results.

If you have experienced any of the conditions below, you might greatly benefit from learning more about how SRM can be a transformational force in your business.

- Do process bottlenecks lengthen the time to return assets to service?
- Are you looking for new ways to improve asset availability?
- Does your current service delivery process lack consistency and measurability?
- Does it take way too many phone calls and emails to work through service issues?
- Are you constantly fighting fires and stressing out because you lack service visibility?
- Are comebacks and repeat repairs higher than they should be?
- Are you still manually entering data from paper forms, invoices, and faxes?
- Does lack of information at the point of service impact your decision making?
- Is your lack of financial controls driving up maintenance costs?

To effectively and systematically address these concerns, a SRM platform might just be for you.

What is SRM?

Unlike Customer Relationship Management (CRM), SRM may not be a familiar term. SRM is a methodology designed to eliminate the communication white space and effectively manage the information chaos in today's service processes.

SRM is a strategic business approach that optimizes service value chain efficiency to improve decision making, reduce costs, ensure service event consistency, and maximize asset availability. SRM unifies the management of service events by enabling rich, role-based user experiences that combine in-context access to required information, real-time communication and collaboration, business intelligence tools, and integrated diagnostics, often referred to as the Industrial Internet of Things (IIoT).

xRM	Approach	Value Focus	Feature Focus
SRM	...approach to managing and collaborating on service events across all service value chain participants...	...to improve decision making, reduce costs, and maximize asset availability, while ensuring service consistency	...by enabling in-context access to required information, real-time communication and collaboration, and business intelligence tools
CRM	...approach to managing and analyzing multi-channel interactions with current and potential future customers...	...to maximize business efficiency and profitability as well as customer lifetime value	...by automating sales, marketing, and customer support

SRM Transforms the Service Value Chain

Earlier in this paper, the service value chain was defined as the internal and external participants who engage in the service management process. More broadly, the service value chain is the set of business entities and information (as well as the parts, fluids and other required service elements) required in the service and repair of commercial assets.

The concept of industry specific value chains has been around since the 1980s. However, the importance of optimizing the service value chain for commercial assets is only now beginning to emerge.

Recently at a conference, an audience member suggested that parts availability and the potential impact of 3D parts printing is the most critical part of the service value chain. While this is a fascinating opportunity, the reality is that for the vast majority of service events, parts availability is not the key time-limiting factor.

The service value chain for commercial asset service management is a complex and dynamic web of connected assets, data, people, technology, and processes across multiple business entities. Each business entity may then have one or more applications providing information or requiring information around service events.

An SRM approach delivers ***the right data***, at ***the right time***, shared with ***the right people***, in-context of the specific asset and the specific problem. This unique multi-relationship information sharing and collaboration transforms the service value chain into a competitive differentiator.

SRM = Web 3.0 and Asset Maintenance

Service Relationship Management is designed to address the complex nature of the service value chain. To accomplish this, it leverages the latest software and cloud technologies.

Some technology pundits refer to the current generation of software as the fourth industrial revolution ("a range of new technologies that are fusing the physical, digital and biological worlds, impacting all disciplines, economies and industries") or Web 3.0 ("...connective intelligence; connecting data, concepts, applications and ultimately people).

In Steve Case's book, *The Third Wave: An Entrepreneur's Vision of the Future*, he explains how the first wave of the Internet was building the infrastructure; the second wave was building applications and software; and the third is focused on bringing new levels of productivity and efficiency to longstanding industries, such as commercial and industrial asset management.

No matter what you call it, SRM is here today—providing new levels of ***connectivity*** to the service value chain to enable real-time ***communication*** and collaboration, and putting ***controls*** and notifications in place to ensure service event management ***consistency***.

CONNECTIVITY	COMMUNICATION	CONTROL	CONSISTENCY
Facilitates seamless data flow between assets, service points, OEMs, and fleets	Enables contextual information sharing and collaboration at the point of service	Provides tools to reduce risk, increase efficiency, and improve decision-making	Ensures reliable access to real-time service event & post-event reporting data

SRM Focuses on Doing—Not Just Knowing

Connected vehicles utilize what is traditionally known as telematics or more recently the Industrial Internet of Things (IIoT). Telematics, likely the original use case for IIoT, has been in the transportation world since the 1980s to monitor and manage driver behavior and optimize routing.

