Case Study

Ziegler CAT Improves Service Through Video Collaboration

With the use of a video collaboration tool, Ziegler CAT has reduced the length of its technology support calls by 50 percent.

by Sarah Nicastro

With 22 locations in Minnesota and Iowa, Ziegler is one of the largest Caterpillar dealers in North America. Ziegler sells and services

Todd Hesse of Ziegler CAT believes that in three to five years, the majority of companies will be using video collaboration — but for now it is a competitive differentiator.

construction, paving, forestry, and mining equipment, as well as generators and industrial engines. In the agricultural market, Ziegler represents Challenger, AGCO-application, and Lexion machinery in Minnesota, Iowa, Wisconsin, and Missouri.

Ziegler adds various technologies to the equipment it sells to provide complete solutions for its customers. The company has nearly 300 field technicians who provide service to customers as part of warranty contracts or as billed services. In addition to the team of field technicians, Ziegler employs 50 "TCs" or technical communicators. The TCs take calls from field technicians on jobs to help them diagnose and troubleshoot issues, as well as from customers via a 1-800 number when customers are trying to resolve issues on their own.

When William H. Ziegler founded the company in 1914, he set a corporate philosophy that still stands: "Sell the best equipment, provide the best service." Todd Hesse, product manager for Precision Ag Technologies at Ziegler CAT, had this philosophy in mind when he recommended the company explore how the use of video collaboration technology could improve service. Hesse has been with the company for 10 years, and during his tenure has had numerous roles including functions in which he was closely involved in the service process. While he was interacting with customers through service, he realized the opportunity that existed to leverage technology to streamline service and ultimately improve the customer experience.

Broad Product Portfolio Leads To Service Complexities

"Because we have such a variety of equipment, with more than 30 different technologies in

use, providing service is a bit complex," Hesse explains. "Trying to diagnose issues and suggest repairs over the phone across so many products wasn't easy or often even possible. So what would happen is, a field technician would drive three hours to do a five minute repair, and then three hours back." As Hesse witnessed these inefficiencies firsthand, he realized that with all of the technologies available today, there had to be a better way to remotely diagnose and even repair problems. As he changed roles again and had some additional time to investigate, he began researching options.

Hesse first spoke with his manager about the idea of deploying a video collaboration tool to enable remote support. His manager was on board with the idea, and Hesse's research continued. He used Google search as his main method of gathering information, trying a variety of search terms to find the right tools. He came up with a list of about 10 vendors this way, with three that made his short list.

At this point, his manager indicated that he needed to formalize his business case and present it to the Ziegler executive leadership team. He conducted a product demo to show the team how simple the solution is to use and centered his business case on the company's mission statement. "Our mission statement is to satisfy customers with innovative solutions that set the standard for value in the markets we serve," he explains. "Surrounding that vision are all of our company standards — integrity, customer focus, continuous improvement, and so on. If you look at that mission and those principles, and then look at the capabilities this technology was going to provide our business, it was a pretty clear case."

Hesse got buy-in from the leadership team, and the company selected Librestream's Onsight video collaboration platform. "The workflow of Librestream's solution was the best fit for

us," explains Hesse. "By that I mean, it didn't change the way we currently interacted with our customer base, but it gave us an additional form of communication to use when we deemed

Todd Hesse of Ziegler CAT says of the company's pre-video collaboration days, "Trying to diagnose issues and suggest repairs over the phone across so many products wasn't easy or often even possible. So what would happen is, a field technician would drive three hours to do a five minute repair, and then three hours back."

necessary." What Hesse is referring to is that when customers (or field technicians) call the 800-number with an issue, they are routed to a TC based on Ziegler's own criteria. Many of the solutions Hesse evaluated necessitated a direct line with the support contact, giving more control to the customer and taking away Ziegler's ability to manage the routing of the calls as the company sees fit. "All support personnel are logged in our phone system and queue based on skill-based routing," Hesse adds. "We want to make sure we're maximizing the use of our resources — we don't want one person taking 10 calls while other TCs sit idle. We liked that we control when to use Onsight, and we can keep the distribution of calls even."

