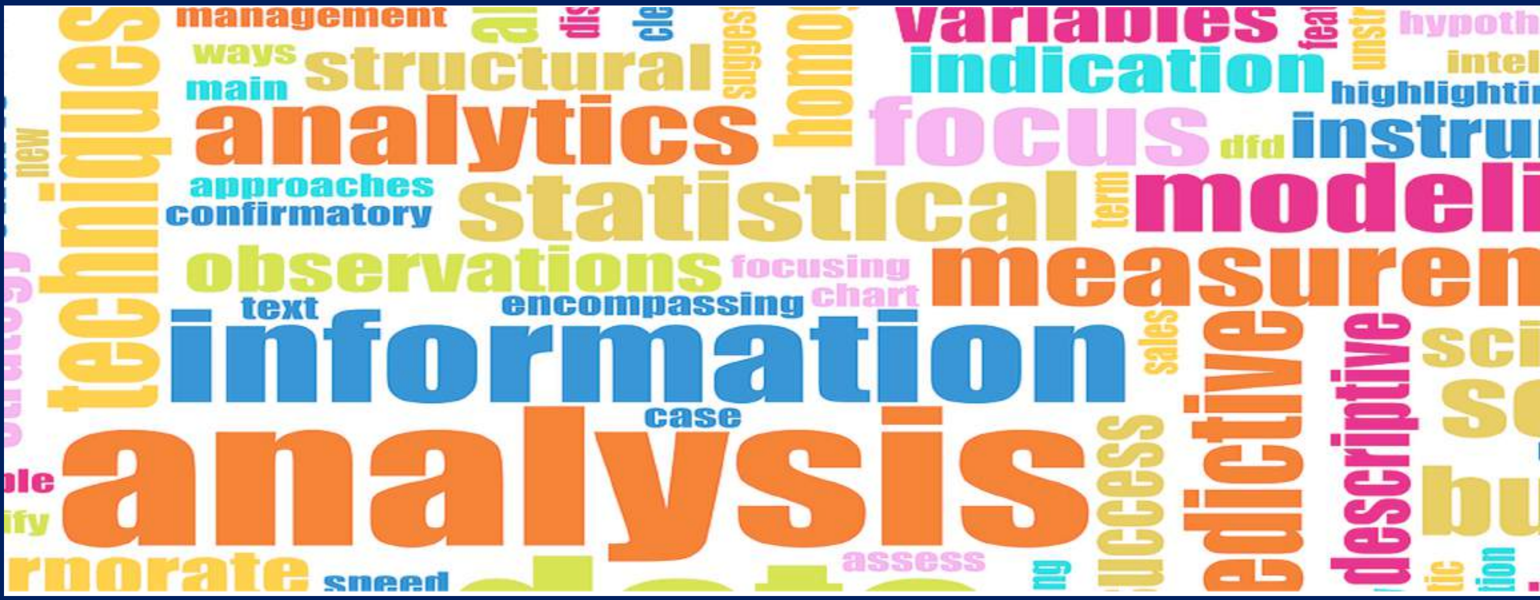
An *SFG℠* Analysts Take



Warranty Management Is the Best Way for Services Organizations to Ensure Recurring Revenue Streams

Driving Revenues During the COVID-19 Pandemic May Be Somewhat Problematic; However, Post-COVID-19, Warranty Management Works!

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A Special *SFG℠* Analysts Take

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Preface

This *Analysts Take* paper was written exclusively by ***Strategies For Growth℠*** (***SFG℠***), an independent research analysis and consulting firm. All narrative, charts and analysis contained in this document represent the express thoughts and opinions of ***SFG℠*** and the paper's author, Bill Pollock.

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A. Putting Everything in Perspective: Why Warranty Management Works

The data and analysis contained in this paper are based on the results of ***Strategies For Growth***℠'s (***SFG***℠) *2020 Warranty Chain Management Benchmark Survey*. The global respondent base for this survey is comprised of 105 warranty management professionals.

Overall, survey respondents appear to be focused on a "cluster" of customer-centric market factors that are driving their respective organizations to improve existing levels of warranty management performance. The top drivers cited are:

- **60%** Post-sale customer satisfaction issues
- **43%** Desire to improve customer retention
- **40%** Customer demand for improved warranty management services

In order to effectively address these challenges – and strive to attain Best Practices – respondents then cite the following as the most needed strategic actions to be taken:

- **46%** Improve Warranty Management–related planning and forecasting activities
- **43%** Develop/improve metrics, or KPIs, for advanced warranty chain analytics
- **34%** Restructure for improved Warranty Management oversight & accountability

The most common technology solutions currently being used by services organizations include CRM, ERP, FSM, SP/IM and WM:

- **83%** Customer Relationship Management (CRM)
- **69%** Enterprise Resource Planning (ERP)
- **59%** Field Service Management (FSM) solution
- **55%** Spare Parts / Inventory Management
- **52%** Warranty Management

The primary Key Performance Indicators (KPIs) currently being used by Warranty Management Organizations begin with Customer Satisfaction:

- **72%** Customer Satisfaction (cited by **56%** as their number one KPI)
- **72%** Total Warranty Costs (cited by **17%** as their number one KPI)
- **72%** Analysis Cycle Time (cited by **11%** as their number one KPI)
- **56%** Claims Processing Time (not cited as a number one KPI)
- **48%** Warranty Costs, per Product (cited by **6%** as their number one KPI)

The remainder of this *Analysts Take* paper provides additional insight into each of these and other related areas that may be impacting an organization's drive to attain warranty chain management Best Practices.

