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AZtech Strategies, LLC

The Channel Convergence Experts.

# Warranty Management – A Margin Enhancement Opportunity

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## Executive Summary

Over the past 12 to 18 months, Warranty Management garnered increased attention from the analyst community. A number of studies concluded that Warranty Management needs to become a strategic focus for manufacturers to reduce rapidly escalating costs and address falling customer satisfaction. These studies focused on a cross section of verticals within manufacturing including automotive, industrial manufacturing, white goods and high tech. High tech represented less than 10% of the total population surveyed. AZtech Strategies specializes in multi-channel go to market strategies for the high tech and IT professional services industries. We were intrigued by the results of the various studies, but troubled by the how the findings conflict with other supply chain and customer satisfaction studies completed over the same time period.

From December 2008 to February 2009, we embarked upon our own study of Warranty Management focusing exclusively on high tech hardware manufacturers. We set out to interview 30 manufacturers and their channel partners to understand the importance, and impact, of Warranty Management. Our findings are a study in contrasts.

Within high tech, manufacturers either view Warranty Management as a strategic component of product design or merely a break/fix function. There is very little middle ground. The majority (65%) of manufacturers interviewed viewed Warranty Management as primarily break/fix. All the manufacturers we interviewed could point to industry surveys such as the Walker Survey as well as their internal measurement metrics, showing steady increases in customer satisfaction, cost reductions (or containment) and improvements in Warranty Management efficiency. Yet less than 20% of manufacturers gave themselves  $\geq 6$ , out of a possible 10, in the overall efficiency of their Warranty Management process. On the surface, it would appear, improvements in Warranty Management would be nice to have, but aren't critical for high tech companies. And in fact, in 60% of those we interviewed, senior executives stated, with so many other things to worry about in this economic climate Warranty Management improvements sits on a back burner.

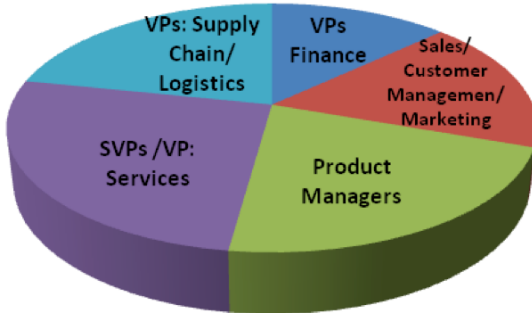
That is until they dug deeper, as did the executives of the other 40% manufacturers we interviewed. They discovered improvements in Warranty Management were the key to not only product margin preservation, but to net margin growth.

This paper is an overview of the best practices we uncovered in Warranty Management.



## Methodology

### Warranty Management Process & Practices



AZtech Strategies surveyed 30 high tech manufacturers regarding their Warranty Management process and practices. Interviews were conducted in December 2008 and February 2009. Manufacturers included, but were not limited to, the top 3-5 market share leaders in: PCs, servers, storage hardware, networking equipment, telecommunications equipment, and security devices. Within

each manufacturer, AZtech interviewed a minimum of two, often as many as four, individuals responsible for some aspect of the warranty process. Individual responses were segmented as seen in the chart. In addition, AZtech interviewed channel partners of the manufacturers who participated in the study to validate the internal view of Warranty Management against external impressions. The channel view is only anecdotal due to the small sample size.

Our research depends on open and candid conversations. Therefore AZtech does not publish the names of participating companies. In addition, we share the research only with participating companies.

Interviews lasted an average of 45 minutes and were primarily qualitative in nature to allow an in-depth discussion of the following topics:

- ▼ VIEW OF WARRANTY MANAGEMENT
- ▼ IMPORTANCE OF WARRANTY MANAGEMENT
- ▼ PERCEIVED AND/OR MEASURED IMPACT OF WARRANTY MANAGEMENT ON CUSTOMER SATISFACTION, COSTS AND MARGINS.
- ▼ COMPONENTS OF WARRANTY MANAGEMENT OUTSOURCED VS. INSOURCED
- ▼ IMPROVEMENT OPPORTUNITIES
- ▼ GREATEST CHALLENGES



## Warranty Management – a Broadening View

At first blush, Warranty Management appears to be an easily defined, narrow function. As one services vice president stated, “creating the policy for how long we ‘guarantee’ a product will work and how we fix it if it breaks in that time frame.” That same vice president went on to say, as did many others, that that overly simplistic view of Warranty Management accounted for the escalating warranty accrual costs and falling customer satisfaction they were faced with earlier in the decade. It turns out, even in manufacturers with a relatively narrow view; Warranty Management is a broad and complex business process.

