

**Increase Top Line Growth.  
Increase Bottom Line Growth.  
Do It Fast.**

**How?**

**ProductService CRM™**

A guide to aid your selection  
of the best customer relationship management solution  
for your product service organization.

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## Why ProductService CRM™?

*Companies that furnish a product (a unit of hardware or software that works independently or within a systemic network) must ensure that it performs as expected. When it malfunctions, the entire customer relationship hinges on the seller's ability to take the fastest route to restore performance to expectations. You've gone to great lengths to rise to the challenge at these moments ... but at what cost?*

*Product service-based customer interactions have nearly infinite opportunities for fiscal gain or loss — in inventory control, contracts administration, and resource/workflow management. Failure to capitalize on those opportunities can mean burgeoning inventory levels, inefficient use of resources, lost revenue, and dissatisfied customers. Success can mean lower costs, efficient deployment of resources, higher and new revenue, and happier customers.*

*The companies that succeed will be those with full vision and control of their inventory, contracts, and field and repair center resources. These companies will implement a CRM solution specifically designed for the product service arena. Those that fail will ignore this crucial aspect of the customer relationship, or implement suboptimal systems with superficial product service tracking and logistics capabilities. Because if you can't see it, you can't measure it. And if you can't measure it, you can't improve it.*

*This guide is intended to provide you with an outline for making informed choices regarding product service CRM. While every product service operation is unique, we've assembled a list of some common challenges our customers and prospects have shared with us over the last two decades and outcomes you should expect when implementing the best CRM solutions. This guide also details how Metrix meets these challenges, and enumerates some general results you can expect based on our clients' experiences.*

# Inventory

## Am I making money or losing money on the parts I stock and sell?

Properly managed inventory can turn a product service operation into a major profit center. Jack Welch, CEO of General Electric has noted publicly that the company's aircraft engine division virtually gives jet engines away to capture the revenue stream generated from replacement parts.

Whether the part is consumable, mechanical, electronic, computerized or otherwise, components fail, wear out or require upgrades. These moments need not create excessive costs or operating expenses for your company — if managed well, they can be significant revenue generators. If you already profit from these transactions, there are likely further opportunities to increase your profitability. Consider some of the inventory challenges faced by many product service organizations today (*Table 1*).

## What inventory outcomes should I expect from a superior product service CRM solution?

In a sentence, you should expect total visibility to meet all the inventory challenges as identified in Table 1, at a serial number level. You should know

the location of every spare part you own — in truck stock, in warehouses, at customer sites, at repair centers — anywhere you might stock inventory, and at all inbound and outbound points in between. You should also know the location of parts your customers or distributors may own, but you require to make needed repairs.

Your CRM solution should tell you what parts you'll need in a given time period and where you'll need them so you won't have customers with unacceptable downtime waiting for delivery. Conversely, it should also tell you what you don't need, so you avoid tying up the company's capital in parts that collect dust while potential return on investment melts into loss.

Accurate inventory valuation is another reasonable expectation of your CRM solution. Superior visibility of your inventory means you know at exactly what cost each asset part is valued. This includes new parts, as well as non-functional parts that have been inserted into your repair pool. While a certain part may have a value of \$2,000 when new, you may have removed that part from a customer site because it is defective. To maximize your tax benefits for potentially multi-valued inventory assets, such a part should be accurately valued as a non-functioning part (e.g. \$900), and/or

as a refurbished part (e.g. \$1,650) if and when it is repaired.

## How does Metrix meet these inventory requirements?

### What do I have and where is it?

ProductService CRM™ from Metrix gives you full visibility and control of your inventory. The system will tell you every part, down to the serial number, that you have in warehouses, in the field (e.g. truck stock), at customer sites and distributor locations. It will also tell you what is on order, when it is planned for delivery, and where delivery will occur. ProductService CRM from Metrix will also tell you what orders are allocated against inventory, what is available to borrow, and what is the best source to tap for maximum efficiency and/or minimum cost in any situation.