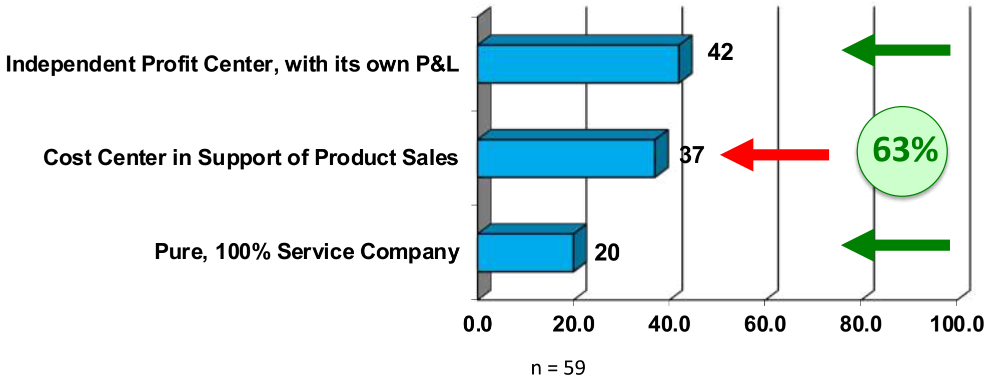
B. Continuing Evolution From Cost Center to Profit Center

The results of ***SFG℠***'s *2020 Warranty Chain Management (WCM) Benchmark Tracking Update* reveal that two-thirds (63%) of respondent organizations currently operate service as an independent profit center (or as a pure, third-party service company), compared with 37% that operate as cost centers (Figure 1).

Figure 1

Nearly Two Thirds (63%) of Respondent FSOs Now Run Their Services Operations as Profit Centers – But, More than One-Third (37%) Do Not

(Percent Response)



At these percentages, the warranty management respondent base represented in the survey reflects a consistency over the past few years and, as such, mirrors the overall composition of the global warranty services marketplace. It is noted, however, that the results for the same question asked in ***SFG℠***'s *Field Service Management (FSM) Benchmark Tracking Update* reflect a much higher percentage at 73%.

The percentage of organizations running service as an independent profit center may also vary – sometimes significantly – from one category or industry segment to another. For example, the percentage increases to 74% for those operating as profit centers among Field Service Organizations (FSOs) with the highest customer satisfaction ratings (i.e., those that are attaining at least 90% customer satisfaction).

In any event, the year-to-year tracking of this metric clearly shows that the percentage of Warranty Management organizations running as profit centers is continuing to increase, and will most likely approach the 70% threshold within the next year or two – if not sooner. Why is this important? Because it reflects that the warranty services market, as a whole, has been finding that running the organization as a profit center helps to prioritize service as a key contributor to both the company's customer satisfaction performance and its bottom line – as well as increasing the importance of management accountability.

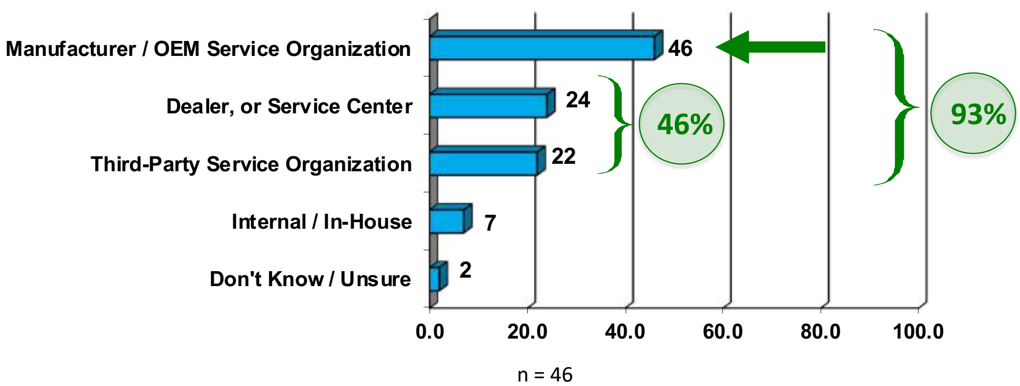
C. Principal Entities Performing the Warranty Service

Not quite half (46%) of warranty service-related repairs/replacements are performed directly by the manufacturer/OEM, according to the survey respondents. Another 46% of repairs/replacements are performed by dealers, service centers or third-party services organizations; while only 7% are performed internally or in-house (Figure 2).

Figure 2

Nearly Half (46%) of Warranty Service Is Performed by the Mfr./OEM; Dealer/Service Centers Account for Another Nearly Half (46%)

(Percent Response)



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As such, there are a number of potential players performing in the warranty services marketplace, each with their own processes, policies and procedures, oftentimes resulting in differing modes of getting the job done from the customers' perspectives.

Still, despite the varying ways of having a piece of equipment or part repaired and/or replaced, it is typically the manufacturer/OEM that represents the strongest face in the market, so the channels that it selects to support its warranty management services must be carefully vetted, selected, trained and certified (if applicable) and prepared to deal directly with their end-user customers.

The good news is that these channels have been used, seemingly, for time immemorial and, for the most part are generally accepted without reservation by the general marketplace. Nonetheless, if anything goes wrong along the way, most customers will ultimately find some degree of grievance with the manufacturer/OEM.