With only a few exceptions, the manufacturers participating in this study started analyzing their warranty policies and services delivery strategy between 2004 and 2006. The increased attention was driven by the factors cited in the recently published studies for the manufacturing industry as a whole: escalating costs, falling customer satisfaction, market perceptions of falling product quality and lack of visibility. It is interesting that the breadth and depth of analysis across companies was relatively similar. What differentiated best practices companies was the level of senior executive attention and ability of the company to conduct an analysis of the entire process versus by function.

The result of these analyses was a broader view of Warranty Management. Just over 60% expanded their warranty management process to include not only policy design and execution of that policy, but also compliance, inventory management and planning, supplier management, financial controls and customer relationship management. The balance of manufacturers took an even more holistic view including R&D, sales and closed loop analytics. While the majority (80%) of the manufacturers interviewed agreed with the broader view, only 35% have, or plan to, implement a close looped Warranty Management process. The silo

*Everyone understands our warranty policy and how we deliver against it touches almost every function of the company, from sales to supply chain to finance to services. Unfortunately, the silo nature of our structure makes it impossible for us to see its impact across the business. We fixed many problems within each function, but I personally believe we failed on the greater mission of a gaining efficiencies across the functions.*



structure of their organizations is one barrier, the other, more daunting barrier, is the lack of executive attention.

Our very early findings seem to indicate that most manufactures have already made the majority of improvements necessary to optimize Warranty Management. Few of the senior executives we interviewed felt there were *significant* opportunities to cut costs or improve efficiency. That finding seemed logical given the recent analysis conducted by these organizations, but it felt too rosy. We made the decision to expand our interviews to include directors and managers responsible for the execution of the functions within the Warranty Management process. There we heard a very different story. Some of that is to be expected. But we were surprised at the depth of disconnect between how senior executives and line managers viewed the effectiveness of Warranty Management.

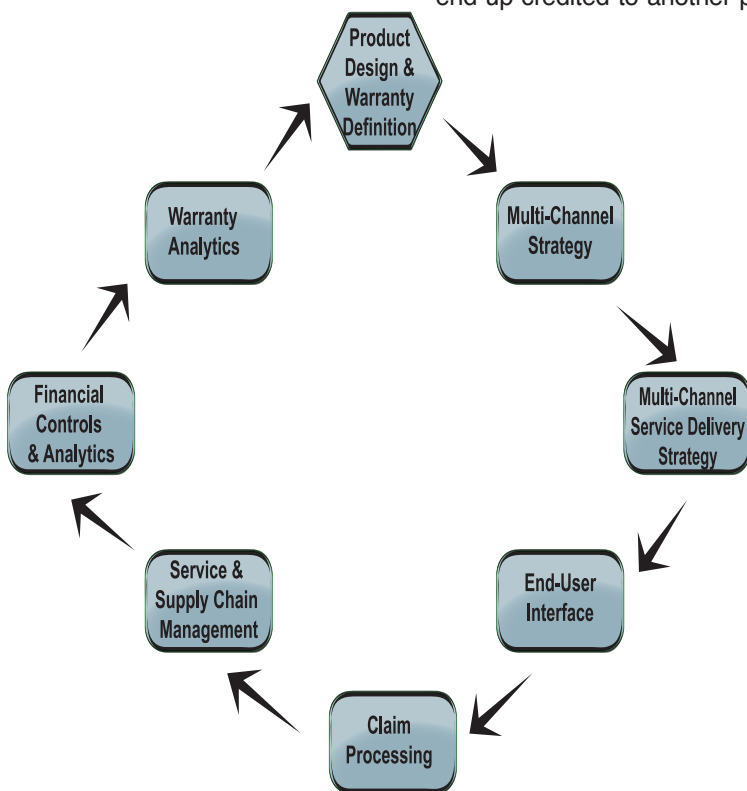
The root contributor to this disconnect relates back to the silo structure of most of the manufacturers interviewed. We discovered hard handoffs between product management, services, customer service and supply chain. In most manufacturers interviewed, because Warranty Management crosses these four and other corporate functions it ends up being owned by none. Only 20% of the manufacturers interviewed have a senior executive, with Board level visibility, in charge of Warranty Management. Almost all have a vice president, or similar level title, responsible for warranty, but they are not part of the corporate leadership team inner circle.