It will also offer advance replacement logistics tracking and control. And, ProductService CRM will track inventory that has already been purchased by your customer, but is still stored by your company.

For effective bin control, ProductService CRM from Metrix offers two types of warehouse inventory management. Through "static bins," specific bin locations are reserved for specific part numbers. Even if there is zero stock of the part

Table 1

## Inventory challenges

- We don't know what we have on hand.
- We don't know where every part is.
- We don't know what we need.
- We don't know what we don't need.
- We don't know what each part is worth.
- We don't know what state of repair all our spare parts are in.

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on hand, the bin is always held in reserve until more of that part is received. Through “dynamic bins,” you can stock any part in any empty bin, as opposed to reserving bin space for a specific part. Dynamic bins allow for greater space utilization of the warehouse floor. Both types of bin control allow for multiple bins for any given part number. The end result is optimal use of your warehouse space, and maximum visibility of each part in warehouse stock.

**What do I need; what don't I need?**

With our ProductService CRM solution in place, you can track usage and project future needs. Whether in the field or at a repair center, you'll have visibility and analysis of usage patterns to ensure you'll order enough of each part to meet your customers' needs. Additionally, you'll avoid overstocking. For example, if you had ordered 1,000 units of a particular part in the past, you may discover you only need 20 on hand during a particular time frame. By tracking usage patterns, Metrix will allow you to lower your stocking costs.

Metrix's tracking function lets you preload replacements with alternates or substitute parts to winnow down obsolete parts. This allows you to order new parts only when needed, and eliminate the need to scrap parts in which you've invested capital.

**What is each part worth?**

Inventory valuation is another strength of our ProductService CRM solution. Since you know what you have down to the serial number, you can accurately value your inventory. For greater depth and detail, the Metrix solution also allows you to assign lower values to parts in your refurbishment pool. For example, if you replace a \$3,000 sub-assembly on a piece of capital equipment, you'll probably return the non-functioning sub-assembly to a refurbishment pool. By accurately valuing this unit, your inventory value is reduced. This means a portion of the unit's original cost is expensed, thereby reducing taxable profit — resulting in lower taxable income.

**What is the payoff with this degree of inventory visibility?**

Seemingly small incremental improvements in inventory visibility can yield vast cost reductions. One example of this is management of truck stock. An admirable quality of field service engineers (FSE) is that they are driven to make customers happy — quickly. So they often fill their truck with virtually every part they can fit into it. This may give your FSE a great deal of confidence, but it also causes inventory costs to grow exponentially.

In most cases, FSEs should be able to order any item they think they'll need. With each field service visit costing your operation hundreds of dollars, avoiding a return visit by having the right part on the first call minimizes costs. However, if extra parts are ordered and not used, they should also be called back from truck stock. Some Metrix customers cut millions of dollars in inventory costs in the first year of implementation through visibility of the truck stock of their FSEs and the ability to call back or reroute that truck stock to an appropriate location.

Additionally, some organizations operate under a high degree of potential legal scrutiny. Such scrutiny often demands a detailed audit trail of which parts were used for what repair, by whom, on what piece of equipment, and when. In the event you may ever need this degree of detail for legal reasons, ProductService CRM from Metrix delivers it.

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## Contracts

### Am I maximizing profit and customer value with all my entitlements?

Service contracts and various warranties are often regarded as the richest potential source of profit enhancement in product service. But they can also be complex and difficult to track. If not managed properly, customer entitlements can ultimately become a potential source of customer dissatisfaction and lost revenue.

In a competitive environment, your contracts must be flexible enough to meet the customers' needs. So, your CRM solution must be flexible enough to accommodate infinite contract and warranty configurations. And most importantly, it must account for all the responsibilities of both parties under the contract. When you look at CRM solutions for product service, ask yourself the contract-related questions in Table 2 that we often hear from product service organizations.

