

# Charket Field Service Case Study

## 1. Client Background

The client is a global medical equipment company that develops and manufactures surgical devices and related pharmaceutical products.

## 2. Challenges & Opportunities

ServiceMax, an application built with and running on top of the Salesforce force.com platform, is widely used by this global company to manage repair and on-site service of their equipments. Customers of the company had previously made repair and service appointments by calling the company's contact center where service agents created cases and assigned them to service engineers according to the customer and equipment data maintained in ServiceMax. This process introduced the following issues and challenges:



Customers had to wait for long time when the contact center was busy. The customer satisfaction was compromised.



There were often times a gap between what a customer described over the phone and what the issue really was happened due to limitation with telephone communication. Such gap delayed the issue resolution process and could potentially upset the customer.



The communication between customers and service engineers suffered from the same telephone communication limitation that service engineers could not obtain the most accurate information before going onsite.



Going from one customer to another did not leave service engineers much time to open their computers and update case status. Customers did not receive timely status update, had hard time reaching out to service engineers, and could not submit their feedback regarding their experience with services received.



The contact center operating cost for equipments, telephone services, rent and salaries was getting higher.

The client started looking for a new solution that can improve the satisfaction of their customers in China and at the same time, bring the operating cost on customer support down. The new solution needed to meet the following requirements.



Customers can submit their repair and service requests at any time by scanning equipment QR codes with WeChat and if needed, upload pictures and video clips through WeChat as well.



QR codes have customer and equipment data maintained in ServiceMax.



Cases are saved directly to Salesforce and assigned to service engineers automatically based on ServiceMax data.



Service engineers and service agents can update case status from their mobile devices and real-time updates are pushed to customers' WeChat.



Cases, if not attended by service engineers within the timeframe defined in SLA, need to be escalated and reassigned.



Customers can communicate directly with service engineers through WeChat.



Customers can use WeChat to provide their feedback on customer service experience by submitting surveys.



Management teams can run Salesforce reports and dashboards to monitor case processing status and engineer resource utilization.

### 3. Solutions

As a one-stop WeChat solution, Charket's service offering meets all their customer support requirements. By connecting their WeChat into their Salesforce and leveraging data available from ServiceMax, Charket helped the client implement a highly automated customer support process that covers case creation using WeChat, case auto assignment, WeChat based communication and resource sharing, and feedback collection through WeChat.



#### WeChat Customers

Log cases by scanning QR codes and stay informed of status updates through WeChat. Simplified process enhances customer experience.



#### Service Engineers

View customer data and process cases using the Charket mobile app. Use Live Chat to receive pictures & audio/video clips from customers and share with them solution articles and how-to videos. Advanced mobile technologies help troubleshoot issues.



#### Service Manager

Gains insight into case processing, engineer performance and customer satisfaction through real-time data reporting. Increased efficiency cuts costs.

### 4. Charket Competitive Advantages



#### Data Analytics

All data generated throughout the entire service process is stored in Salesforce. Salesforce reporting tools and 3rd party data mining tools, such as Tableau, offer the flexibility to report against and analyze such data.



#### Data Security

Charket connects WeChat right into Salesforce without having any servers in between to ensure the highest level of data security, the best performance and the most reliable connectivity.



#### Cost Reduction

Charket is committed to reducing business costs and increasing user experience by automating business processes and redistributing workload.



#### Customer Success Support

Charket's customer success team offers on-going support and technical expertise to help each customer succeed.

Want to know more about Charket? Follow Charket by scanning the QR code on the right and chat with our technical experts.