The secondary contributor is that Warranty Management isn't "sexy." It is viewed as "get your fingernails dirty" work. Improvements come in small percentage points and often end up credited to another part of the business. The impact of Warranty Management, due to the breadth of what it touches, is difficult to isolate. Only two of the executives we interviewed felt running Warranty Management was a career defining moment.

The combination of these two factors results in Warranty Management simply not hitting executive dashboards. Unless there is a crisis, most senior executives feel their company is doing a decent job with Warranty Management. Sure, there are improvement opportunities. But it is not a high priority function; the exception being our best practices organizations which we will discuss later.

Move to the line managers and the story is very different. Line managers, on average, gave their corporate Warranty Management process a 4-5, on a scale of 10, vs. the 7 or 8 from senior executives.

For those who live and breathe Warranty Management,



## Five Frustrations

there are five frustrations, and they are utterly consistent across all the manufacturer interviews. The level of frustration varied, but even our best practices organizations continue to struggle in these areas.

### *Supplier/Outsourcer Management*

At the line manager level, there is a tremendous frustration with suppliers/outsourcing partners. In 75% of manufacturers interviewed, line managers stated the supplier/outsourcer decision was based strictly on cost savings with little or no due diligence on ability to perform. Five of those we interviewed became so frustrated, they spent time consulting with the supplier to fix their internal processes in an attempt to drive improvements.

Call Centers are another of frustration. Over half of those we interviewed are in the process of re-evaluating the decision to outsource their call centers. Another 25% recently brought their call centers back in house. The decisions were driven by two factors: high turnover within the outsourcer and customer complaints. It is

*I'm a six sigma black belt. Honestly, I just couldn't take it anymore. I spent probably Three months dissecting our refurbishing centers operations. We were able to identify a half dozen process improvements that really helped... unfortunately, my competition uses them too, so I helped them out as well. So much for competitive advantage.*

important to point out, most did not experience an actual fall in customer satisfaction metrics, as we will discuss later.

It is also interesting to note, that often the pre-

outsourced process element was so costly that even when the suppliers fail, there is still a cost savings which in many organizations trumps process integrity.

### *Lack of Aligned Measurement Metrics*

The other frustration is that measure metrics and performance incentives drive the wrong behavior. Line managers stated outsourcing contracts seem to be cookie cutter contracts that fail to recognize nuances of their product or process. In addition, whether in-sourced or outsourced, metrics are function-specific. There is nothing to balance the metrics both within the function and across entire Warranty Management chain or even the services delivery chain. A supplier or a function can exceed expectations, but the end result is a failed process. However, the fractured nature of the process in most companies makes it difficult to recognize the breakdown, to say nothing of quantifying its impact.

*Our call center outsourcer is completely unable to follow our process...well that isn't accurate. They are unwilling because we measure them on length of calls. Therefore instead of doing proper troubleshooting, they just automatically issue an RMA for us to replace the security camera; camera gets to the refurbishing center and no problem is found. Now the business is still saving money by using them, but that doesn't mean we are reducing our warranty costs as much as we could or serving our customers well.*

### *Reverse Logistics/Redemption*

Line managers felt improving redemption had the most potential to reduce warranty costs and ultimately claims. They are frustrated by the "games being played" by suppliers to get out of warranty reimbursements. Senior executives also called out redemption as the greatest opportunity to cut costs and improve efficiency.

### Side Effects of Satisfied Customers

Line managers believe executives fail to recognize the hidden costs associated with achieving ever improving customer satisfaction metrics. Customer satisfaction is a strategic corporate performance metric for 65% of the manufacturers interviewed. More than 40% of these tie employee compensation, from senior executives to call center operators, to customer satisfaction metrics. Of these, only three, also complete an analysis of the costs associated with achieving customer satisfaction metrics. The unintended cost line item hit the hardest is warranties.