D. Repair *vs.* Replace; Customer Site *vs.* Depot

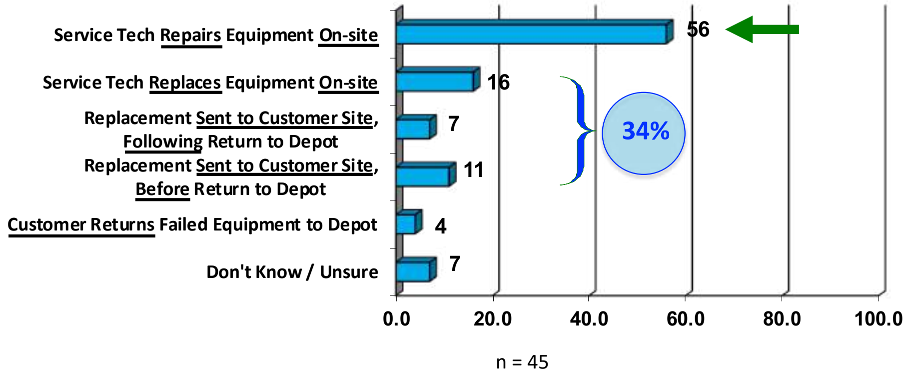
According to the survey respondents, the split between repair *vs.* replace is roughly 60% for the former, and 40% for the latter (i.e., by folding in the "don't know/unsure" responses). More specifically, just over half (56%) of respondents indicate that a service technician will repair the equipment on-site. With respect to replacements, about one-sixth (16%) of the time, a service technician will replace the equipment or part on-site.

In addition, 7% of the time, a replacement has already been sent to the customer site for the technician to install by appointment. In only 4% of the cases cited are the returns initiated directly by customers who would take or ship the failed equipment to a repair depot (Figure 3)

Figure 3

Most Frequently (56%), the Service Tech Repairs the Equipment On-Site; However, in a Third of the Cases (34%), the Equipment/Part Is Replaced

(Percent Response)



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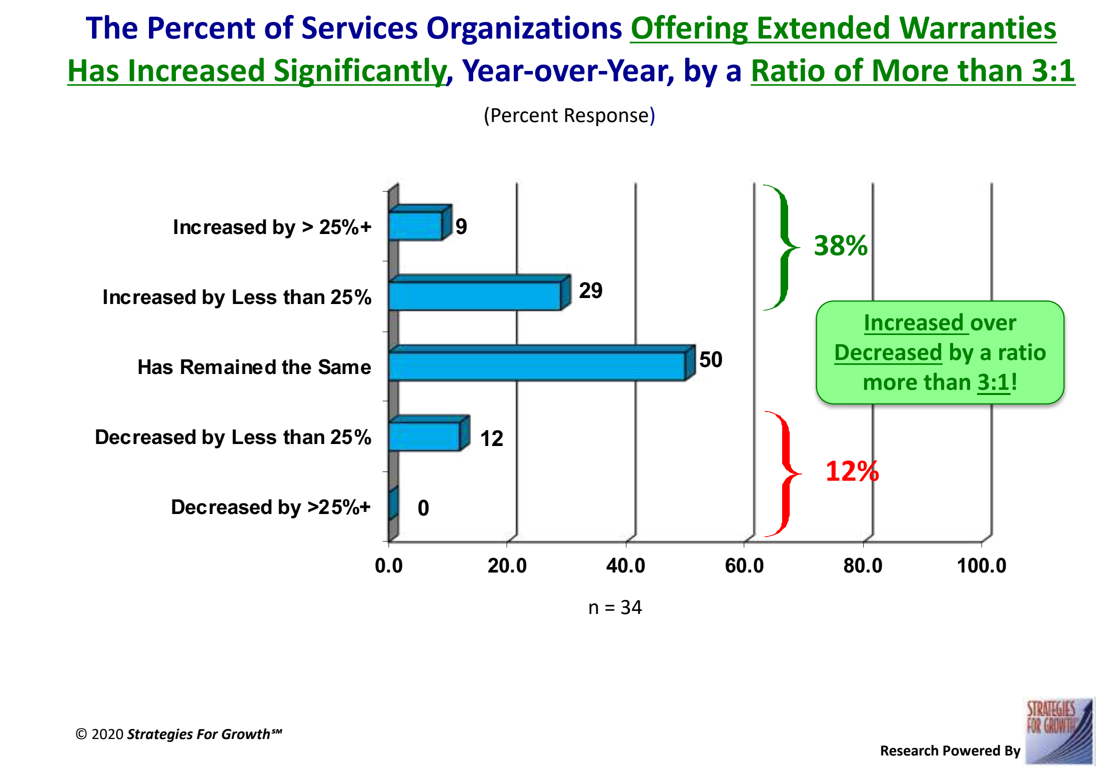
Again, these percentages reflect the typical distribution that may be expected in dealing with warranty-related repairs/replacements in support of the general services segment

E. Annual Warranty Budgets Are Expected to Continue to Increase

The survey results reveal that nearly two-thirds (63%) of respondents currently offer an extended warranty agreement or service contract to their respective customers. This percent would actually increase to near three-quarters (i.e., ±73%) when reallocating the "don't know/unsure" responses into the "yes/no" categories.

Overall, there appears to be a significant anticipated uptick in the percent of services organizations that expect to increase their extended warranty offerings over the next 12 months (i.e., throughout 2020, albeit with some disruption emanating from the COVID-19 pandemic). In fact, more than a third of respondent services organizations (38%) expect their extended warranty portfolios to expand in 2020, with nearly one-in-ten (9%) anticipating increases of greater than 25% (Figure 4).

