

Westmor Takes Data-Driven Customer Experience to the Next Level



Challenge

Westmor Industries is one of North America’s leading manufacturers and suppliers of storage, transportation, and dispensing equipment for petroleum and energy products. The company has been a ServiceMax customer for over 10 years and continues adopting new ServiceMax products to increase efficiency and reduce admin time while improving customer and employee satisfaction.

As Westmor continues to grow, and worldwide events—such as geopolitics, energy transition challenges, and a volatile supply chain—are impacting decision-making in the industry, they’re committed to investing in and optimizing their processes to adapt, streamline operations, and offer the best possible customer experience.

Prior to using ServiceMax, Westmor’s field service departments were bogged down with time-consuming paperwork, and sales had limited customer visibility. Phase 1 of their digital transformation helped saw Westmor begin moving from manual to digital processes to better manage and serve its customers.

Westmor also wanted a complete picture of how their field service assets were used by each customer to get a comprehensive understanding of the areas that were working well and which ones needed to improve. Since profitability was a key objective, they also needed insights on technician utilization and how much billable time a technician was performing each week. And they knew it was all about the quality, not just the quantity of the data.



Solution

Westmor turned to ServiceMax for a field service management solution that enabled them to better understand their asset data as well as their customers and boost productivity through automation. Specifically, Westmor started using two ServiceMax products: [DataGuide](#) and [Service Board](#).

Using critical data more efficiently with DataGuide

DataGuide allows field technicians to focus on the information that's essential for the job at hand—with or without an internet connection—to efficiently capture and present data in support of a range of tasks such as inspection, maintenance, and safety. Advanced logic built into the forms ensures field technicians are proactively sent the right forms in the right situations, while fields that they already have the answer for are being auto-populated.

The ease of the DataGuide forms, along with the integrated ServiceMax data served up in mobile field service management app [Go](#), helps field technicians boost their productivity, reduces administrative time, and eliminates costly errors in their service data. It also facilitates compliance with regulatory and business needs.

"We have a lot of regulation in the oil and gas industry that we have to maintain," said Zach Arnold, Field Service Manager at Westmor. "After each test there can be up to eight documents that need to be filled out, and it can be very frustrating for the technician in the field to enter the name of the location, the address, and the phone number every single time. Now with DataGuide, we have the ability for all that info to auto-populate since it's already linked to the work order. We are just filling in the information we came to get, not all the tedious stuff!"



DataGuide is helpful because all relevant forms are automatically sent to the technician, known fields are already pre-populated, and once complete they get sent directly to the respective government agency. It automates the whole process, which in turn translates to better service for our customers."

Zach Arnold, Field Service Manager, Westmor

ServiceMax Impact

- ↑ 20% Technician utilization
- ↑ 20-30% Work orders processed
- ↓ 10 HOURS PER WEEK Saved on operational productivity
- ↑ Increased first time fix rates
- ↑ Increased customer satisfaction



Increasing productivity with Service Board

Service Board makes our field services work order scheduling much easier. The scheduling environment enables team members to find relevant information fast and uses real-time alerts and notifications to optimize the work of field service dispatchers.

Specifically, Service Board helps Westmor find nearby jobs, increase efficiency, quickly recover from emergencies, fill gaps in the schedule through intelligent recommendations, and thus keep utilization high. It empowers everyone to remain flexible and react quickly to unexpected situations to maximize dispatcher effectiveness.

Westmor technicians now use ServiceMax on their iPads, which also works offline. This is especially useful as many of the company's customers are in remote areas of the Midwest with limited Wi-Fi or cellular availability. Technicians download all the information they need for their scheduled work in advance, and once they reach a spot with reception, their data syncs and is immediately updated.

Results

ServiceMax has helped Westmor deliver a customer experience that sets them apart from the competition. The company is working smarter in its field service provision, and every technician is now more engaged and contributing data from on-site visits, which has led to a 20% increase in technician utilization and saved approximately 10 hours per week.

Better utilized technicians have also contributed to an increase in Westmor's first-time fix rate and customer satisfaction. With more time to spend, technicians now process up to 30% more work orders and collect on them fast—improving time to invoice from nine days to one.

Not only has Westmor eliminated manual processes and increased customer transparency, but ServiceMax has also provided the company with access to internal data they have never had before. They can see how valuable each technician is to their bottom line with a fully integrated service process and can easily track how much work is being done.

The service data also feeds back to other departments impacted within the organization—sales, IT, marketing, customer support, and even product design—and empowers everyone to predict, plan and personalize customer services. Team members can now make decisions more quickly, such as suggesting upgrades, upselling services, or offering new pricing structures.

As a result, Westmor is able to communicate more clearly and more effectively with their field service customers. Whenever they have a question (for example, about the status of the work order, what actions took place, and how much it cost), Westmor is able to provide a quick and accurate answer, which builds trust, increases customer satisfaction, and ultimately drives revenue.

"ServiceMax has enabled Westmor to bring a high level of professionalism to our service technicians," Zach Arnold, Westmor's Field Service Manager, pointed out. "As we continue to grow our geographic regions, the use of ServiceMax makes our processes scalable, and technicians and call center agents can react to customers in real time."

Learn more about how Westmor is supporting its energy customers through service by watching [this episode](#) of the Future of Service series.