### What contract outcomes should I expect from a superior product service CRM solution?

A CRM solution designed to accommodate the vast and changing environment of customer entitlements will be flexible enough to track virtually any type of contract you and your customer determine is mutually beneficial. It should measure your investment in meeting these requirements, and tell you how profitable the arrangement is. At a minimum level, it should give your support center staff, repair center managers and engineers, and your FSEs visibility of the terms of any contract — what parts, labor and travel is covered and what is not.

The system you implement should also track when contracts are up for renewal. According to your business model, it should alert the appropriate person for the appropriate action — whether that is a sales call, a phone call from a field service manager, an e-mail or a letter. Additionally, you should be able to calculate the

customer's savings versus non-contract service to help close your renewal proposal. With the proper calculations, you should also be able to tell selected customers that they could save more costs with a higher level of contract service. This increases your revenue and profit generation from contract renewals and upgrades.

A fully functional product service solution will also meet all your invoicing needs. It will account for products that come into service (new installations) and those that are removed from service (e.g. a unit that the customer sells) regardless of where you are in the billing cycle. It will also facilitate contract revenue recognition. Whether you are paid in advance, in installments, or after the term of the contract (as in government contracts) your solution must support the proper monthly revenue recognition.

Many contracts and relationships involve more than two parties — directly or indirectly. If you service

Table 2

## Contract challenges

- Will the system let me deliver exactly what the customer needs, or will it limit the types of contracts I can offer?

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- Can I measure all parameters to ensure that I am meeting these obligations at the maximum profitability?

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- Can I ensure that I bill for billable parts and labor and that I don't bill for parts and services under warranty or contract?

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- Can I track when contracts are up for renewal and optimize repeat business or upselling?

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- Can I support product movements — where units come into and out of service during the term of a contract?

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- Can I support contract revenue recognition?

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- Can I track contracts to service other vendors' products?

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- For items under third party warranty, can I track and bill back to OEMs for items that needed repair or replacement?

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other vendors' products under your product service contracts, your CRM solution should track them as well — what parts and labor are covered under the OEM warranty, what parts delivery commitments apply, etc. The right CRM solution for your product service enterprise will also track all third party warranties on components that your product may contain. Third party parts that fail prematurely should not cost your organization any money if they are covered under warranty. This “lost revenue” from your suppliers could amount to millions of dollars.

**How does Metrix meet these product service contract requirements?**

**How flexible can I be in my contract entitlements?**

ProductService CRM from Metrix has infinite capability for flexibility in contracts. Some common variables include variable or fixed coverage hours, days of the week coverage is available, on-site or off-site, advance replace, guaranteed minimums and maximums. Whether you have a few standard contracts or every agreement is different, Metrix will give you full visibility of all terms. This helps you ensure that you meet your commitments, and that your customers get what they pay for. It also ensures that you don't over-service clients by failing to invoice for services not covered under your agreement.

One example of the strength of this flexibility is in the guaranteed maximum. Consider an arrangement

whereby you agree to make up to 10 service calls for a set fee. Metrix will track the number of calls and alert your dispatcher, repair center manager, etc., when the contract expires. This type of contract is attractive to customers because while they receive a discounted rate, they still only pay for what they use. It is attractive for product service organizations because they maintain a share of the customer's service needs and capture additional service revenue they may have lost without this option.

Additionally, ProductService CRM will track multiple warranties on sub-assemblies within your product down to the individual serial number. When you change a sub-assembly, the warranty is automatically refreshed — whether it covers parts, labor or both.

**Can I track and implement varied billing terms?**

Metrix accounts for all the financial aspects of invoice timing and billing characteristics. Annual revenue recognition is another area of strength for the system. Whether your agreement is for advance payment, installment payment, or payment in arrears, ProductService CRM from Metrix will calculate the full contract revenue recognition divided over the life of the contract.

Some customers may prefer a single invoice with line item detail. Others may prefer multiple invoices for different departments, equipment, etc. Whatever the scenario, you'll have the flexibility to accommodate your customers' internal processes.

