YOUR RMA AND SERVICE MANAGEMENT AUTOMATION **CHECKLIST**

RMA and Service Management Automation can deliver big results: decrease service turnaround times significantly, reduce the costs of handling returns and service, improve the customer experience and lead to new revenues and company profits. As Henry Ford said, "A business absolutely devoted to service will have only one worry about profits. They will be embarrassingly large." RMA and Service Management Automation can give you the best of both worlds: reduce costs and increase profits while improving after-sales service and the customer experience at the same time.

Now it’s your turn to reap these same benefits for your business. As you explore the market of RMA and Service Management Automation solutions, here is a 3-step checklist to follow to help you make an informed decision that’s right for you.

STEP **1** WHAT ARE YOU TRYING TO ACHIEVE?

What would you like to achieve with a RMA and Service Management Automation solution?
To start, please identify and document your goals.

ENTER YOUR GOALS	**SAMPLE GOALS**
1	I want to lower costs on after-sales services
2	I want to improve the customer experience
3	I want to collect, analyze and report on product fault data

RENEWITY
RMA & SERVICE MANAGEMENT

STEP 2 RMA AND SERVICE MANAGEMENT AUTOMATION CHECKLIST

Use this checklist to ensure your RMA and Service Management Automation solution has all the capabilities you need for both your current and future after-sales service needs.

1 CONFIGURABILITY

Your RMA and Service Management Automation solution should be configurable to meet the data and process needs that are unique to your company and product lines for Returns and Service Management(RSM).

Data

- ☐ Ability to define any number of custom fields, custom field groups, and screens
- ☐ Role based access to data: ability to define exactly what Return Material Authorization (RMA) data a service rep can see and edit based on role

Analytics and Data Insight

- ☐ Reports/Charts: Define and run custom reports and charts
- ☐ Create KPI reports
- ☐ Define dashboards that deliver an at-a-glance view of RMA status, efficiencies, etc.

Process and Workflow

- ☐ Define states/stages of the process
- ☐ Define state events based on the state of one or more fields of the RMA
- ☐ Define escalation events based on elapsed time in process steps
- ☐ Define any number of RMA handling processes each with their own custom data and unique workflows
- ☐ Refine and adjust data and processes, with no custom programming or IT support needed

2 END USER USABILITY

Your RMA and Service Management Automation solution should provide a portal for your customers to improve the customer experience and to collect relevant data from the client.

- ☐ Enter an RMA on your website and see its status
- ☐ Enter multiple units on one RMA
- ☐ Upload and attach documents and photos to an RMA
- ☐ View files attached by service reps
- ☐ Admins can specify the screens presented to the customer when they submit an RMA
- ☐ Admins can specify what RMA data and/or process is visible to the customer when they submit an RMA
- ☐ Provision of a knowledge base with different visibilities for customers, partners and select groups
- ☐ Email Integration: ability of system to parse emails sent by end users and have them attached to the relevant RMA

End User Submission of RMAs

Warranty Checking

- ☐ Check warranty during entry of RMA by customer
- ☐ Notify customer if unit is not under warranty
- ☐ Notify customer if the serial number is not valid
- ☐ Check warranty on serial number or other unique fields for its product

Lookup Tables

- ☐ Pull unit data automatically from a table based on a serial number—reduces data entry by end user and service rep and ensures accurate data

Registered Products

- ☐ Enables customers to register products
- ☐ Only allow RMAs to be submitted by the customer on registered products

3 SERVICE REP USABILITY

The service reps on your service team need to be able to handle and process RMAs quickly and in accordance with your defined processes.

- ☐ Create RMA on a customer account
- ☐ Edit, close and cancel RMAs
- ☐ Search RMAs – on any RMA field
- ☐ Add related file attachments
- ☐ Add related web links
- ☐ Send emails with file attachments and reports
- ☐ Move RMA through definable states of RMA process
- ☐ Update multiple RMAs from an excel
- ☐ Create and run reports (with filters)
- ☐ Export data to Excel
- ☐ Manage knowledge base and download area without marketing or IT support
- ☐ Create and use canned responses on emails and include any RMA and customer data
- ☐ Manage Parts Table through lookup table updates
- ☐ See entire history of RMA: all state events, escalation events, all actions, all state changes, all data edits (time stamped with user)
- ☐ Manage Lookup Tables: update lookup tables by record and via excel file.
- ☐ Generate and send quotes for repair and other services
- ☐ Handle multiple units on one RMA through any of the following:
  - Individual unit split
  - Group unit split
  - Swap units
  - Barcode scans units for data entry
  - Add units to RMA from Excel and update units on RMA from Excel

4 TEAM COLLABORATION

Your service team, sales team, and other internal teams need visibility into service. Providing this visibility will improve collaboration and reduce costs across all teams.

- ☐ Email Integration: Parse emails and associate them to the relevant RMAs
- ☐ Automated Emails: Fire state event and escalation events and send emails internally and to customers—qualified on RMA and custom field values
- ☐ Knowledge base so the service team has access to relevant data and what customers are searching for with regards to after-sales service
- ☐ Integration to major CRM systems such as Salesforce, Microsoft Dynamics 365, and Zendesk:
  - Allow sales reps in the CRM system to see all RMAs for a contact and account
  - Allow customer service reps in the CRM system to see all RMAs for a contact and account, and to create RMAs in RSM system
  - Transfer all case and ticket data from CRM system to RSM solution

5 BRANDING

You need to adjust the look of the customer portal to your company colors and branding.

- ☐ Customize colors and text on portal
- ☐ White label the customer portal
- ☐ Fully configure RMA website verbiages such as Introduction Page, Product Return Policy, and Instructions to enter RMAs

6 VENDOR CAPABILITIES

Make sure the selected vendor has the resources, capability, and industry-proven experience to support you as you set up your solution and after.	
☐ Vendor uses a world-class data center with backups, disaster recovery, security, speed, scalability, industry certifications (SOC1, SOC2, HIPPA, etc.)	☐ Vendor provides mentored setup / best practices with experts in many implementations with manufacturers in many industrial verticals ☐ Proven ability to deploy fast and affordably

STEP 3 COMPARE YOUR OPTIONS

Now that you know what capabilities to seek out, you can use this checklist to evaluate several solutions. Even a simple side-by-side comparison can provide you real context into what best aligns to your needs. Focus on capabilities, not specific features or how the capabilities are delivered.

Then, finally indicate some specific tasks you need your RMA and Service Management Automation solution to be capable of conducting:

1 ....

2 ....

3 ....

Examples of specific tasks include:

Handle multiple Units on one RMA

Handle Multiple Repair Centers

Automate emails to customers