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Industrial Manufacturing Industry

# INTRALOX

A CASE STUDY BY JOLT CONSULTING GROUP



# INTRALOX | SERVICE/JOLT ASSESSMENT | SALES CLOUD & FIELD SERVICE LIGHTNING IMPLEMENTATION



Intralox, LLC is a global provider of conveying solutions that create significant economic value for their customers in more than 40 countries. Intralox has become a world leader by consistently delivering where it matters most: Service, Technology, Accountability, and Results. Intralox kicked off a new, critical project for their company in 2019, the PSS. This project will transform their service operations and the experience Intralox's customers receive when engaging with Intralox. The PSS project scope is based around the implementation of the Salesforce Service Cloud and Field Service Lightning (FSL) products.

## Business Challenges

- Intralox did not have visibility of day-to-day activities across the service organization/departments due to the use of several disparate IT systems and siloed departments within the service organization, hindering ability for strategic decision-making
- Communication was not clear among the field techs, back office and customers, especially pertaining to Work Orders/Service Appointments, along with details around the installed assets and parts consumption; no easy way to keep track of product warranties and third-party parts
- Service request creation and dispatching was a very manual and cumbersome process; tech selection based on tribal knowledge (skill and prior knowledge not considered); low service coordinator to technician ratio (1:7); missing checklists and forms to streamline gathering of critical customer and asset information for processing, including part information; error-prone invoicing and billing systems post-visit

## Our Solution

- Complete redesign of service business processes per Jolt Consulting Group's best-in-class recommendations.
- Unify all internal users on a common platform (Service Cloud, Field Service Lightning) to view all external (customer) and internal support issues.
- Agile integration solution to meet the digital business requirements and deliver integration at a fast pace; performed integrations with 2 systems - Microsoft Dynamics & Oracle via Dell Boomi middleware
- A strong focus on the equipment (EAS/EFS) business segments to include a shift towards an uptime centric orientation leading to offering more value-added services to customers (i.e. helping the customer maximize the use of their asset) v. simply servicing them (i.e. they called and it's broken, so I'll fix it.)

## Our Results

- Internal resource budget has been reduced due to a higher ratio of service coordinators to field technicians, along with less time being allocated to phone support by skilled service techs (customer service reps are now equipped to handle many of the customer inquiries)
- Provided full visibility within the Intralox organization, allowing for collaboration across Sales and Service
- Significantly enhanced customer experience and empowered staff by being able to provide real-time insight into schedules, work order statuses, installed base items, PM schedules and product upgrades
- Technicians now equipped with tools and technology to enable field-sales/upsell activities