**Can I maximize my contract renewal revenue?**

To ensure your product service contracts are renewed, the obvious first requirement is that you know when they are soon to expire. Metrix will ensure you have this information, and alert the appropriate parties based on your established business rules. It may be as simple as an alert to your support center to remind a customer about renewal when he calls. Or it could be as detailed as a monthly report sent to your field service manager detailing all contracts up for renewal. It depends on your needs, but ProductService CRM from Metrix will notify the right people in your organization about all opportunities.

But maximizing repeat contract business and maintaining share of customer requires greater depth of knowledge than a simple calendar can provide. Can you tell your customers how much they saved under the current contract by comparing their actual investment with the total cost for all travel, parts and labor? Metrix will give you that information. This level of detail can also help you sell customers up to higher levels of contract product service. For example, if your customer has a “silver” contract, but exceeded the entitlement, could that customer have saved any money with a “gold” contract? Metrix gives you full visibility of these details for a true consultative approach to product service contract renewal.

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## Resources

### Am I deploying my resources for the maximum benefit at the minimum cost?

Resources is a broad-sweeping term. For the purposes of this discussion, consider your resources to be FSEs, support center and repair center personnel, and the infrastructure you have in place to leverage those people. Do the people in your support center know exactly what is happening in the field at all times? Do they know what must happen at your repair center as a result?

You've invested a great deal in the best people, infrastructure and tools to maintain customer satisfaction. And you are striving to achieve your current goals. But the ever-changing competitive landscape will force you to raise your bar, often to levels unthinkable even a couple of years ago. With superior visibility of those resources and management of workflow, you could meet those goals at a significantly lower cost, turning product service into a major profit center and customer relationship

building tool. We offer some resource/workflow challenges (*Table 3*) commonly heard from product service organizations.

### What resource/workflow outcomes should I expect from a superior product service CRM solution?

The obvious transaction in product service is the repair — either on-site or at a repair center. But a superior CRM solution for your product service operation will also track and link all your resources — keeping your support center, field service force, and repair center(s) in a continuous feedback loop so they operate as a single entity both internally and to the customer.

You should expect your automated solution to make decisions based on your established business process rules so that every transaction doesn't require high-level input from management or highly skilled technical support personnel. At your support center, multiple dispatchers should have real-time vision of the field service schedule — where your FSEs are, what they are scheduled to do, what service they are qualified to perform, where they should be, when their calls are in progress and when they are complete.

Dispatchers, FSEs, bench repair engineers and management should know the level of commitment assigned to every transaction so that those commitments are met without fail. When your FSEs have a call, they should have all the information they need to maximize their efficiency and minimize return visits.

A truly comprehensive product service CRM solution will also offer full reverse logistics functionality. Such functionality will allow you to repair, remanufacture or demanufacture returned and replaced units so they can be quickly returned to your inventory pool for future use.

### How does Metrix meet these resource/workflow requirements?

### Can I minimize support center personnel costs?

ProductService CRM from Metrix allows you to optimize your support center personnel costs by incorporating highly complex business rules into automated functions. Your support center can be staffed with entry level call takers who enter customer information on screen, and the software executes intricate decisions. Some examples of such decisions are: forwarding notifications to dispatchers;

Table 3

## Resource challenges

- We don't always know where our field service engineers are, or when they'll be available.
- Some of our engineers are idle while others are overbooked.
- Our support center personnel costs are too high.
- We're failing to meet response time and time-to-repair commitments.
- Our engineers make too many visits to resolve a problem.
- We lose track of replaced parts that are supposed to come back for repair.
- Our repair center(s) are operationally inefficient.

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alerting higher level technical phone support; and initiating shipment of advance replacement parts. This allows you to minimize your need for high-level technical support staff and management involvement in the product service process.

Further, Metrix offers web self-service solutions so your customers can log their own service requests through your website. The same business rules can apply as with support center call-takers — and the same commands may be executed. Depending on the level of your customers' internet use/capability, this could also allow you to reduce your support center head count and increase customer satisfaction.

