

**OSF** | DIGITAL

**THE WAREHOUSE GROUP**



# EVOLVING THE WAREHOUSE GROUP'S CUSTOMER SERVICE

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# ABOUT THE WAREHOUSE GROUP

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## THE WAREHOUSE GROUP

The Warehouse Group was founded in 1982 and is one of New Zealand's largest retail groups, employing over 11,000 people. The company helps provide the best general merchandise, apparel, technology, and more to customers and commercial businesses.



# TWG'S SITUATION

Enriching a multicloud Salesforce system to improve customer service

TWG wanted to book service technicians for customers via different channels, regardless of location.

Salesforce supports many of the TWG brands.  
OSF and TWG's trustful partnership started in 2018.



**The Warehouse** relies on Salesforce Commerce Cloud, CRM, SPF, Live Agent, and Marketing Cloud.



**Warehouse Stationery** uses Salesforce Commerce Cloud, CRM, Web to Lead, Live Agent, and Marketing.



**Noel Leeming** has Ecommerce Cart Functionality, Salesforce CRM, SPF, Marketing Cloud, and Adobe Experience Manager as a CMS.

# TWG'S CHALLENGES

TWG needed to improve customer service with a reliable solution

With complex background processes, TWG needed connected services and improved delivery journeys for their customers.

1

## Improve sales conversion

TWG needed better visibility of the sales pipeline. Providing quotes and following up were difficult, leading to missed opportunities and lost sales.

2

## Standardize processes

TWG wanted to increase the visibility of available resources. The commute time for each job had to be more accurate, and different departments needed visibility within the operation.

3

## Support customers and grow sales

Scheduling processes needed to be optimized to ensure seamless and efficient customer journeys. TWG required a structured and proactive approach for timely appointments.

4

## Reduce time and effort

TWG wanted to improve resource management for bookings. They needed to streamline processes to generate accurate and complete reports for an effective workload.

5

## Optimize booking system

TWG required efficiency and clarity across teams. They needed data validation measures to rely on better customer and employee experiences.

# OSF & TWG PARTNERSHIP

Connecting TWG consultants and customers for improved journeys

**OSF worked collaboratively with TWG and Salesforce technical and product teams to put customers at the core of the business, boost productivity, and simplify internal processes.**

TWG's extended and complex offering requires them to consult and assess the needs of each client. Each Service solution needed to include:

- ✓ A free consultation (in person or via remote video conference).
- ✓ Installation at the customer's home.
- ✓ Field service management with a dedicated team.

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OSF Digital worked as **#OneTeam** with TWG and Salesforce to deploy the group's booking solution, streamline processes, and roll out the Field Services solution to The Warehouse, Warehouse Stationery, and Noel Leeming.