Video Collaboration Deployment Challenges

Ziegler was already in the process of deploying smartphones to its field technicians so that

> "Our goal with technology is to be cutting edge. Not bleeding edge, but cutting edge."
>
> Todd Hesse, Ziegler CAT

each group (construction and agriculture) could use apps specifically for predelivery inspection. During the smartphone deployment, Ziegler began testing the Onsight solution with some TCs and parts employees (to help more accurately identify the proper parts to send to a customer). Once the smartphones were in the hands of some of the field technicians, a pilot began with 10 TCs and 10 field technicians. Ziegler was happy with the way the platform performed during the pilot, and plans for full-scale rollout began.

One of the biggest challenges Ziegler faced in fully deploying Onsight was the dispersed nature of its field force. Some of the company's technicians are dispatched from home and don't report to an office regularly, so scheduling training with each of the nearly 300 technicians was a feat. Hesse scheduled branch visits to try to train the majority of the technicians and then added some web training for those who couldn't attend a session live.

Besides the logistical challenges of training all the technicians, Zielger also encountered some employee pushback common with the introduction of new technology. "Overall, the feedback was positive," says Hesse. "But with the nature of the solution, if you're interacting with a customer who has a poor connection, you can experience some issues. That's no fault of the solution, just the nature of cellular connectivity. When things like this would happen, the employees who were skeptical were quick to point out the problems and say 'It doesn't work.'"

While the solution is fully deployed, training is ongoing. As Hesse puts it, "We are training for awareness. We've fully rolled out, but we're still working on full adoption." The way Onsight is being used, it isn't a mandatory tool for TCs or technicians to use — therefore, the company has to continue the awareness of the tool and work to get full buy-in and adoption from employees. Hesse explains that Ziegler just recently began tracking use of the solution so that management can look for gaps in adoption to target training more specifically.

Communicating New Capabilities To Your Customer Base

In addition to the training of its employees on the Onsight video collaboration tool, Zielger also had to develop a strategy to communicate the new functionality to its customer base. "We worked with our marketing team to determine the best way to get the message out through our website and email blast," says Hesse. "We also spent time educating our sales team on how to describe the value of Onsight to our customers, including providing demos. Demos our sales team conducts have proven to be the most successful tool in making our customers aware of Onsight, what it can do, and how it works."

All field service technicians have the Onsight app downloaded to their smartphone, and Ziegler prompts customers to download it as sales are made or service is required. With the app installed, TCs can quickly initiate a video collaboration session with the field technician or customer in the field. When working with customers to resolve an issue, TCs can send a text to the customer's smartphone that provides two links — one to download the Onsight app if they haven't already, the second to initiate a live video stream if the app is installed. All the customer has to do is click the appropriate link, and the TC can use Onsight to remotely diagnose — and often repair — issues. While Onsight is in use — either with field technicians or customers — TCs can take

photos of the live stream, record it if necessary, and telestrate to point out certain things.

The benefits of the Onsight solution have been particularly clear to Ziegler when it comes to technology support calls (versus equipment support calls). With the use of Onsight, the length of a support call for a technology issue has been reduced by 50 percent. For equipment support calls, the time to resolution has been reduced by around 20 percent. Onsight has also eliminated the need for TCs to visit customer sites which, while not frequent, was sometimes necessary for particularly difficult support calls. "While we do want to measure the impact of the tool, it's much more than that to us — we feel it is a major differentiator for us in the marketplace. In three to five years, everyone will be doing this, but right now it truly sets us apart," says Hesse.

Looking Ahead To Expand Collaboration Possibilities

Ziegler is in the investigative stages with wearable technology, and Hesse thinks that could be a next area of investment for the company. "There have been a lot of breakthroughs with wearable technology recently, including the latest iteration of Google Glass. When it comes to field service, it would be nice to have the hands-free collaboration a tool like Google Glass would allow. So we're looking into that. Our goal with technology is to be cutting edge. Not bleeding edge, but cutting edge," says Hesse. •

LIBRESTREAM

information@librestream.com
North America Toll Free: 1.800.849.5507
Headquarters-International: 1.204.487.0612
www.librestream.com