Leveraging the wireless connectivity of existing telematics solutions, the latest connected asset technologies have improved access to engine and other computerized asset components. Asset health and performance data is stockpiling at an exponentially increasing rate.

Machine learning and artificial intelligence (AI) tools are also being enhanced to aggregate, analyze, and prioritize this information and to predict potential failures.

However, knowing that something is broken or going to break does not ensure effective service management or increased uptime.

A television commercial from LifeLock provides a great juxtaposition in the value difference between "doing vs. knowing." The ad instructs the audience about the value of actually doing something rather than just knowing about a problem—***"Why monitor a problem if you don't fix it?"***

While the subject matter is not applicable to SRM, the message holds true—it is much more important to ensure an effective outcome and deliver real value than to just know that something is wrong (or about to be wrong).

In terms of asset service management, remote diagnostic events highlight this case and point. High severity failures typically trigger a series of phone calls, emails, paper shuffling, and other coordination efforts to try to find the people and information necessary to actually repair an asset. The process is further hampered by the reliance on siloed legacy solutions, single-purpose applications, or stand-alone "health portals" that are not directly and seamlessly integrated into the repair process.

The result: remote diagnostic information is an enhancement to, but not an enabler of effective service event management. In order to make a positive impact on service management, diagnostic information (and other information from service value chain participants) needs to be actionable and integrated into the repair process.

SRM Supports Any Commercial, Industrial or Manufacturing Asset

It turns out that effective service event management across asset types and industries—not only in North America but also around the world—involves the same basic building blocks:

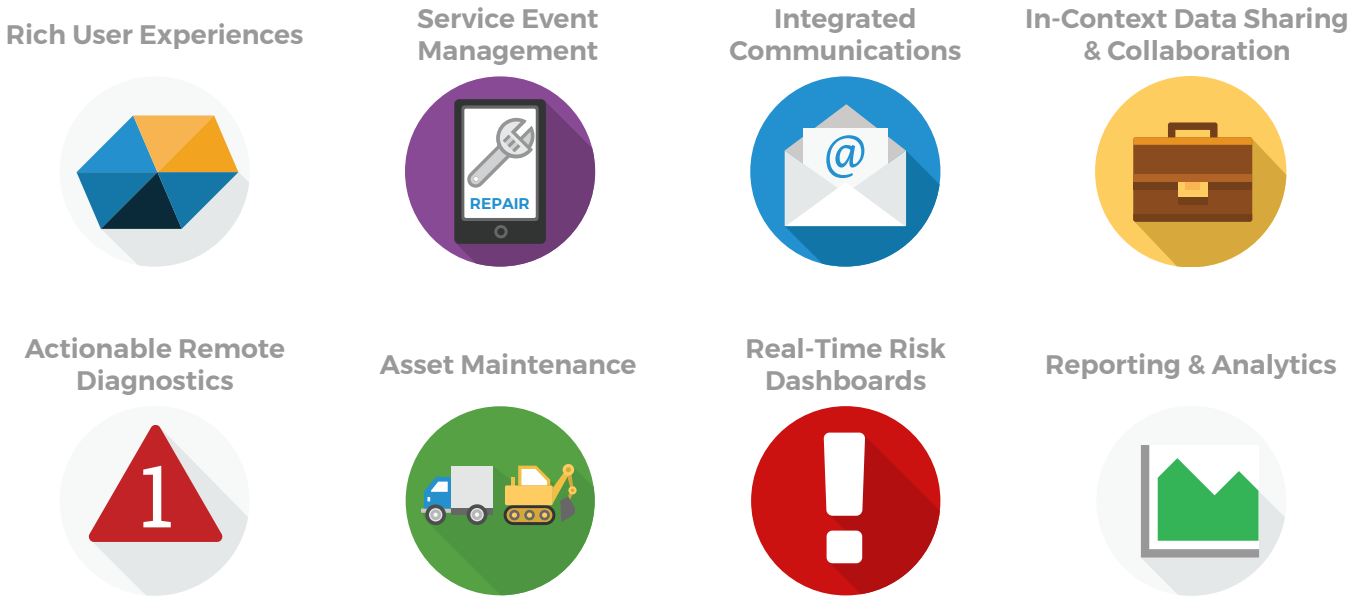
- Proactive engagement of the participants in the service value chain
- Diagnostic information (remote and shop tools) and other in-context asset information from multiple sources at the point of service
- Ability to communicate and collaborate in real-time based on roles and relationships
- Business intelligence tools to ensure real-time risk mitigation and trend analysis for process improvement