The challenge, according to these companies,

*It comes down this – if a technician keeps the customer happy, he’s not going to get in trouble. Even if that means he spent \$2000, when it should have been a \$50 transaction. As much as we try very hard to communicate the importance of managing the customer’s dissatisfaction, when all is said and done, if that customer complains, the technician ends up punished. No one is going to stand up for him and say, ‘but he saved \$1950.*

is that regardless of how balanced the business believes its metrics are customer satisfaction will trump all others. The manufacturers interviewed stated it wasn’t until margin pressures escalated due to the falling prices and increased competition that anyone considered the cost of a happy customer. The unintended costs are exponentially more expensive in a multi-channel model.

The side effect costs accumulate due to a tendency to:

- ▼ MANAGE BY EXCEPTION - WHEN MAKING THE CUSTOMER HAPPY IS THE NUMBER ONE PRIORITY, EXCEPTIONS BECOME THE RULE. NOT ONLY DOES THIS ADD COSTS TO THE INDIVIDUAL TRANSACTION IT ALSO IMPACTS THE ABILITY TO PLAN, OFTEN RESULTING IN MISALIGNED PARTS INVENTORIES.
- ▼ IGNORE THE PROCESS – CALL CENTER/ HELP DESK PERSONNEL, RATHER THAN TAKE AN IRATE CUSTOMER THROUGH LENGTHY TROUBLESHOOTING, SIMPLY SEND OUT A NEW PART OR ISSUE A FIELD DISPATCH ORDER. IN A MULTI-CHANNEL SALES MODEL, THE HELP DESK OFTEN TAKES CARE OF THE CUSTOMER EVEN THOUGH HE SHOULD BE DIRECTED BACK TO THE PARTNER WHO SOLD THE PRODUCT.

### Lost Opportunity

The frustrations discussed to this point, pale compared with the disappointment many line managers feel over the lost opportunities. Although senior executives felt Warranty Management had many improvement opportunities, in general, they felt the net gain would only be a percentage point or two. Those directly responsible for day-to-day Warranty Management feel very differently.

They cited three missed opportunities:

Almost without exception, executives and

- ▼ IMPROVE PRODUCT QUALITY AND INNOVATION
- ▼ CREATE DEEPER CUSTOMER INTIMACY
- ▼ INCREASE SERVICES REVENUE

## A Few Words About Services

Line managers agreed, upgrading, extending and renewing warranty contracts is a missed opportunity. However, it is important to understand why this fairly obvious revenue opportunity is so underutilized in high tech.

For the last decade falling product margins have driven an increased focus on services revenue. For many manufacturers, this resulted in the building of professional services organizations. Warranty services are often defined, and the revenue, until the last 2-3 years for most companies, recognized by the product group, rather than services. As a result, services often views warranty as “not our job.” In fact, 40% of manufacturers who have services organizations outsource warranty repair.

The other challenge is that warranty related services offers typically lack tie-ins to professional services. This impacts both the channel and the services organization’s motivation to drive services sales. There is no value proposition creating the migration path from warranty to professional services.

Manufacturers have the opportunity to integrate warranty services into their entire services value chain to capture a profitable revenue stream while also addressing the services cultural challenges.

In order to do so manufacturers must:

- ▼ MAP SERVICES COMPETENCIES BOTH INTERNALLY, WITH SUPPLIERS/ OUTSOURCERS AND WITH CHANNELS
- ▼ CAPTURE MARKET INTELLIGENCE TO DEVELOP TOOLS AND PROFESSIONAL/ MANAGED SERVICE OFFERINGS





▼ DEVELOP A ROADMAP FOR PROFESSIONAL SERVICES THAT BLENDS THE HIGH MARGIN WARRANTY UPSELL OPPORTUNITIES WITH SERVICES OFFERS TO KEEP CUSTOMER ENVIRONMENTS CURRENT:

- FOR EXAMPLE, INTEGRATE/OPTIMIZE LEGACY EQUIPMENT WITH NEW INFRASTRUCTURE STRATEGIES (E.G. VIRTUALIZATION OR LEVERAGE LEGACY EQUIPMENT AND THE MANUFACTURERS' MANAGED SERVICES OFFER IMPROVE CUSTOMER'S DISASTER RECOVERY STRATEGY)

▼ ENGAGE CHANNELS. ALL THE MANUFACTURERS IN THIS STUDY EMPLOY A MULTI-CHANNEL GO TO MARKET SALES STRATEGY. ONLY THREE HAVE A SIMILAR SERVICES DELIVERY STRATEGY. EVEN THEY FEEL THEY ARE MISSING SIGNIFICANT REVENUE OPPORTUNITIES.