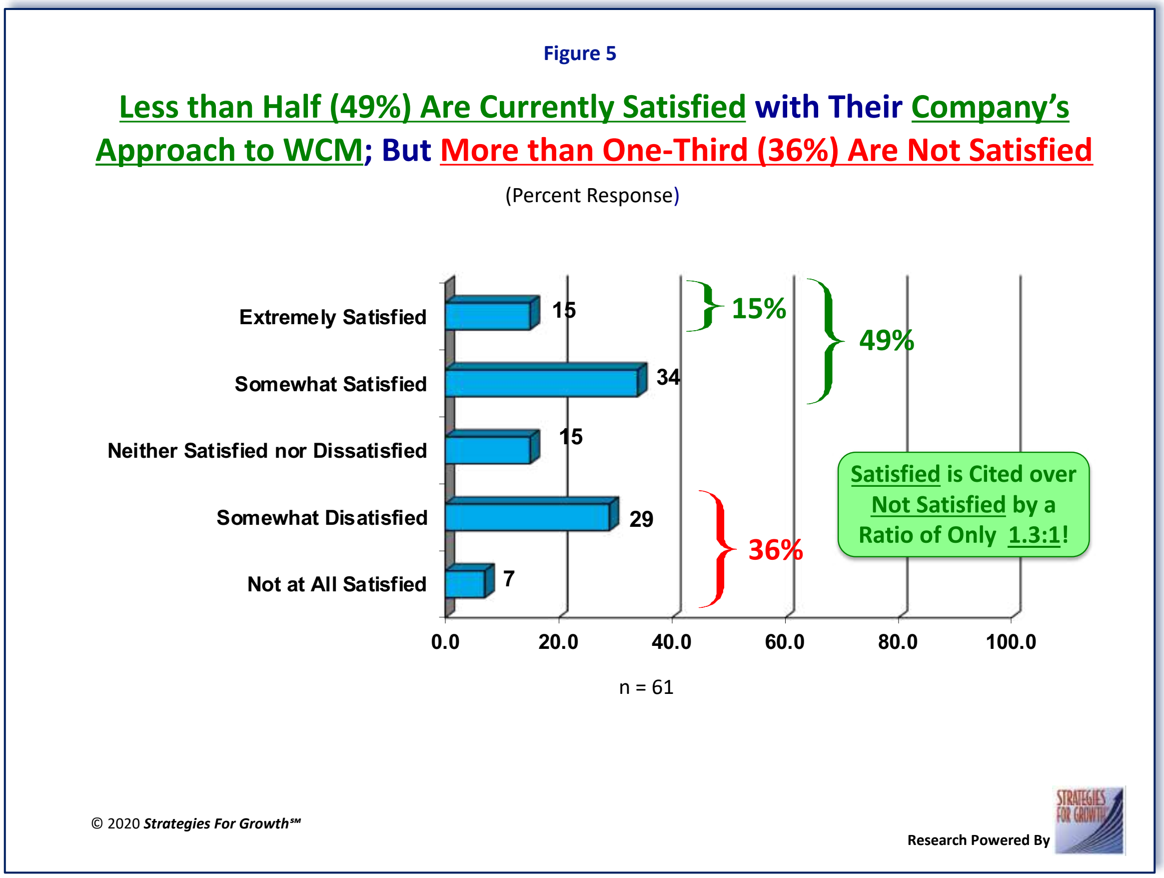
Figure 4



As such, with more than three times as many respondent organizations expecting to increase their extended warranty portfolio over those planning to decrease, the warranty chain management segment appears poised to deal with a growing market – and a commensurately large extended warranty business – as part of their overall warranty management services in the coming year.

F. Satisfaction with the Organization's Approach to Warranty Chain Management

Less than half (49%) of respondents are currently satisfied with their company's approach to warranty management; however, this is a "soft" satisfaction as more than one-third of this percent are only "somewhat satisfied", rather than ""extremely satisfied" (i.e., 15%, or only one-in six"). In fact, more than one-third (36%) of respondents are at least "somewhat dissatisfied" with their company's current approach. (Figure 5).



Percentages can often be misleading, so it is important to be able to read between the lines with respect to the overall picture. For example, with 36% of respondents citing "dissatisfied", plus 15% citing "neither satisfied nor dissatisfied", the net result is that a majority of 51% is – at the very best – either dissatisfied or simply complacent with respect to their company's approach.

As such, this suggests a very weak current approach to warranty management by a majority of companies, reflecting a significant vulnerability to switching warranty management solution providers and/or their solutions and, ultimately, looking for new vendors, new solutions and newer ways to manage their warranty portfolio.

In reviewing the results of other satisfaction/dissatisfaction survey questions, the ratio of "satisfieds" to "dissatisfieds" is typically in the 2:1 to 3:1 range. However, in this case, the net ratio is only 1.3:1, reflecting a very complacent and underwhelmed respondent base.

G. Planned Strategic Actions to Be Taken by Warranty Management Organizations

Based both on the survey findings and ***SFG℠***'s ongoing research, it is not surprising to find that the global warranty management community recognizes that it will need to restructure/update existing warranty pricing schedules (34%); develop/improve metrics, or Key Performance Indicators (KPIs) for advanced warranty chain analytics (31%); institute/enforce process workflow improvements for supplier cost recovery (31%); and purchase and/or upgrade an automated warranty management solution (31%). In fact, these represent the top four strategic actions presently being taken by the global warranty management community (Figure 6).

Figure 6

Top Strategic Actions Being Planned by FSOs Are to Restructure/Update Warranty Pricing, Improve Analytics/Workflow & Acquire a WCM Solution

(Percent Response)

- **34%** Restructure/Update Existing Warranty Pricing Schedule
- **31%** Develop/Improve Metrics, or KPIs for Advanced Warranty Chain Analytics
- **31%** Institute/Enforce Process Workflow Improvements for Supplier Cost Recovery
- **31%** Purchase and/or Upgrade an Automated Warranty Chain Management Solution
- **29%** Restructure for Improved Warranty Management Oversight & Accountability
- **23%** Improve Warranty Management-related Planning and Forecasting Activities
- **23%** Implement a Claims Review Process to Curb Fraudulent Claims
- **20%** Streamline Parts Return Process to Improve Overall Efficiency
- **20%** Provide Additional Training to Extended Warranty Sales Personnel
- **14%** Outsource some, or all, Warranty Management Activities to Third Parties
- **0%** Foster a Closer Working Collaboration Between Product Design & Service

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Other planned strategic actions cited as currently being in place among global FSOs include restructuring for improved warranty management oversight and accountability (29%); and improving warranty management-related planning and forecasting activities and implementing a claims review process to curb fraudulent claims (each at 23%).