In this recent article in the Harvard Business Review, AI Won't Change Companies Without Great UX, Michael Schrage says, "Business process redesign and better training are important, but better use cases—those real-world tasks and interactions that determine everyday business outcomes—offer the biggest payoffs."

In the asset service world, it is precisely these "use cases" that benefit from an SRM approach. In these cases, valuable outcomes are the result of delivering and taking action using the right data, at the right time, shared with the right people, in the right user experience, in-context of the specific asset and the specific problem.

The Decisiv SRM Platform

The Decisiv SRM platform takes the core building blocks described above and assembles them into a cloud-based solution that can deliver highly personalized, rich user experiences based on each participant's role in the service value chain.



This Decisiv software platform enables customers to quickly leverage the entire computing stack—no software to manage, no servers to deploy and with little or no technical acumen or IT support (other than complex integrations and security requirements).

The integration framework and APIs make even these complex integrations time and cost effective. To further facilitate and create additional service supply chain value, Decisiv has partnered with a growing number of technology companies that leverage the platform's integration framework. The Decisiv Network Alliance is a growing ecosystem of ***technology*** (e.g. Diagnostics/ Telematics), ***application*** (e.g. Dealer Management and Asset Maintenance), and ***content*** partners, including pre-built integrations for more than 30 partners representing more than 700 existing application integrations.

The platform is available directly from Decisiv or through one of its partners. The user experiences can be branded and configured by partners and customers to support their respective requirements. The platform is currently being used by tens of thousands of users at fleets, independent service providers, dealers, and leasing and rental companies. It is also the foundation for service event management at leading vehicle manufacturers and service networks throughout North America and rental companies. It is also the foundation for service event management for the service value chain at leading vehicle manufacturers and service networks throughout North America.

The Decisiv platform unifies all service events, no matter where the service is performed, into a singular view for any asset type from any manufacturers by combining the following features into a standard process framework, including:

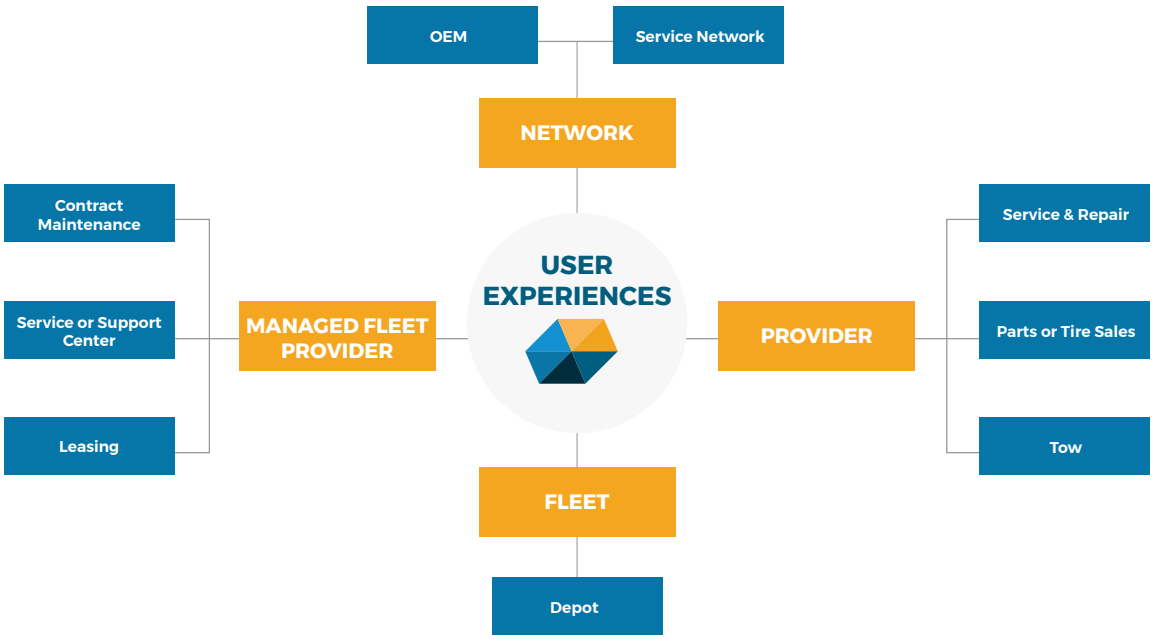
- Rich user experiences
- Service event management
- Integrated communications
- In-context data sharing & collaboration
- Actionable remote diagnostics
- Asset maintenance
- Real-time risk dashboards
- Reporting and analytics