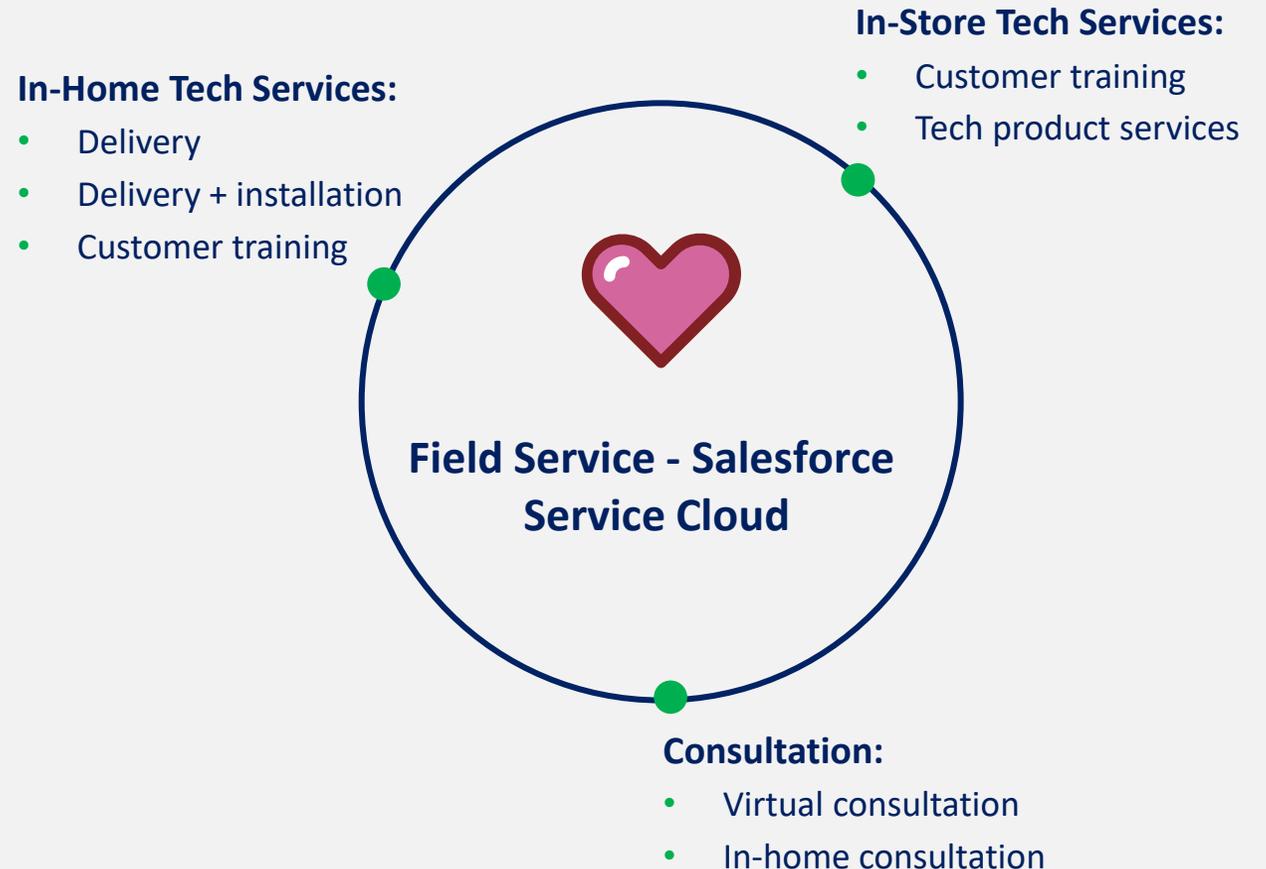
# OSF & TWG PARTNERSHIP

Empowering TWG service teams to better support customers

With the new Service solution, TWG's customers are supported from the moment they engage on the website, via call, or in the shop—from purchase to delivery to installation.

Implementation followed an agile and collaborative delivery model, with shared TWG and OSF resources:

- Implemented Salesforce Field Service Management by Service Cloud to handle the booking solution for TWG.
- Evolved TWG's logistic solutions, empowering the group to meet the customers where they are: in-store or at home.



# OSF & TWG PARTNERSHIP

Deploying a customer-centric booking solution

TWG can now deliver the intended service to a specific location by assigning the right resource at a specific time.