All told, these planned strategic actions reflect a global warranty management community that already has a good understanding of the importance of pricing, tracking, planning and forecasting – and recognizes that they will still need to improve these, and other, key processes in order to both bolster the bottom line and keep up with customer expectations.

Also, undoubtedly, these percentages would have been much higher were it not for the fact that a majority of services organizations have already taken these strategic actions in recent years. However, what will likely serve as the greatest differentiators with respect to FSOs in the future are the strategic actions that that are now being planned for implementation over the next 12 months or more.

H. Empowering the Organization with Real-time, Online Capabilities

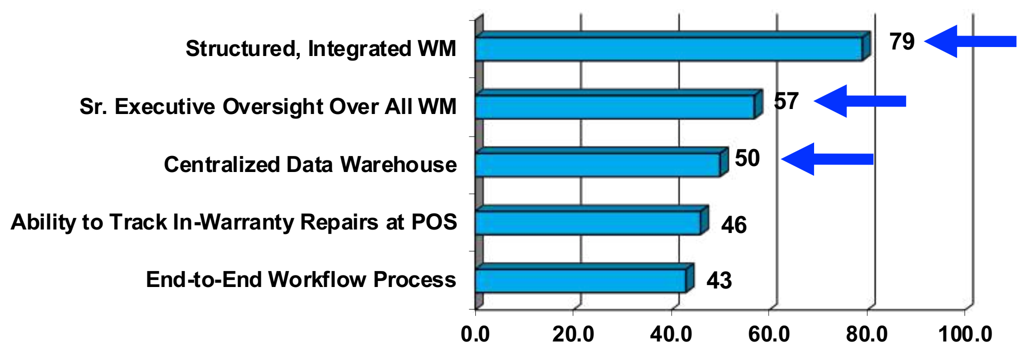
The survey findings also show that FSOs aspiring to attain Best Practices service delivery performance do not merely look at outcomes, like improving the bottom line, or increasing customer satisfaction; they also look at ways in which to identify the root causes of major problems and leverage process improvement opportunities through the implementation of effective processes, policies and procedures to support their resources both in the field and in the front and back offices that support them.

For example, a greater than three-quarters majority (79%) of FSOs currently have a structured, integrated warranty management process already in place, with an additional majority reporting senior executive oversight over all warranty management activities (57%), and a centralized data warehouse (50%) (Figure 7).

Figure 7

The Top WM Capabilities Currently in Place include Structured/Integrated Management, Executive Oversight & Centralized Data Warehouse

(Percent Response)



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Just under half also provide the ability to track in-warranty repairs at the point-of-service (POS) (46%), and an end-to-end workflow process (43%). These percents represent a significant increase in capabilities as reported just a year earlier.

I. Most Commonly Used Technology Applications

The most common technologies currently being used by services organizations are Customer Relationship Management (CRM) (83%), Enterprise Resource Planning (ERP) (69%), a Field Service Management solution (FSM) (59%), Spare Parts/Inventory Management (55%) and Warranty Management (52%) (Figure 8). It is noted, however, that this is the first time Warranty Management has been cited by more than half of respondents in the six years we have been conducting this survey.

Figure 8

The Most Common Technology Solutions Currently Being Used by Services Organizations Include CRM, ERP, FSM & SP/IM; Only Half (52%) Use WM

(Percent Response)

- **83%** Customer Relationship Management (CRM)
- **69%** Enterprise Resource Planning (ERP)
- **59%** Field Service Management (FSM) solution
- **55%** Spare Parts / Inventory Management
- **52%** **Warranty Management**

- **48%** Service Forecasting and Planning Application
- **45%** Contract Management
- **38%** Business Intelligence / Analytics
- **34%** Enterprise Asset Management System (EAMS)
- **31%** Remote Asset Monitoring / Management
- **31%** Knowledge Management (KM) Application
- **28%** Product Lifecycle Management (PLM)
- **28%** Service Lifecycle Management (SLM)

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Contract Management, cited by 45% of respondents, is also at a survey response high over the past six years, reflecting a significant uptick in the importance of warranty/contract management throughout the global services organization community.

It is also noted that warranty management organizations place as much importance on the application of Product Lifecycle Management (PLM) as they do Service Lifecycle Management (SLM) suggesting a closer working relationship between the manufacturing/production divisions of respondents' companies with the services divisions.

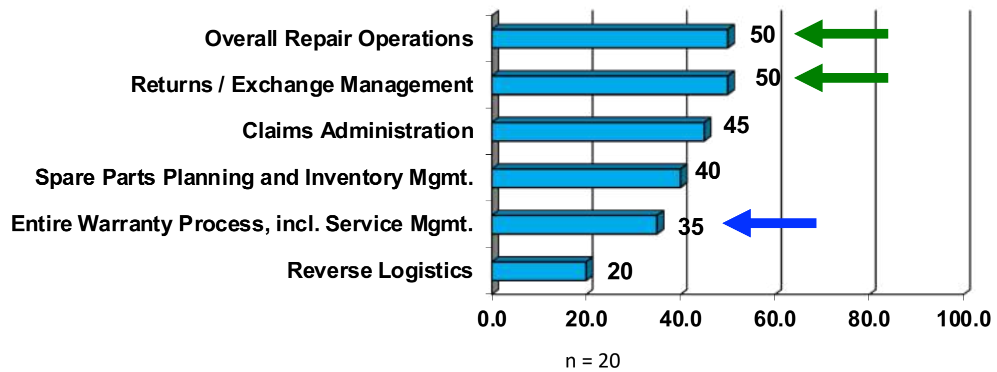
J. Current Use of Outsourced Warranty Management Services

Since roughly two-thirds (65%) of organizations currently manage at least some portion of their extended warranty portfolio in-house (with 35% outsourcing the entire warranty process, including service management), it becomes incumbent to ensure that they have the most effective tools, resources and partner relationship available to maximize the impact that sales of extended warranties can bring to the bottom line (Figure 9).