Additionally, Metrix has partnered with ServiceSoft® to offer web-based customer self support. By integrating the knowledge-based software solutions of ServiceSoft with ProductService CRM from Metrix, you can allow your customers to present complex problems via the internet, and access your database of possible solutions. This not only reduces call receipt and technical support interaction, it could also eliminate costly field service calls. This level of service can be available to your customers 24 hours-a-day, worldwide. In addition to ServiceSoft, Metrix also provides integration with other knowledge systems you may have developed internally or purchased.

### **Can I deploy my personnel efficiently and effectively?**

ProductService CRM from Metrix offers tools to tie the right personnel resources to the right task based on availability, capability, proximity and time constraints. The system offers full visibility of your engineers' schedules, availability, location and capability. Each dispatcher and field service

manager has easy access to a schedule board that is as intuitive as a magnetic board on a wall. The schedule board offers click, drag and drop functionality, eliminating function keys and the need for extensive training. It is also completely configurable to the appropriate field service size and timelines of your operation.

Business rules can be established to indicate a possible selection of FSEs who can accommodate a particular call based on availability, geography, and response commitments. For example, if the software presents the top three FSEs to a dispatcher or manager, she can then determine based on the schedule board who is most appropriate to schedule for the call. Or, this decision can be automated through the use of tailored business rules.

For more diverse field service forces and more complex situations, Metrix accommodates the fact that different FSEs are trained to perform different tasks. If this is your situation, you can set up work teams — either permanent or ad hoc — to ensure that projects are allocated to teams equipped to address the particular problem. And, the dispatcher or field service manager can visually display the workload for each individual in that group. The same degree of scheduling functionality is available for repair center use as well — so your bench repair engineers will also be utilized efficiently and effectively.

The schedule board's "publish and subscribe" feature of the Metrix solution is unmatched in the industry. This is another crucial component of scheduling efficiency for both bench repair and field service dispatch. When a call taker, dispatcher or manager has any data displayed on screen, they

have commissioned a software agent indicating they wish to "subscribe" to any changes to the data they are viewing. The moment any other process in the operation "publishes" a change to the data, the change appears on the subscriber's screen.

All changes to that data are automatically updated on screen, in real time. This can become especially important in a dispatch situation where FSE availability could change in a moment. Whether two dispatchers viewing overlapping data are a desk apart or a continent apart, they can be 100 percent confident that they are viewing current data without constantly clicking a "refresh" button on their system.

### **How can I ensure that our response time commitments are met?**

The support center dreads the call from a customer who was promised a four hour response time, and hasn't heard anything after five hours. Just as the FSE hates to arrive on site at 11:00 a.m., met by an angry customer who was expecting him at 9:00 a.m. Failing to meet customer expectations is the fastest way to sour your relationship, and reduce your future revenue with that customer.

With ProductService CRM from Metrix, these surprises are eliminated. The system accommodates infinite alerts via screen notification, page or e-mail (or any combination) based on your business practices. For example, if response is called for within 24 hours, the FSE, manager and/or dispatcher can be alerted when there are four hours remaining to achieve an acceptable response. The possibilities and combinations are limitless, but the implication is clear — there is no reason to fail the customer. Again, the same alerts can be tied to completion

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and shipping times in the repair center. This capability becomes immediately crucial to your bottom line when compensation is based on response times and time to repair.

### **Can I reduce the number of field visits?**

The most efficient field force is well informed. ProductService CRM from Metrix offers a module called Techlink® to meet this requirement. While your entire customer database could never fit on a single laptop, segments of it can be stored easily. With Techlink, when a task is assigned to a FSE, he can look locally at the data, and/or connect to the database and download all the customer's data. This connection can be over phone lines or wireless. He will have access to the entire history of the product, the history of the problem, and information on any other products you have on site. Any entitlements (warranties or contracts) affecting the products are also seen by the FSE.

There are myriad opportunities for increased efficiency with this feature. For example, if an FSE is on site for an emergency visit, she can check her Techlink customer data for any other products you may have at the site. She may discover you have another unit that is scheduled for preventive maintenance in three weeks. She can perform the PM at that time, and eliminate a second visit — saving hundreds of dollars in operational costs.

