

 CASE STUDY

Automating Service Processes Enables Company Growth



CUSTOMER QUICK FACTS

INDUSTRY:

Residential Services

SIZE:

7 employees total/
5 employees using ServiceMax

HEADQUARTERS:

Mount Pleasant, South Carolina

WEBSITE:

[http:// www.nautilusco.com](http://www.nautilusco.com)

SERVICEMAX SOLUTIONS

- ServiceMax Suite for Small Businesses
- ServiceMax Mobile for iPad
- MaxCare Standard Support

Nautilus Company provides residents of South Carolina with impeccable custom home building services as well as home management and preventive maintenance programs. They loved using Salesforce to help manage their customer relationships. However, they realized that they still needed help managing Work Orders and complex Preventative Maintenance contracts, which led to their search for a system that was specifically built for Field Service.

The pivotal moment came when ...

- CRM workarounds led to energy being spent on IT instead of growing revenue

Applying technology led to...

- Formerly complicated preventative maintenance processes now made simple through an automated system
- Territory analysis led to restructuring teams to increase productivity
- Ability to track 10,000 pieces of data
- Better communication with clients through custom reports

The road to success is delivering...

Invoices in 2 hours rather than one week

Improved technician productivity

Increased Customer Satisfaction

CHALLENGE

Nautilus Company needed a tool to help run their small business more efficiently. They used Salesforce, which worked seamlessly to manage and track their customer data, but still needed help dealing with Work Orders and complex Preventative Maintenance contracts. Nautilus Company tried to build out their CRM's capabilities for field service, however this workaround succeeded for only a short amount of time. As they grew, Nautilus Company didn't have the resources to make their software scalable and focus on their growing business at the same time.

SOLUTION

As they continued to run into difficulties, Nautilus Company decided to use ServiceMax for Small Businesses. ServiceMax automatically generates Work Orders for upcoming Preventative Maintenance contracts. The Work Order pops up two weeks beforehand, and Nautilus Company simply looks at the calendar and decides when to dispatch technicians to the field. Adding to this efficiency, technicians are now using ServiceMax Mobile for iPad with picklists, saving time and ensuring accurate data.

Nautilus Company used a phased implementation approach, starting with their core business process. After 3 months, they are already thinking about what's next to add to ServiceMax, such as integrating with QuickBooks.

"I was really impressed with how ServiceMax handled the implementation process. They laid everything out that we needed to complete the project. After 2 months, we were up and running."

Denise Carpentier,
Special Projects Manager at Nautilus Company

RESULTS

ServiceMax helped Nautilus Company to improve their technician productivity. They went from missing 3-4 inspections per month to now missing ZERO inspections thanks to the dispatch console keeping track of what work orders need to get scheduled.

ServiceMax's dispatch console also helped to improve productivity through increased visibility. "Previously, we had all of our technicians servicing one large area. By using ServiceMax, we realized that by splitting up our technicians by geographic regions we would greatly improve our productivity, and save us time and money on gasoline," said Bill Payzant, Founder & Owner of Nautilus Company.

"The most important factor for me was accountability. We have service contracts in place with our customers that involve many small details. The beauty of ServiceMax is that we can put those contracts straight into the program and Work Orders are automatically generated and we know about them ahead of time to schedule. Nothing gets overlooked now."

Bill Payzant,
Founder & Owner of Nautilus Company

Nautilus Company loves having access to so many reports. If there isn't an out of the box report, they can simply create their own. According to Denise Carpentier, Special Projects Manager at Nautilus Company, "With ServiceMax, we generate custom reports letting our customers know the exact work that was performed on their house. This ensures there are no surprises with an invoice and allows our customers to see the value they get using Nautilus Company." Nautilus Company also uses reports such as Past Due Work Orders to make sure nothing slips through the cracks. This increased visibility has greatly improved customer satisfaction.