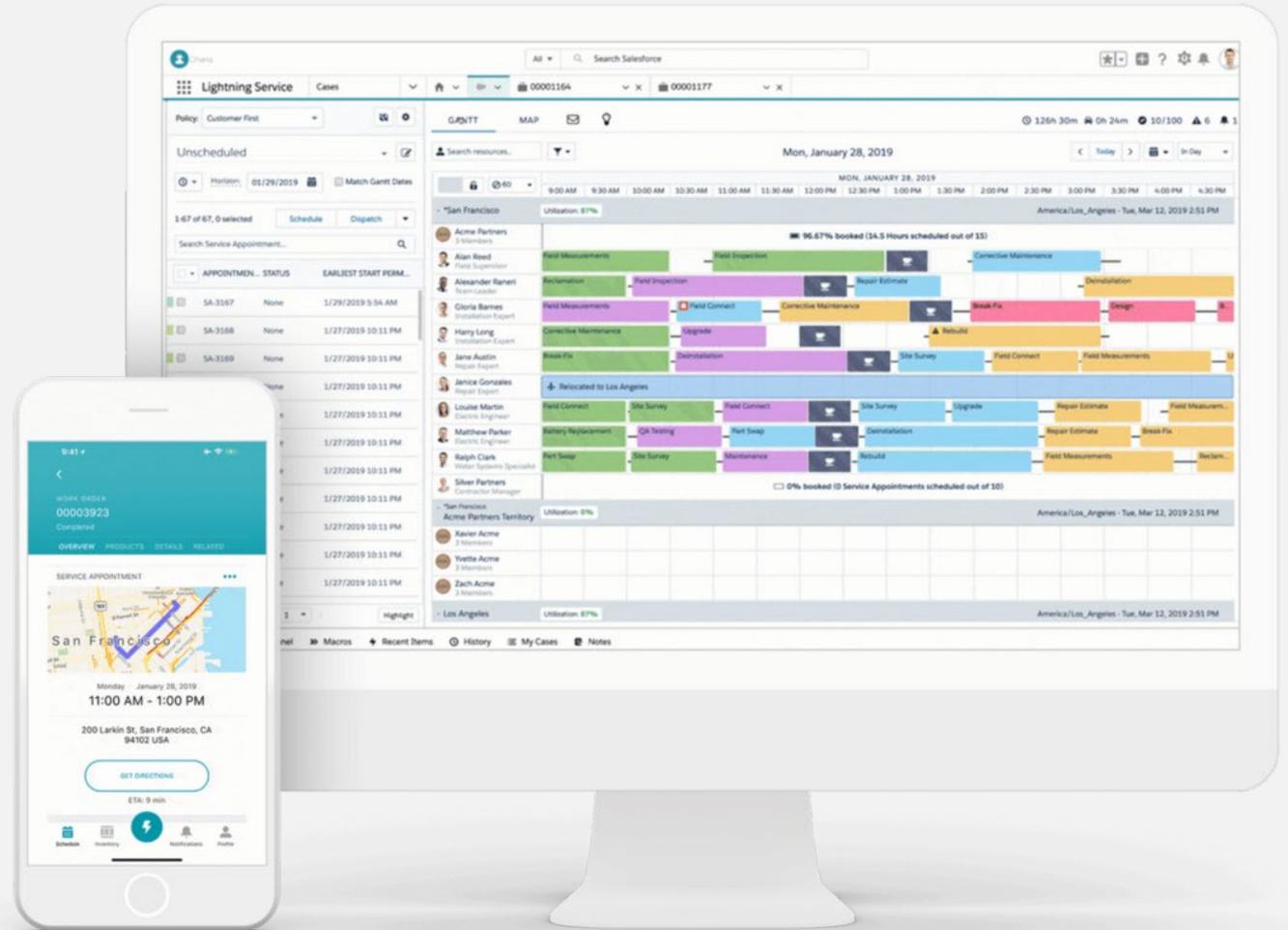
What is the job and what skills are required?

What is the address?

Which service territory and who can cover the task?

Who has the skills?

Who is available?



# OSF & TWG PARTNERSHIP

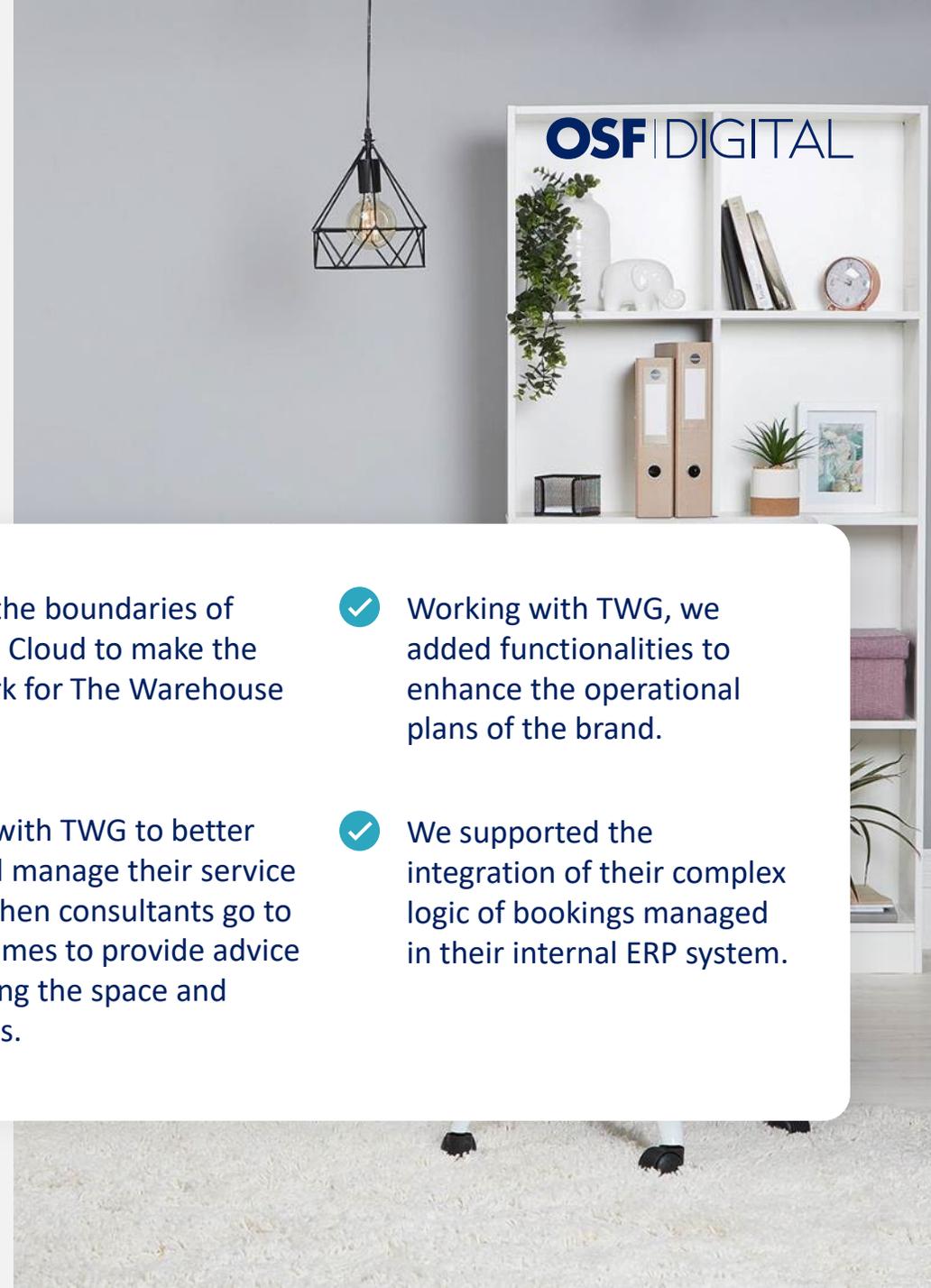
Handling the unique challenges of the New Zealand market