Techlink also records all the work that was done on the visit — what parts were used, how much time was spent for travel and labor, any parts that must be ordered, and any follow-up actions that may be required. This data is then uploaded

to the central database via phone line or radiofrequency whenever your business process requires. This single upload of data refreshes all schedule boards, and all customer data in real time. And, it is only entered once — eliminating the need for double data entry and the potential for transcription error.

### **How can I address reverse logistics?**

Another important topic in the realm of product service CRM that is often overlooked by many available solutions is reverse logistics. This pertains to parts or products that have been replaced in the field and are returning for repair, remanufacturing or demanufacturing. This may appear to be an inventory issue, but there is actually a complex workflow process attached to that piece of devalued inventory. ProductService CRM from Metrix alerts the repair center as to when the unit can be expected. Established business rules dictate how the repair center addresses that unit. It may be refurbished, tested, and returned to the working inventory pool. Or it may be demanufactured and disposed of. In any case, the right resources must be deployed to ensure the unit is addressed accurately and efficiently from workflow, inventory and financial perspectives.

### **Can I maximize repair center efficiency?**

To streamline your repair center operations, ProductService CRM from Metrix:

- Automates the repair process through workflow management — standardizing each step and tracking standard hours vs. actual hours vs. billable hours.
- Allows you to direct work based on capacity or specialization.
- Reduces costs with expert diagnostic tools.
- Automates bench techs' workloads — letting them troubleshoot the product, review similar cases, replace a part, log repair time, change the unit's revision, reassign the unit to another technician, and move the unit to another inventory location.
- Automates generation of shop floor travelers for every unit.
- Accommodates multi-repair center operations, including third-party repair vendors.
- Integrates multi-currency and multi-language functions for international operations.

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## The Future

### **Am I ready for the known and unknown developments to come next year ... in two years ... in five years?**

You may have a very clear idea where your business will be in three years. Or you may not be sure at all. Regardless of your position, things change. Your firm should grow, and new technologies will emerge. Virtually all IT vendors claim to have a roadmap to the future. They'll dazzle you with technology stories and tales of works-in-progress. But we believe the most accurate predictor of the future is the past. So your best partner to help you meet the near-term and long-term challenges ahead is one with a demonstrated track record of good corporate citizenship.

### **What is a good corporate citizen?**

A good corporate citizen is a partner that doesn't view its software offering as the center of the universe. While Metrix certainly understands the vast importance and unique nature of product service operations, we also appreciate that automation of this function is only one component of your corporate IT mix.

You have accounting needs with software and processes in place to meet them. You may have implemented sales and marketing automation (or plan to in the future). You have sales needs that relate closely to your product service operation. All these areas are intimately linked. And a good corporate citizen will offer you the freedom to choose which solution meets your needs in these areas.

By implementing our ProductService CRM solutions at companies like Bell South, Cisco Systems, Motorola, 3M Imation, Tektronix and Ericsson over the last two decades, Metrix has learned to

create software that will support and coexist with other areas of your IT environment.

We've learned that our offering must reside in situations where exchange of data is paramount. Other systems must access our data and we must access information from other databases if all your IT investments are to be maximized. All this should occur in the most convenient, least threatening way possible — and it should require the least resources possible.

### **What are some examples of Metrix's good corporate citizenship?**

One example of Metrix's good corporate citizenship within the customer organization can be found in our software's notification agent function. For example, suppose you have a key customer — ABC, Inc. One of your sales reps is working on a \$2 million sale to ABC. A priority one service request comes to your support center from ABC.

Metrix software allows you to establish notification agents in the software on a permanent or ad hoc basis. In this case, the sales rep working on the new deal can be paged or e-mailed immediately, and informed of the situation to whatever level of detail your business rules dictate. The reality of most other solutions is that they limit your dispatching agents to placing a physical stick-up note on their monitors to ensure they alert sales of such a situation.

This capability is ostensibly outside the realm of your product service operation. But it can be crucial to your organization's bottom line. It is an example of Metrix's universal view of your company's needs, and how a good corporate citizen thinks.