Rich User Experiences

User experiences are based on the service value chain participants and their roles. The number and types of user entities participating in a service event will vary. It depends on the type of asset, the asset ownership status (rental, lease, etc.), any contractual relationships (warranty, contract maintenance, etc.), and the physical location of the assets.

For example, during an on-highway breakdown event, a tow provider may be required at the beginning while OEM technical support may be required later in the event. Role-based user experiences maximize the productivity of each user through efficient applications interactions.

Non-platform subscribers can access a service event through a single use, guest portal. The Decisiv API also allows existing third party applications (call centers, technical support, parts expediting, etc.) to participate in service events and communicate with users using their existing applications.



Service Event Management

Employing an open API-based approach enables the Decisiv platform to become a single point of management and control for complete service event visibility, transparency, and accountability.

Manage breakdowns, tows, scheduled maintenance, mobile and internal repairs in a centrally-managed, electronic, closed-loop system including:

- Managing, tracking, and reporting of:
  - Service requests, repair statuses, reasons for delay
- Estimate creation, management, and line-item approvals
- Estimated and actual repair times

The platform exposes a suite of action services that can automate many otherwise manual tasks based on specific application triggers or user experience actions (sometimes called Quick Action Buttons). This helps standardize processes and usage compliance by tying together one or more application-related actions such as sending notes, updating status, assigning a user to the event, populating fields with specified data, setting customized follow-up times, and other actions.

Integrated Communications

The platform enables event participants to communicate via a simple notes paradigm. This allows users to consolidate all service event communications and notifications. Notes are captured as part of each event but can also be sent via email or text depending on the user's preferences. Email replies to these notes are automatically added back into the context of the event. Notes can be shared both publicly and privately (within or across user entities). All notes, activities, and approvals are logged to ensure transparency for all events.

In-Context Data Sharing & Collaboration

At the point of service, the SRM platform aggregates the required in-context data. It leverages the platform's APIs and integration framework to capture information from one or more applications from the participating business entities. Enabling in-context access to this information significantly improves the productivity and efficiency of the entire event. It also enables data sharing between systems during the event to eliminate manual data entry.

Access to the information is governed by the business entity, the role of the user and contractual relationships (including data sharing agreements) between the parties.

POINT OF SERVICE INFORMATION

OEM	FLEET & ASSET	CONTRACTS & SUBSCRIPTIONS	DIAGNOSTICS	DEALER & PROVIDER
• Build Details • Warranty Status • Recalls & Service Bulletins • Parts Catalogs	• Service History • Pending Operations • Maintenance Status • Inspections & Labor Operations • Driver/Operator • Profile & Preferences	• National Account Pricing • Lease & Rental Terms • Contract Maintenance	• Remote Resources • Shop Tools • Inspections • Fluid Analysis • Geo-Fence (arrival & departure)	• Estimates & Invoices (business systems integration) • Customer Pricing • Parts Availability • Hours of Service & Services Offered • Technician Status & Location

Actionable Remote Diagnostics

The Decisiv platform captures information from any remote diagnostics technology and shop tool directly into the service process, eliminating calls, emails, and other non-productive time. This information includes:

