

## CUSTOMER EXPERIENCE PLATFORM FOR A LEADING FACTORY AUTOMATION SOLUTION PROVIDER

Case Study | **Field Service  
Accelerator**

### AUTOMATION OF THE WORK ORDER PROCESS BY INTEGRATION WITH RESOURCE PLANNING

Mastech InfoTrellis recently helped an industry-leading automation solutions provider in North America create an exceptional customer experience that was delivered through a lifecycle-oriented services platform to expand after-sales support for its global customer base.

#### THE BUSINESS CHALLENGE

The Automation solutions provider provides the perfect synergy of experience through automation technology and scale to advance factory automation solutions for the world's leading manufacturers. They were facing difficulties managing their field service personnel as they were managing their work orders manually, which was inefficient and cumbersome.

They expected to grow their sales by \$400 million in three years, and they sought a multi-channel digital customer experience solution to propel their global services network. They also needed a platform to quote and process proposals while on site and a process to manage work order and efficiently plan resource allocation.

#### THE SOLUTION

Mastech InfoTrellis' solution blends the best of Oracle's Field Service Cloud solution with Oracle Service Cloud's unified agent desktop Oracle ERP; Oracle CPQ and other 3rd party solutions. We automated the work order process by integrating Oracle Field Services with resource planning.

The solution improved exception management by automating time-based routing based on skills, parts, and SLAs into the clients' workflow process. The solution proactively forecasted needs based on resource availability, region, and the client's product.

#### THE OUTCOME AND RESULT

- Improved visibility into the actual workforce capacity, intelligently set and adjusted quotas, and observed critical tasks' lockdown capacity.
- A simplified display for real-time viewing of all field operations, multiple detailed views, and a streamlined job assignment system was put to action.
- Automated inventory transfers and integrations were implemented.
- Insight into the historical performance of each field tech to create a unique performance pattern profile was created. This can be continually updated over time, ensuring work is continuously optimized.
- The solution supported customizable forms & workflows, allowing flexibility for each division and geography.