### Moving to Best Practices


It was recognition of these missed opportunities that led our best practices companies to do the difficult work of transforming Warranty Management from break-fix to a holistic services lifecycle process. The manufacturers (30%) who could articulate a Warranty Management process, and for whom we were able to validate the health of process with channels and end customers, have a holistic and closed-loop approach to Warranty Management.

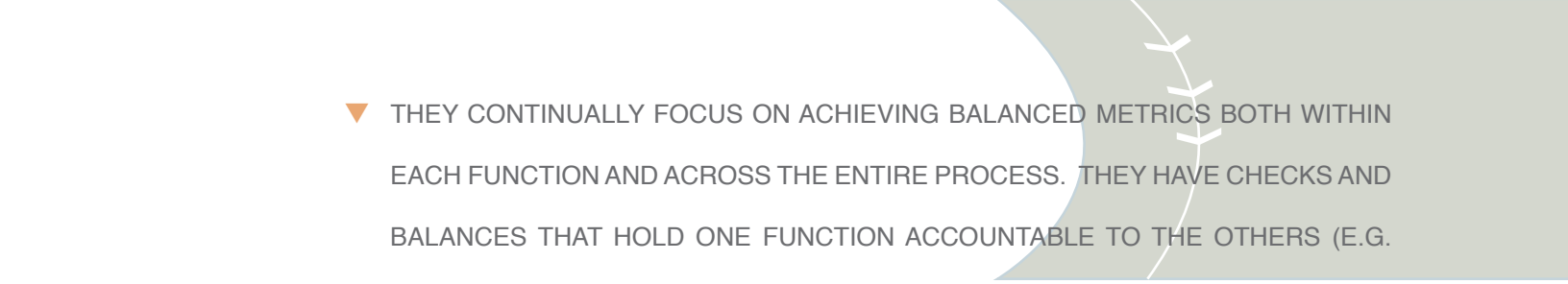
#### *They exhibit the following best practices:*

- ▼ THERE IS A CROSS FUNCTIONAL WARRANTY MANAGEMENT TEAM LED BY AN EXECUTIVE WHO, IF NOT PART OF, HAS REGULAR EXPOSURE TO THE INNER LEADERSHIP CIRCLE.
- ▼ WARRANTY MANAGEMENT BEGINS AT THE R&D/ENGINEERING STAGE. THE

FOCUS IS NOT ONLY ON PRODUCT QUALITY, BUT SERVICEABILITY. PRODUCTS ARE DESIGNED WITH SELF-DIAGNOSTIC CAPABILITIES AND THE ABILITY TO “PHONE HOME” FOR SERVICE.

- ▼ WARRANTIES ARE DESIGNED WITH A VIEW OF HOW THE PRODUCT WILL ACTUALLY BE USED. IF DIFFERENT PRODUCTS ARE COMMONLY USED TOGETHER IN THE CUSTOMER ENVIRONMENT, THE WARRANTIES ARE ALIGNED. WARRANTY POLICIES ARE DESIGNED TO MEET THE UNIQUE NEEDS OF DIFFERENT VERTICALS.

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- ▼ THEY ARE PRE-EMPTIVE. THESE COMPANIES CONTINUALLY ANALYZE SERVICE DATA AS WELL AS DATA COMING IN FROM PRODUCTS DOING THEIR OWN SELF-DIAGNOSTICS. THEY CORRELATE DATA LOOKING FOR SERVICEABILITY PATTERNS. THEY PROACTIVELY REACH OUT TO CUSTOMERS TO EITHER FIX THE PROBLEM BEFORE IT HAPPENS, OR WARN THE CUSTOMER THEY ARE PUSHING THE LIMITS OF THE PRODUCT'S DESIGN.
  
