



## CASE STUDY

Failed installations due to incompatible equipment onsite. Solved with SFDC Flow.

### OVERVIEW

A company needed a way to prevent failed installations due to the sale of incompatible equipment to semi-conductor customers, such as Samsung and TSMC (Taiwan Semiconductor Manufacturing Company).

Initially, the company wanted to implement a simple pdf attachment in SFDC opportunities as a potential solution to the problem.

Failed installations lead to issues with account receivables due to contract terms. The often incompatible product was built into all other bundled products that were universally compatible.

Any piece of equipment failing installation led to delayed payment of 50% for all equipment on the purchase order, customer angst, and required diverting resources from ongoing research and development to resolve the issue.

### SOLUTIONS

Through targeted discovery, it was determined that understanding the customer ecosystems can help direct research and development efforts to increase the addressable market as well as increase service efficiencies.

An auto launched flow was implemented whenever an opportunity transitioned into the "Qualification" stage with a compatibility questionnaire.

The information from the SFDC FLOW was fed into a site object that:

- created a searchable, reportable database on the customer ecosystem
- was run against a revision controlled compatibility checklist
- Provided instant feedback on-site compatibility

### AT A GLANCE

#### Challenges

- Failed Installations due to the sale of incompatible equipment
- The sale of multiple products on a single PO led to payment holdback for the complete PO
- Incompatible product was built into all bundled products
- Contract terms dictated 50% payment on acceptance
- No visibility into customer ecosystem

#### Benefits

- Installation failures reduction
- Positive financial impact
- Product Management Roadmap

### BENEFITS

#### Customer Service

This guide will lead trainers through project proposal writing sessions and exercises.

#### Financial Impact

Moving captured data from PDF to a searchable database(SFDC object) led to an immediate decrease in installation failures from 69% to 25% due to site prep, and the recognition of >1 million dollars in deferred revenue.

#### Product Management Roadmap

Understanding the customer eco-system helped prioritize development based on the addressable market versus fire fighting.



## CASE STUDY

Logistical issue delivering software updates, and consumable calibration files. Solved with SFDC Experience Cloud.

### OVERVIEW

A company had traditionally integrated a laptop with a CD/DVD player to facilitate the delivery of equipment service software updates and consumable calibration files.

The company was faced with constant sunsetting of laptop models that had integrated CD/DVD players, leading to supply chain issues that inhibited software delivery, installation, and repair of new and existing units.

Internet accessibility of the installed equipment was less than <5%, with government, military, and company imposed regulations preventing "always-on" internet connectivity.

The customer was initially only looking for help with the service delivery side of the problem.

### SOLUTIONS

Through the discovery process it was determined automated means of software update would be possible, but would only resolve the software delivery issues for <5% of the installed customer base.

Through target customer interviews and internal company discovery, it was determined that an SFDC Experience cloud customer service portal deployment would leverage existing systems and information to provide customer-specific and relevant information such as:

- Provide customer-specific "calibration file" visibility via a tie-in between Netsuite ERP, Dell Boomi, and legacy customer-developed calibration file database
- Customer-specific software updates
- Visibility into software downloads and training completion

### AT A GLANCE

#### Challenges

- Traditional CD service delivery method was becoming increasingly difficult
- Equipment internet accessibility was almost non-existent at <5%.
- Efforts to increase equipment internet connectivity were costly
- Software update activation required custom-specific keys only stored in Netsuite ERP system

#### Benefits

- Prevented implementation of a costly solution that would have addressed <5% of the targeted audience
- Shipping and handling costs eliminated
- Provided platform that could be leveraged at later date for self-service and multi-channel support

### BENEFITS

#### Right sized solution

"My account portal" allowed customers access to required files instantly, versus having to wait days/weeks for files to arrive due to shipping, customs, and lost packages.

#### Customer Success

The customer was able to utilize laboratory-mandated means of file transfer and file scanning. Additional perks were automatic notification, required training assignment, and historical access to calibration files.

#### Foundation for further growth

The customer wanted to deploy a customer-facing knowledgebase at later date, all of the mechanisms and foundational elements built can quickly be leveraged for knowledge base activation.