Figure 9

Half of Respondents (50%) Outsource Their Repairs & Returns/Exchanges; Just Over One-Third (35%) Outsource the Entire Warranty Process

(Percent Response)



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If outsourcing at all, the most common activities currently being outsourced are overall repair operations (50%) and returns/exchange management (50%). Other warranty management activities currently being outsourced include claims administration (45%), spare parts planning and inventory management (40%) and reverse logistics (20%).

It is noted that the more than one-third (i.e., 35%) currently outsourcing the entire warranty process reflect the highest percent for this particular category in the six years we have been conducting this tracking survey.

K. Primary Evaluation Factors for Selecting an Outsourced WM Provider

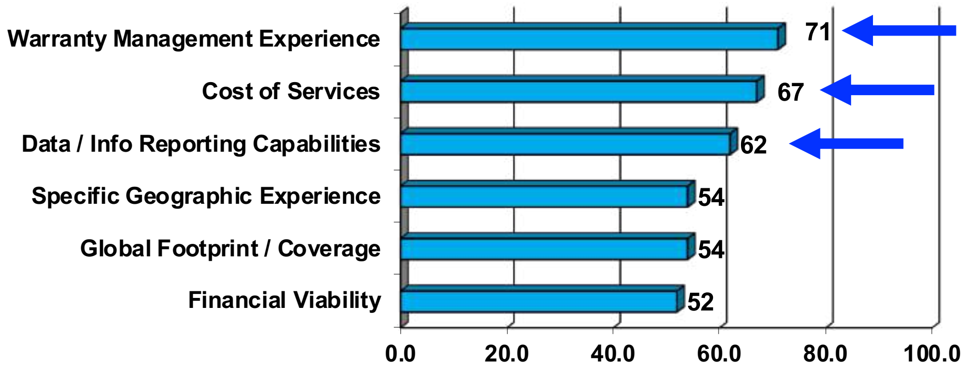
When considering the use of an outsourced warranty management provider, the top three evaluation factors are (Figure 10):

- **71%** Warranty management experience
- **67%** Cost of services
- **62%** Data/information reporting capabilities

Figure 10

When Evaluating Outsourced Support, WM Experience Is Most Important, Followed by Cost of Services and Data/Information Reporting Capabilities

(Percent Response)



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As such, it is clear that services organizations prefer warranty management solution providers that (1) have the necessary industry experience and proven track record; (2) are deemed to be cost-effective (i.e., in terms of ROI, etc.); and (3) are able to compile, process and share the results of the organization's warranty management activities in terms of strong data and information reporting (and accessibility). Other key determining factors include specific geographic experience (54%), a global footprint/coverage (54%) and financial viability (52%).

Overall, these are the five main factors that a majority of respondent organizations look for when evaluating and choosing an outsourced warranty management provider.

L. Primary KPIs Used to Measure Warranty Management Performance

The survey findings reveal that there are basically five warranty management service performance metrics, or KPIs, presently being used by a majority (or near majority) of the respondent organizations that participated in ***SFG*℠**'s *Warranty Chain Management Benchmark Survey* (Figure 11). They include:

- **72%** Customer Satisfaction (cited by **56%** as their number one KPI)
- **72%** Total Warranty Costs (cited by **17%** as their number one KPI)
- **72%** Analysis Cycle Time (cited by **11%** as their number one KPI)
- **56%** Claims Processing Time (not cited as a number one KPI)
- **48%** Warranty Costs, per Product (cited by **6%** as their number one KPI)

Figure 11

The Primary Key Performance Indicators (KPIs) Currently Being Used by Warranty Management Organizations Begin with Customer Satisfaction

(Percent Response)

- **72%** Customer Satisfaction
- **72%** Product Failure Rate
- **72%** Total Warranty Costs
- **56%** Claims Processing Time
- **48%** Warranty Costs, Per Product
- **44%** Warranty Incidents, Per Product
- **44%** In-Warranty Product Return Rate
- **40%** Claims Processing Costs
- **36%** Total Revenues from Extended Warranty Sales
- **32%** Analysis Cycle Time
- **28%** Time from Defect Detection to Correction
- **28%** Warranty Reserve Variation
- **24%** Supplier Recovery Rate
- **20%** Re-imbursement Cycle time (i.e., from Suppliers)
- **12%** Time from Product Sale to Defect Detection

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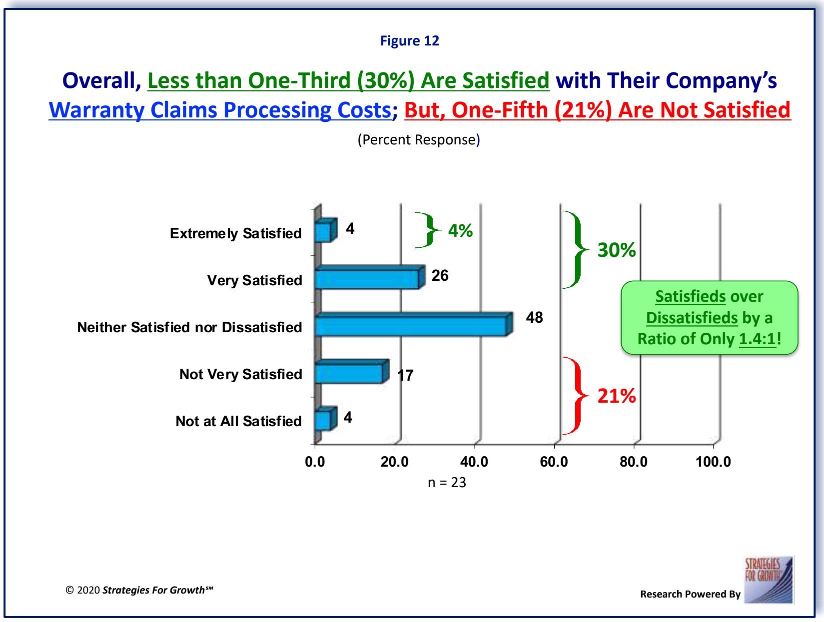
However, using the right mix of KPIs to measure field service performance is only half the battle – the other half, of course, is to attain high levels of performance when those metrics are applied to the organization's actual service delivery performance. This is where the survey results seemingly portray a reasonably high level of performance ratings across all field service management segments; however, there are many – in fact, too many – individual organizations that are not quite performing anywhere near as well.