Another example of Metrix's approach at work is the integration

of data from your product service operation into your engineering processes. ProductService CRM from Metrix captures failure/repair/quality control data by product and/or part for reporting to your engineering department. Depending on your business needs, for instance, this reporting can be integrated with your marketing automation, or sent via e-mail alert, or documented via hard copy to specific individuals or groups. As such, flaws that may have been missed otherwise, will be addressed in future product design.

### **How is Metrix's corporate citizenship affecting recent and near-term developments?**

A forward looking feature allows our ProductService CRM users to cross-retrieve information from databases that are not in the Metrix infrastructure — without a costly interface. For example, your support center receives a call for product service. Unbeknownst to the call taker, there is a credit hold on that customer's account. This credit hold status may be maintained in an SAP R/3 accounting application, for example.

With this new feature, the information will appear on the call screen, in real time, without the need for a special interface. The degree to which users will cross populate and display data will be configurable based on your requirements.

Further, Metrix's use of the Forté® development environment allows for strategic integration with Forté's Fusion™ product. This technology approach facilitates a standard method of integrating software applications within your IT infrastructure via Extensible Markup Language (XML). The Forté Fusion XML application connectors extend the standard Metrix component framework, providing leading Enterprise Application Integration (EAI) capability. This gives

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your IT organization a coherent system for business process integration and delivers the features that will help create competitive advantage for your enterprise.

### **What is an appropriate eService strategy for product-oriented companies?**

This is a common question, but often asked for different reasons. Some corporations have an eBusiness model in operation already — including marketing, selling, servicing and distribution. Others have a road map to get there in a defined time period. Still others don't have a road map, but they want to be sure their partners will get them there when the time comes.

Metrix's solutions deliver web functionality — from the e-mail alerts noted earlier to web-based customer self support and service requests by your customers. But even more important than current web-based features is the ability to launch your entire product service operation into the emerging eBusiness model.

The bottom line is that your business will have a web component sooner or later. You need to know you've partnered with a vendor who understands the eBusiness model, and can get your product service operations to the web in the context of the entire world-wide operation.

### **Will ProductService CRM from Metrix grow with my operation?**

Metrix solutions are currently in place in product service organizations ranging in size from ten-person regional operations to global providers with thousands of personnel. At each of these installations, the product is designed and architected to be virtually the same — all that differs is the configuration and implementation. This is because ProductService CRM from Metrix is built on an n-tier, distributed, object oriented architecture delivering unlimited scalability to meet today's needs, near-term growth, and even a long-term explosion in size.

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## ***Shop around, ask the right questions, and demand the right answers.***

*There is certainly plenty of excitement over CRM today as corporations realize how critical one-to-one customer relationships are to top line and bottom line growth. But industry leaders and analysts are realizing that the product service arena presents unique CRM challenges that are vastly different from the ones faced in sales, marketing and accounting.*

*Experts agree that a company's product service customer relationships demand a uniquely tailored CRM solution. In Customer Support Management Magazine, Peggy Menconi of AMR Research commented that the market will "split into product-oriented and service-oriented CRM, because the relationships with customers in those areas are different."<sup>1</sup>*

*In the same article, Jeff Goldsmith of the Gartner Group remarked, "There is no such thing as a CRM vendor. No single vendor does it all. It's a strategy that must be brought down to a more manageable level."*

*We believe Metrix is The Leader in ProductService CRM™. But, we're biased, of course. So consider the issues we've raised, and any others that may be particular to your product service organization. Challenge your potential vendors to give you the full picture of what you should expect for your operation. We suggest that you should expect nothing less than full visibility and control of your inventory, contracts and resources to optimize your product service customer relationships.*

*Without meeting these requirements, you'll leave revenue uncaptured, cost-savings unrealized and your customers' expectations unfulfilled. Finally, we suggest that this level of visibility will turn your product service organization into a significant profit center for your company. We know, we've seen it happen with our clients.*

<sup>1</sup>Customer Support Management Magazine, July/August, 1999.

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