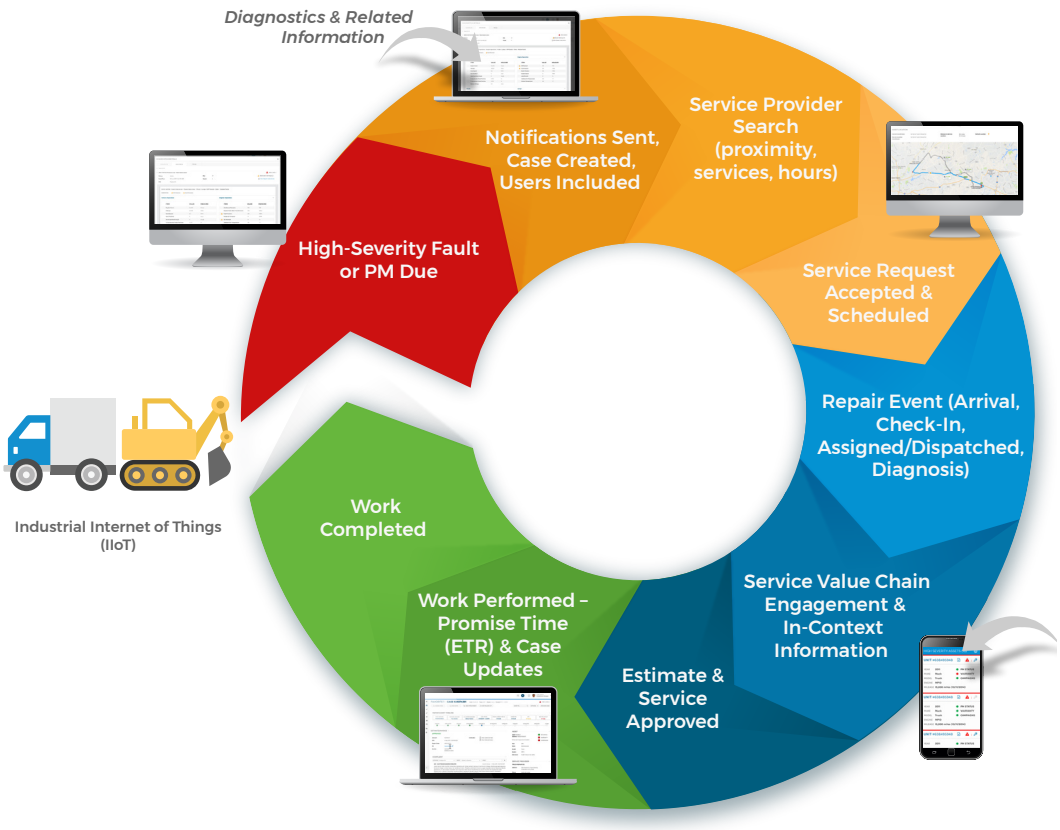
- Diagnostic fault codes (DTC) or other system failures or alarms from asset, engine, or component electronic control units (ECUs) as well as fluid, pressure, temperature, and other sensors
- Fault codes and other system failures can be categorized by severity level using a color, a number, and a "friendly name" or alias (e.g. Stop Now)
- Snapshot data on operational performance as well as fluid, pressure, and battery levels

The platform also allows users to prescribe a variety of actions based on event severity and diagnostics source. The most basic actions include the automated creation of a service event and the notification of desired participants. These actions can be bundled with other specific information to further automate the process, including:

- Recommended repair or triage plans via PDF, URL, or external application
- VMRS-coded labor operations, including parts (which can automatically be added to work orders)

The platform API also enables the capture of geo-fence triggers for arrival and departure information. These triggers leverage the platform to automatically capture the time and date, change the repair status, and send a note to designated users.

Integrating diagnostic information directly into a standard process flow—along with the other required information—has proven to reduce triage more than 70%, lower downtime more than 25%, and improve "fixing it right the first time" by more than 90%.



Asset Maintenance

The Decisiv platform enables rapid integration and synchronization with leading shop and dealer business systems as well as fleet maintenance and asset management applications. It provides a seamless process for capturing and sharing service event details, estimates, purchase orders, and invoices.

The platform also provides visibility to lease, rental, and other contract details at the point of service. It can serve as the system of record for managing scheduled maintenance and even leverage telematics to trigger maintenance alerts or obtain status from existing applications. Frictionless data sharing between applications improves productivity, reduces administrative overhead, and ensures maintenance and process compliance.