Thus, from the survey data, the most commonly used warranty management KPIs tend to focus primarily on customer satisfaction and the costs of performing warranty management operations.

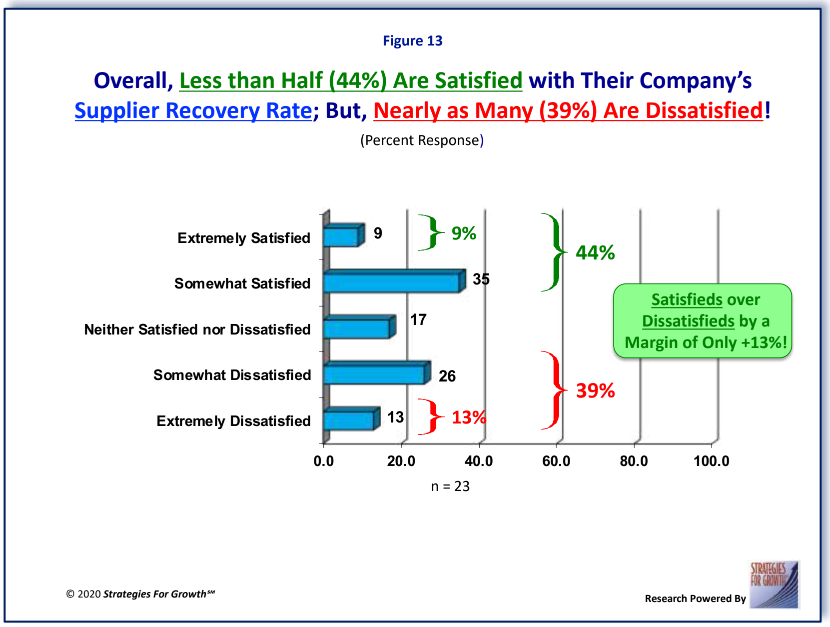
M. Key Year-over-Year KPI Measurement Performance Trends

When asked whether specific KPI values at their respective organizations have increased, remained the same, or decreased over the previous 12-month period, a majority of respondent organizations cite positive growth over that period. For example, while 30% of respondents are satisfied with respect to warranty claims processing costs, only 21% are dissatisfied – a modestly positive ratio of 1.4:1 of satisfieds-over-dissatisfieds (Figure 12).



For example, while 30% of respondents are satisfied with respect to warranty claims processing costs, only 21% are dissatisfied – a modestly positive ratio of 1.4:1 of satisfieds-over-dissatisfieds (Figure 12).

Similarly, while 44% cite year-over-year satisfaction with respect to supplier recovery rate, only 39% cite dissatisfaction – a small margin of roughly +13% with respect to satisfieds-over-dissatisfieds (Figure 13).



All in all, these metrics are somewhat muted from previous years' tracking surveys; however, while reflecting somewhat of a downtick from previous years, satisfaction levels still exceed dissatisfaction levels – although much improvement is required to boost the existing ratios.

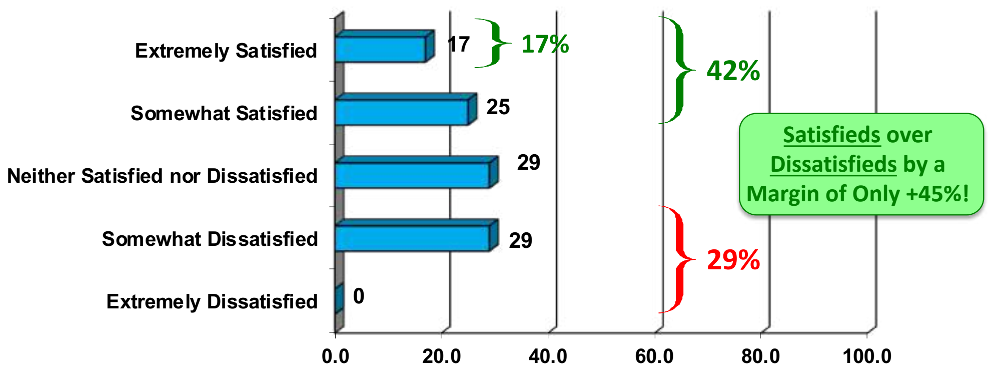
N. Satisfaction with The Performance of Their Primary WM Services Provider

Despite the high levels of the recognized importance of warranty management, less than half of respondents (42%) claim to be at least "somewhat satisfied" with their current warranty management solution provider – and only a stunningly low 17% (or only one-in-six) claim to be "extremely satisfied". In fact, the plurality of respondents (29%) appear to be fairly complacent (i.e., "neither satisfied nor dissatisfied") with the performance of their primary provider. The most telling statistic, however, is that more than one quarter (29%) are "somewhat dissatisfied" (Figure 14).