  - ▼ THEY INVEST IN TOOLS PARTICULARLY IN THE AREA OF SERVICEABILITY, ANALYTICS AND CUSTOMER PORTALS. UP UNTIL NOW THESE TOOLS HAVE BEEN SELF DEVELOPED, BUT INCREASINGLY THERE BOXED SOLUTIONS AVAILABLE.
  
  - ▼ THE SALES FORCE IS TRAINED ON THE ADVANTAGES OF THE WARRANTY POLICIES AND INCENTED TO UPSELL WARRANTIES & MAINTENANCE CONTRACTS. WARRANTY IS NOT AN AFTERTHOUGHT, BUT A COMPETITIVE SALES ADVANTAGE.
  
  - ▼ OUTSOURCING SUPPLIERS BRING STRENGTH AND EXPERTISE TO PARTICULAR FUNCTION/GEOGRAPHY AND/OR PROVIDE A BREADTH OF COVERAGE IT IS NOT COST EFFECTIVE TO ACHIEVE INTERNALLY (E.G. FEET ON THE STREET FOR ONSITE SERVICE, INTERNATIONAL DEPOT CENTERS). IN OTHER WORDS, IT IS NOT SIMPLY A COST CUTTING DECISION TO OUTSOURCE; THE PARTNERS ADD SIGNIFICANT VALUE.
  
  - ▼ THEY VALUE SERVICES. MANUFACTURERS, WHO PLACE EQUAL OR MORE VALUE ON SERVICES VS. PRODUCT REVENUE, HAVE MORE SOPHISTICATED WARRANTY MANAGEMENT PROGRAMS. THE SALES FORCE DOES NOT VIEW SERVICES AS A GIVE AWAY TO CLOSE THE PRODUCT SALE.
  
  - ▼ THEY COLLECT AND USE DATA ANALYTICS. THESE COMPANIES MOVE FAR BEYOND BASIC CUSTOMER SATISFACTION AND NUMBER OF CLAIMS DATA. THEY INVEST HEAVILY IN GATHERING ANALYTICS THAT ALLOW THEM TO IMPROVE PRODUCT QUALITY AND SERVICEABILITY WHILE REDUCING COSTS.

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- ▼ THEY CONTINUALLY FOCUS ON ACHIEVING BALANCED METRICS BOTH WITHIN EACH FUNCTION AND ACROSS THE ENTIRE PROCESS. THEY HAVE CHECKS AND BALANCES THAT HOLD ONE FUNCTION ACCOUNTABLE TO THE OTHERS (E.G. THE CALL CENTER IS REVIEWED IF ONSITE SERVICE CALLS RESOLVED IN ONE VISIT EXCEED X OR RMA'S WITH NO PROBLEM FOUND EXCEEDS X%).
  - ▼ THEY EMPOWER THE CUSTOMER. THEY HAVE WARRANTY SERVICES PORTALS TO ALLOW CUSTOMERS TO REGISTER, SELF DIAGNOSE, FILE A CLAIM, CHOOSE A SERVICES OPTION AND MONITOR STATUS.
  - ▼ IT IS A CLOSED-LOOP WITH THE INFORMATION CONTINUOUSLY CIRCULATING BETWEEN R&D, PURCHASING, MANUFACTURING, PRODUCT MANAGEMENT, CRM, SALES, SUPPLY CHAIN, SERVICES AND SUPPLIERS/OUTSOURCING PARTNERS.

## The Missing Element

All of the companies participating in the research have a multi-channel go-to-market strategy. We expected to find the more mature the multi-channel strategy; the more integrated channels were in the warranty process. Instead we found only 6 manufacturers whose channel partners gave them passing marks in warranty service.

These results were so surprising, we cross checked them against CRN's Channel Champions and VARBusiness' Annual Report Card. Our findings were consistent with their 2008 surveys. The average score of the balance of the companies interviewed in these two surveys was 65% based on a weighted importance of 1.09.

The findings become even more intriguing when viewed against our internal interviews. The manufacturers who felt they had, and were able to articulate, the strongest warranty process and the best handle on customer satisfaction have an average channel satisfaction score of 62%. It should be noted, that even though these companies scored quite low, they often led their category in the CRN and VARBusiness reports.

