

USE CASE

Preventive Maintenance

A Fortune Global 500 engineering, manufacturing, and service company turned to TrueContext to resolve issues with its preventive maintenance program and modernize its installation, inspection, and maintenance services.



- ✓ Faster form completion & deployment
- ✓ Enhanced agility
- ✓ Increased compliance
- ✓ Improved handover
- ✓ Ability to seize new opportunities
- ✓ Improved customer satisfaction

INEFFICIENT PROCESSES

Using paper-based forms caused many problems. Critical information was sometimes missed, and handwritten forms were hard to decipher. It was difficult to capture and consume information collected in the field because of this inconvenient and error-prone process.

INCREASED WORK

Evidence needed to serve a warranty claim, find and order correct parts, repair and return a piece of equipment into service, or identify critical safety issues was emailed to branch offices. Staff had to merge these digital pictures with paper forms, leading to extra work and decreased efficiency.



The challenge

MANUAL FIELD PROCESSES

Everything about the field service process was manual, including following up on audits, task assignments, checking with supervisors, and more.

COMPLIANCE AND AUDITS

The company faced compliance deficiencies that were difficult to identify, follow up on, and coach employees on how to perform and improve. Teams were unable to gather complete information or weren't fully aware of what the questions meant or how to answer them during audits.



TrueContext as a product has the capability to revolutionize how you collect information in the field and use it to jumpstart internal processes. TrueContext as a company has been a great partner helping us along in our journey and they continue to invest heavily in their product.

CIO
FORTUNE GLOBAL 500 ENGINEERING,
MANUFACTURING, AND SERVICE COMPANY

Outcomes

With TrueContext, the Fortune Global 500 engineering, manufacturing, and service company has improved its field services operations, specifically for preventive maintenance and inspection work on expensive equipment. They have generated positive business outcomes in several key areas:

▶ FASTER FORM COMPLETION & DEPLOYMENT

TrueContext helped the company eliminate the slow, error-prone process of completing paperwork. As soon as there's a new idea or a need for a new form, it's created rapidly using TrueContext's visual, low-code development platform.

▶ ENHANCED AGILITY

The organization has reimagined its processes and can now capture data in exciting ways, such as using barcode scanners to verify the equipment model, taking pictures with geo-tagging enabled, or auto-routing forms to more than 20 destinations at once.

▶ INCREASED COMPLIANCE

The company now easily generates a compliance report that highlights completed directives by customer and open directives yet to be actioned. This has reduced fix costs by limiting costly follow-ups and improved first-time fix rates. The brand is now seen as an innovator in asset management, repair, accountability, transparency, and audits.

▶ IMPROVED HANDOVER

Leveraging TrueContext, the Fortune Global 500 company built a digital workflow that can now track the handover owner at a branch and technician level. This has streamlined the installation to service/modernization process and increased field service productivity and accountability.

▶ SEIZING NEW OPPORTUNITIES

TrueContext's mobile app has enabled field technicians to capture opportunities in the field, such as identifying expansion contracts or retrofits. When opportunities are added to the form, they are automatically flagged in the company's Salesforce lead flows.

▶ IMPROVED CUSTOMER SATISFACTION

Modernization of the entire field service process has improved service quality, leading to better customer satisfaction.



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