OSF Digital supported TWG to offer the best solutions for customers who request **in-home** assessments and services, solving the region's specific requirements.

- Since the country has an uneven distribution of population, TWG must provide full-time technicians in some areas, while in other regions with less population, no budgeting is allocated.
- With specialists being shared from one region to another, the group needed to improve staff management and on-spot booking.
- With the In-Home Solution, TWG's service teams are better organized, from technician allocation to delivery.

- ✓ We pushed the boundaries of Field Service Cloud to make the solution work for The Warehouse Group.
- ✓ We worked with TWG to better organize and manage their service workforce when consultants go to customer homes to provide advice after assessing the space and requirements.

- ✓ Working with TWG, we added functionalities to enhance the operational plans of the brand.
- ✓ We supported the integration of their complex logic of bookings managed in their internal ERP system.



# OSF & TWG PARTNERSHIP

Delivering comprehensive services

Booking on platform

Dispatchers can book, reschedule, and cancel customer jobs.

Third-party booking portal

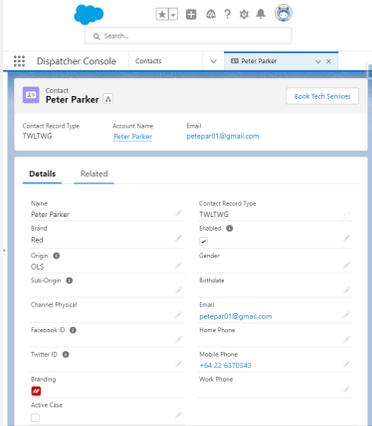
Third-party users logged into the portal can book, reschedule, and cancel customer jobs.

Booking via POS

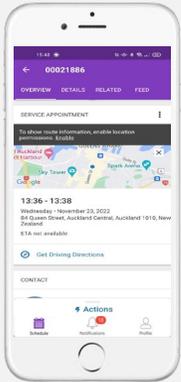
Salespeople at stores can make bookings for customers.

In-home

Booking tech service, from booking to dispatch (Gantt) to fulfillment (mobile).



