Daikin Australia, an HVAC services company, was drowning in paperwork; they knew that productivity and cash flow were impacted by their cumbersome service management process. “Prior to ServiceMax our technicians did everything manually—calling in RMAs, placing parts orders, and closing out service calls,” said Steven Seretis, Service Operations Manager for Daikin. “We looked at eight different service management solutions. ServiceMax won our business because they had the technology to empower our technicians, eliminate paperwork, and reduce the invoicing cycle.”

The pivotal moment came when:

- Manual handling of paperwork, including creation of work orders, scheduling, and invoicing, became burdensome for the organization
- Invoicing took an unacceptable three months, hurting cash flow and field service KPIs
- Service technicians were underutilized and depended excessively on service coordinators

Applying technology led to:

- ServiceMax Mobile empowered their technicians to take charge of the service experience with easy access to customer and product information on their mobile devices
- Customizable reports and dashboards gave everyone, from management to service technicians, a 360 degree view of service operations

The road to success is delivering:

**Service orders closed on-site by the technician, versus the three days it took before**

**Improved cash flow through next-day generation of invoices**

**Self-sufficient technicians, who were able to order parts and create RMAs without calling a service coordinator**
RESULTS

Seretis has seen significant improvements in field efficiencies since adopting ServiceMax. “Our technicians can now close orders while on-site with the customer. This used to take up to three days to complete—so long that technicians sometimes forgot what repairs they did. Now, we can invoice the next day, and accurately too.”

Empowering their technicians has reduced the demands placed on Daikin service coordinators. “Our technicians used to call service coordinators for things like updating work orders, ordering parts, and creating RMAs,” said Seretis. With ServiceMax Mobile for iPad, Daikin technicians are able to efficiently complete such tasks without assistance. Service coordinators can see when a work order has been closed in real-time, allowing for more efficient scheduling of technicians.

Seretis is putting ServiceMax’s comprehensive reports and dashboards to good use. “We can see how the field service division is doing at the click of a mouse. The standard reports are a great management tool, and I can make my own reports too.” With ServiceMax business intelligence, Seretis can easily show upper management that he’s doing his job well.

“ServiceMax Mobile for iPad is a great tool for our business,” concluded Seretis. “We did a regional rollout to each branch and assigned a champion to spearhead adoption. Almost all of our service technicians were excited about the new tools. New-found efficiencies are showing up throughout the business. That’s just what Daikin need to overcome its challenges and continue to thrive.”

CHALLENGE

Daikin Australia, a subsidiary of Daikin Global, has been providing HVAC solutions to residential, commercial, and community projects for over 40 years. The company sells its equipment through resellers and has a service team that does both warranty and on-demand repair work. “Our field service team is comprised of 40 technicians and 20 apprentices,” noted Seretis. “We also have 14 coordinators and managers who run the business. On average, we complete 160 jobs a day—that generates a lot of paperwork.”

As the company grew, their paperwork problem became more and more obvious. “There were literally piles of paperwork building up on the desks of our accounting staff. This rapidly became unmanageable. Customers were receiving invoices three months after the service date, hammering the field service division’s revenue key performance indicators (KPIs).”

The need for new technology was clear to Seretis. “We had to streamline the service delivery process, eliminate paperwork, and reduce the technician dependency on service coordinators. We knew accomplishing these goals would allow us to bill more quickly, take on more service calls, finish work faster, and reduce the overall cost of providing service. “Furthermore, Seretis had to keep his eye on key metrics. “There are three important metrics in the field service business. On-time service delivery is crucial to customer satisfaction and repeat business. Time to invoicing is also very important, as it significantly impacts cash flow. And, of course, our team has to hit our monthly revenue targets.”

SOLUTION

Daikin Australia chose ServiceMax after a rigorous evaluation of multiple field service technology vendors. “We looked at eight different systems,” shared Seretis. “Our evaluation focused on performance, connectivity, and the configuration needed to make it work.” Seretis and his team quickly narrowed it down to five choices, and selected ServiceMax after receiving presentations from the remaining companies.

Daikin partnered with a Gold Level Salesforce.com Consulting Partner, to implement ServiceMax. “Our technology infrastructure is very complex.” Seretis added. “We’re running SAP for our ERP and CRM needs. All things considered, it was an easy decision to go with ServiceMax instead of spending money to upgrade SAP.”

The ServiceMax mobility products were a big plus for Seretis. “Our technicians are on the road all day— it’s essential that they have good mobile tools.” With ServiceMax, Daikin technicians now have immediate access to critical service information and customer information wherever they are.