Real-Time Risk Dashboards

Users are immediately notified based on preferences when a service event or asset meets specific criteria. Dashboards automatically help prioritize and focus resources on the service events and assets that require immediate attention. This ensures consistency across a service network or fleet while also improving the data quality for post-event analysis.

Thresholds can be simple such as “Estimates > $10,000”, “Repairs are past their promise time / overdue (ETR)” or “Assets with over-due maintenance”. Dashboard criteria can also be grouped using logic and boolean operators such as “Assets that have been out of service for more than three days *AND* a technician has not yet started work” or “Service events with high severity faults *AND* Odometer < 10,000 *AND* No event updates in the last two hours.”

Each user experience comes with a reference set of dashboards. Administrators can also update, create, and publish role-specific custom dashboards.

Reporting & Analytics

The Decisiv platform takes advantage of the latest visualization and data warehouse technologies to provide users with post-event analytics to drive accountability and process improvement, and to improve decision making.

Each user experience also comes with a standard set of reports, which include email-based subscriptions delivered based on user preferences. Customized reports are also available. Standard reports focus on aspects of the event data that are typically not available through existing systems. This includes detailed asset downtime, provider/shop/technician performance, and service event process compliance. Recognizing that many users have existing reporting tools, event data is also exportable (API/FTP).

Decisiv extensively utilizes the Vehicle Maintenance Reporting Standards (VMRS)—a standard set of codes licensed and managed by the Technology & Maintenance Council of American Trucking Associations. While the name implies that VMRS is solely for vehicles, the reporting code structure lends itself to any type of commercial asset. Recent white papers on this topic Using VMRS Codes to Unlock Fleet Profitability and VMRS at the Next Level provide valuable background on how VMRS improves reporting quality and decision making based on a number of key attributes including:

- Asset type and configuration
- Reason for repair
- Repair status and reasons for delay
- Complaint, cause, and correction
- System, assembly, and part
- Labor and maintenance operations

Service Value Chain Benefits

With SRM, each service value chain participant benefits from improved service event management. The exact value is dependent on the industry, the specific business entity and their respective metrics for success. The table below provides a high-level overview of the types of value that key participants can achieve from implementing an SRM platform:

SERVICE VALUE CHAIN PARTICIPANT	BENEFITS
OEMs	• Leverages real-time event visibility, improved information access, and integrated communications to drive uptime and ensure consistent network-wide service delivery. • Improves internal communications as well as engagement with technical and field support resources to create and strengthen end-customer relationships. • Enables real-time support and warranty policy decisions to reduce costs, lower goodwill write-offs, and improve process efficiencies.
Dealers & Service Providers	• Drives shop efficiency, productivity, and profitability as well as significantly improves customer satisfaction by adding a layer of communication and estimate management to internal business systems. • Enables measurement of service advisor effectiveness (sales, downtime, compliance). • Improves shop and technician communications and efficiency to deliver higher effective labor utilization and revenue.
Lessors & Contract Maintenance Providers	• Enhances communication and automates remote or external work order information capture to maximize gross margin and improve customer satisfaction. • Enables process consistency across service locations and support for reciprocal service agreements. • Eliminates manual data entry, reduces phone calls and ensures lower administrative overhead. • Improves service and maintenance management to reduce substitutes and rental asset costs and improve re-marketing values.
Fleets & Enterprises	• Improves communication, management, visibility, and transparency of internal and external service events to drive uptime. • Enables rapid integration and synchronization with leading fleet maintenance and asset management applications to reduce costs and improve data quality for reporting. • Integrates third party portals and diagnostic services to provide a universal view into all service events and assets. • Enables new levels of financial oversight and eliminates invoice-estimate mismatches.

The Decisiv website has case studies on each type of user experience if you need additional information.

Conclusion

The pervasive benefits of transforming service and repair processes can no longer be ignored. It's time for you to join the revolution.

Independent of industry, asset type, and service location, SRM can help lead a dramatic improvement in service management process that elevates customer-provider relationships, enhances asset utilization, extends asset life, and reduces operating costs.

To learn more, contact solutions@decisiv.com.

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