Manufacturers have made great improvements in the pre-sales support of partners, but as evidenced by this research, the channel has yet to become an integrated component of the services value chain.

## Conclusion

This is a missed opportunity for both the manufacturers and their channels. Warranty management, viewed holistically, is not only an opportunity to reduce costs and improve customer satisfaction, but a tool to improve product quality and drive innovation, competitive advantage and high margin service revenue. As manufacturers continue to adopt open standards the opportunities to achieve true product differentiation become smaller. Warranty Management, particularly when put in the broader context of lifecycle services, is becoming a strategic competitive differentiator. In an economic climate where prices are being forced down, Warranty Management is a critical tool for margin preservation and, more exciting, margin growth.



### **Anne Zink** *Chief Strategy Officer*

Ms. Zink has over twenty-five years experience in a variety of sales and business development positions within the high tech industry. Since founding AZtech Strategies in 1996, she worked with industry pioneers to bring emerging/disruptive technologies to market. Her client list includes industry leaders such as 3Com, Avaya, HP, Lucent, SAP and Siemens. She also helped launch development stage companies such as Vertical Communications, Varolii (formerly Par 3) and dynamicsoft (acquired by Cisco). Her work also extends to assisting global consultant/integrators such as PwC and Unisys to create and deliver new services offers to, thru and with multi-channels.

Prior to founding AZtech Strategies, she was Director of Consulting at MSI Consulting Group where she was instrumental in designing

channel strategies and programs that enabled clients to evolve from their traditional distribution strategies, usually direct sales or niche distribution, into technology channels. Clients included GTE/BBN Planet, MCI and Symbol Technologies.

Her specialization was developing channel convergence strategies for both telecommunications and technology companies, including Digital Equipment Corp, Mitel and Siemens AG. She was also instrumental in the development and launch of Compaq's Small Business Channel initiative. Finally, Ms. Zink developed U.S. market entry strategies and channel programs for Alcatel and Siemens HiNet.

Her pre-consulting career included a variety of sales, marketing and business development positions in high tech and Internet applications.

## About AZtech Strategies

**AZtech Strategies** was founded in 1997 out of a frustration with traditional consulting.

We felt the value of consulting should be more than to “simply validate” what the client already knew. Instead, our goal was to create a company that delivered new insights, uncovered emerging trends and worked with clients to develop and execute truly differentiated Multi-Channel Go to Market strategies.

Our goal is to help our clients set themselves apart by keeping their focus squarely on the Customer. We believe there is nothing more important. After all, without Customers, there is no revenue.

### We Start with Knowledge

Our team of Tele-Consultants spends thousands of hours annually having conversations with enterprise customers and their partners/suppliers. We routinely speak with C-level executives of Global 100 corporations. We continually research the challenges of small and medium businesses.

But we don't do quantitative research. Not only is it boring for everyone, it tends to confirm what you already knew. We conduct in-depth qualitative research. Our proprietary methodology delivers unparalleled insight into, not only your Customers' business, but their relationships with their customers, partners and suppliers.

### We Add Experience

Our executives bring a wealth of experience. We've lived through the transformations and strategy evolutions our clients are facing. We've owned

the P &L and our own businesses. We understand accountability as only a business owner can. We've learned to anticipate the hidden pitfalls to help our clients avoid unforeseen consequences. We've fought the internal battles. We've learned that business transformation requires *both* an external and internal focus. We know how to get from a PowerPoint deck to execution efficiently.

### We Highlight the Core Messages

Our deliverables and recommendations are direct and in plain English. We don't believe in mind numbing deliverables. The market is exciting and dynamic. Our work reflects that.

### We Tell It Like It Is

We have no qualms pointing out weaknesses in strategy or execution. If our customer research says clients are making a mistake or missing an opportunity, we are passionate about driving change.

### We Do Real Work

We don't believe in leaving clients with a binder of charts and graphs. We believe the act of developing our recommendations puts us in an ideal position to help execute them. In today's world of limited resources we believe it is our responsibility to help clients streamline execution by pitching in to get the work done. Whether that means socializing the strategy to gain alignment or implementing a sales force automation tool, our team becomes an extension of your team.

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AZtech Strategies, LLC

**The Channel Convergence Experts.**