Booking team / POS / Partners



Technicians



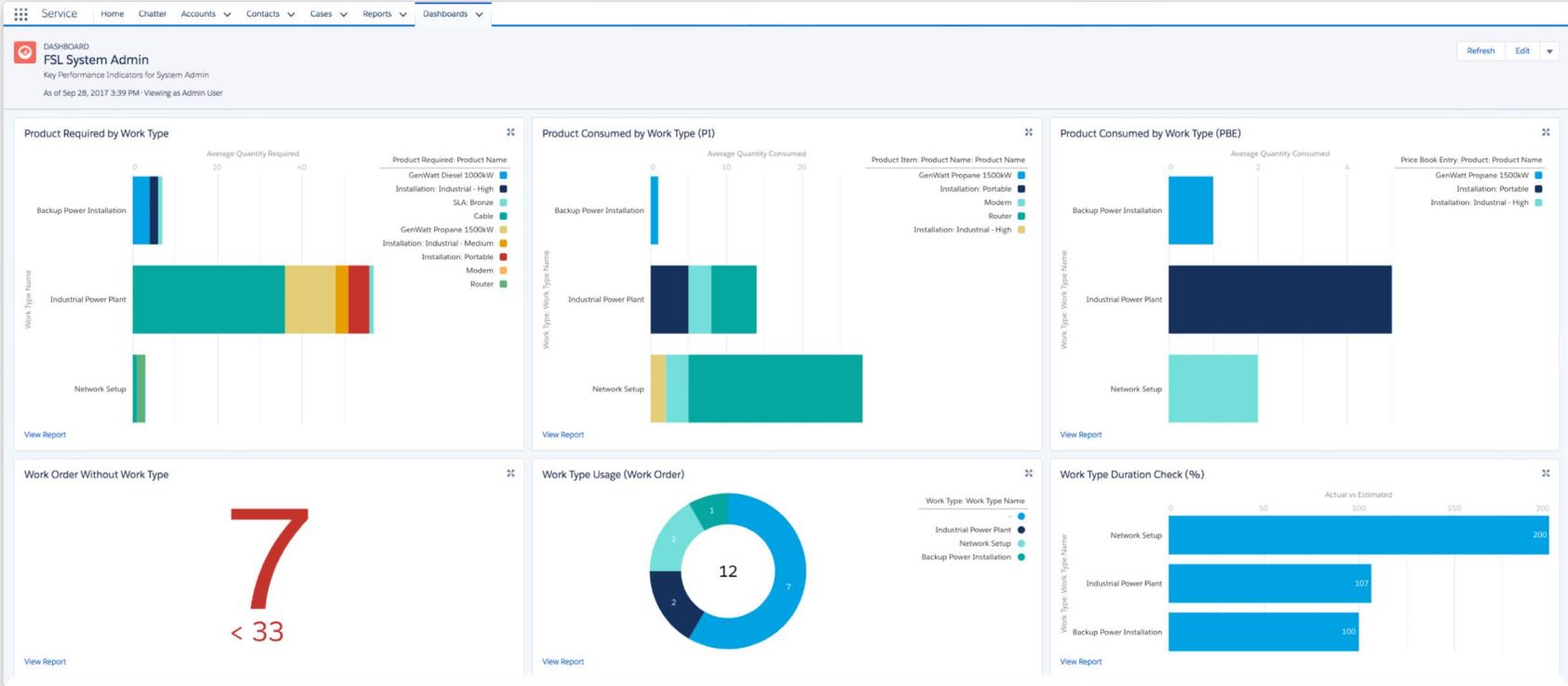
Dispatchers

# OSF & TWG PARTNERSHIP

A solid platform with a centralized view of data

Empowering TWG to drive adoption across different business users, induce compliance across teams, and make decisions on day-to-day operations.

TWG gains greater visibility on resources and incoming jobs.



Source: [Salesforce](#)

# OSF & TWG PARTNERSHIP

## Transforming the in-store experience

The solution encompassed Noel Leeming, The Warehouse, and The Warehouse Station POS. TWG's customers are now empowered to receive the best service from technicians within their stores.

As customers seek to buy products or book services, such as installation within TWG stores, they are fully supported through OSF, TWG, and Salesforce collaboration:

- ✔ Handled integrations between the Salesforce platform and the product systems while performing comprehensive tests of TWG's integration framework.
- ✔ Supported the integration of the Salesforce platform and the product systems to organize customer journeys from their point-of-sale (POS) systems.
- ✔ Synchronized integration teams and legacy teams to deploy the solution in the best conditions.
- ✔ Connected TWG brands with POS systems to Service to make bookings.