Figure 14

Overall, Less than Half of Users (42%) Are Presently Satisfied with their Primary WM Vendor; But, More than One-Quarter (29%) Are Dissatisfied!

(Percent Response)



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Some users may be unhappy with their current provider because their needs for this year and beyond are simply no longer being met by the warranty management solutions that may have been implemented a number of years earlier – that their current needs have "raised the bar" regarding what they now expect out of their solutions. This may be due to the fact that, in many cases, their vendors have not raised their own bars in terms of performance delivery. For others, the vendor-supplied solution may simply not be delivering the expected value, or the vendor is either unable or unwilling to help with consulting or professional services support – or is not able to provide other types of customer-specific support.

Related ***SFG***℠ research shows that a majority (i.e., 50% or greater) of the dissatisfaction that users have with their current Warranty Management solution vendors apparently stems from the importance that the market places on key factors including warranty management experience, cost of services, data/ information reporting capabilities, specific geographic experience and the global footprint/coverage of the vendor.

O. Summary and Key Takeaways

The key takeaways from ***SFG℠***'s annual *Warranty Chain Management Benchmark Tracking Survey* are:

- Nearly two-thirds (63%) of respondent FSOs are currently running their services operations as profit centers, rather than as cost centers (37%)
- Less than half (46%) of warranty service-related repairs/replacements are performed directly by the manufacturer/OEM, with another 46% of repairs/replacements are performed by dealers, service centers or third-party services organizations. As such, there are a number of potential players performing in the warranty services marketplace, each with their own processes, policies and procedures, oftentimes resulting in differing modes of getting the job done from the customers' perspectives.
- The split between repair *vs.* replace is roughly 60% for the former, and 40% for the latter. More specifically, just over half (56%) of respondents indicate that a service technician will repair the equipment on-site.
- Nearly two-thirds (63%) of respondent companies currently offer an extended warranty agreement or service contract to their respective customers. In addition, roughly three times as many respondent organizations expect to increase their extended warranty portfolio in the next 12 months over those planning to decrease, as a result of a significantly growing market.
- The global warranty management community recognizes that it will need to restructure/update existing warranty pricing schedules; develop/improve metrics, or Key Performance Indicators (KPIs) for advanced warranty chain analytics; institute/enforce process workflow improvements for supplier cost recovery; and purchase and/or upgrade an automated warranty management solution.
- Services organizations aspiring to attain Best Practices warranty management performance do not merely look at outcomes, like improving the bottom line, or increasing customer satisfaction; they also look at specific ways to improve their respective processes, policies and procedures to support their resources both in the field and in the front and back offices that support them.
- The most common technologies currently being used by services organizations are Customer Relationship Management (CRM), Enterprise Resource Planning (ERP), a Field Service Management solution (FSM), Spare Parts/Inventory Management, and Warranty Management (52%) (Note: this is the first time Warranty Management has been cited by more than half of respondents in our annual surveys).
- FSOs prefer warranty management solution providers that (1) have the necessary industry experience and proven track record; (2) are deemed to be cost-effective (i.e., in terms of ROI, etc.); and (3) are able to compile, process and share the results of the organization's warranty management activities in terms of strong data and information reporting (and accessibility).
- The primary warranty KPIs currently being measured by FSOs are Customer Satisfaction, Total Warranty Costs and Analysis Cycle Time.
- Less than half of services organizations are currently satisfied with their primary warranty management solution provider; however, even more are either "complacent" or straight-out dissatisfied.

There is no getting around it – if your warranty management organization finds itself behind the curve with respect to any of the key differentiating factors that distinguish between Best-in-Class and the "also-rans:, these gaps will likely only get larger over time – unless it considers taking steps to bolster – or replace – its existing Warranty Management solution.

About The Author

Bill Pollock is President & Principal Consulting Analyst at ***Strategies For Growth℠*** (***SFG℠***), the independent research analyst and services consulting firm he founded in 1992.

Previously, Bill served as President & Chief Research Officer (CRO) at The Service Council; Vice President & Principal Analyst, heading up Aberdeen Group's Service Management Practice; and Managing Analyst, Services Industry at Gartner.

Bill has been cited as "One of the Twenty Most Influential People in Field Service" by *Field Service News* (UK); one of the "Top 10 People Every Field Service Pro Should Follow" by *Field Service Digital*; one of Capterra's "20 Excellent Field Service Twitter Accounts"; and one of Coresystems' "Top 10 Field Service Influencers to Follow".

Bill has also had more than 350 articles, columns and features published on topics including Field Service Management (FSM), Service Lifecycle Management (SLM), Customer Relationship Management (CRM), Warranty Chain Management (WCM), Reverse Logistics, Augmented Reality (AR), the Internet of Things (IoT) and others for leading international services publications.

He writes monthly feature articles for *Field Service News*, *Field Service Digital*, *Field Technologies Online*, and *Future of Field* Service, and is a regular contributor to *Warranty Week* and other services-related publications.

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SFG℠'s thought leadership content development services include White Papers and *Analysts Take* reports; Webinars, ghost-written/published articles, data support for Infographics, guest Blogposts, expert interviews, User Group keynote presentations and development of Website content.

The original ***SFG℠*** website is now archived, and has been rebranded as www.PollockOnService.com. However, previously published articles and white papers are still accessible for download at www.s4growth.com.

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Mize is a Service Lifecycle Management company that provides a SaaS solution for durable goods manufacturers and their value chain. The company provides a Connected Customer Experience among OEMs and their end customers, dealer channels, service provider network and suppliers, connecting and managing all service lifecycle interactions, extending across Warranty, Service Plans, Support, Service Delivery, Parts, and Returns. This results in reduced operational cost, with optimized and maximized customer experience and lifetime value.

For additional information, visit [m-ize.com](m-ize.com).