# OSF & TWG PARTNERSHIP

Creating an easy-flowing process for managers and technicians

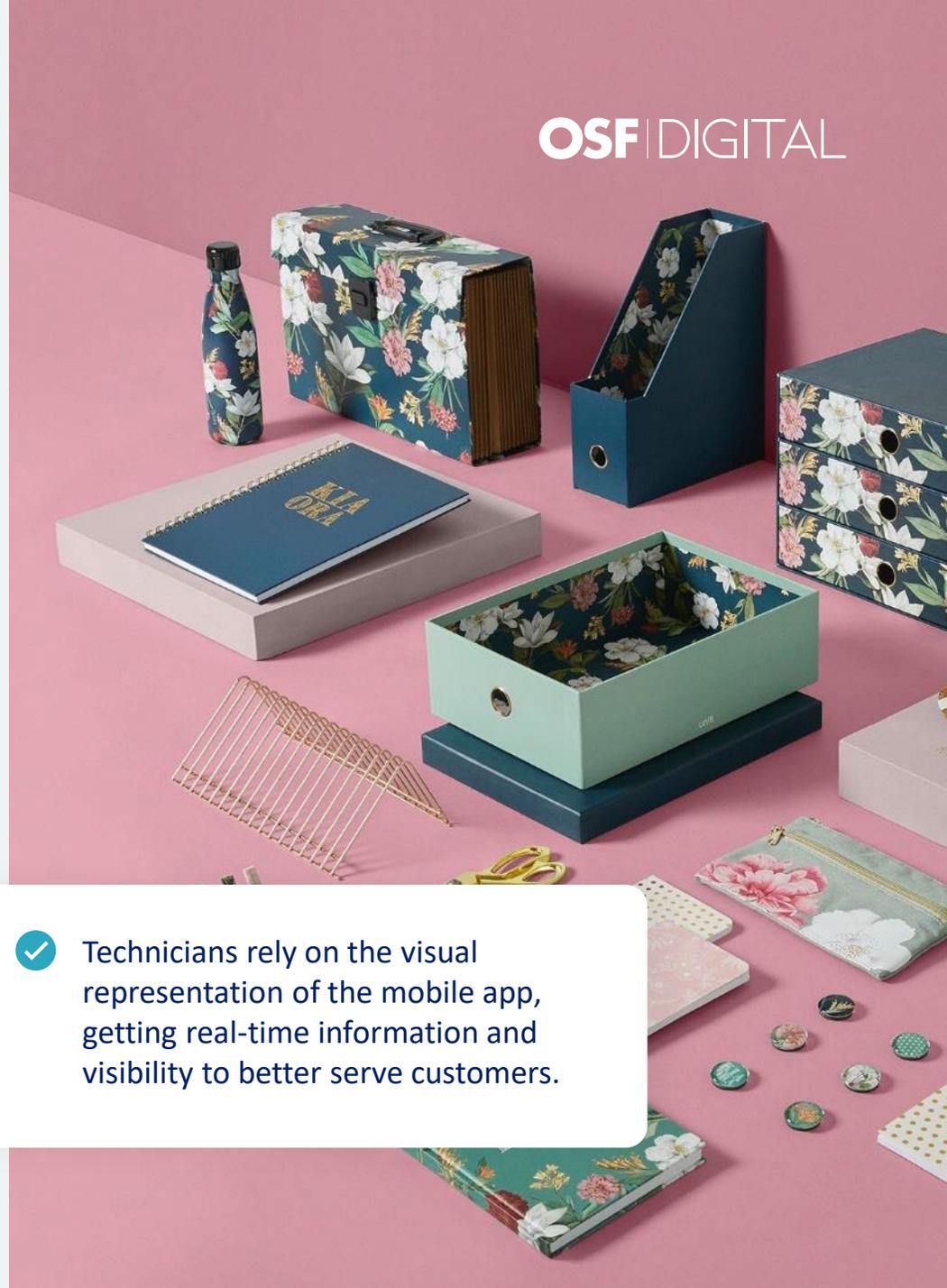
With **Field Service**, TWG relies on simplified internal processes, ensuring the staff gets a better work experience with user-friendly technology to significantly reduce manual labor.

Previously, TWG booking teams needed to provide information to all the teams. They had to contact the customers for more information, schedule, and reschedule.

Now, they have a visual representation, guided flows, and mandatory information to finish a booking without manual follow-ups.

- ✓ OSF Digital set up the Field Service Mobile App OOTB.
- ✓ Internal teams are connected with minimal friction.
- ✓ Dispatchers have a better perspective on availability, relying on Gantt charts and map functionalities.
- ✓ Technicians rely on the visual representation of the mobile app, getting real-time information and visibility to better serve customers.

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# OSF & TWG PARTNERSHIP

Enhancing the booking process with a partner portal

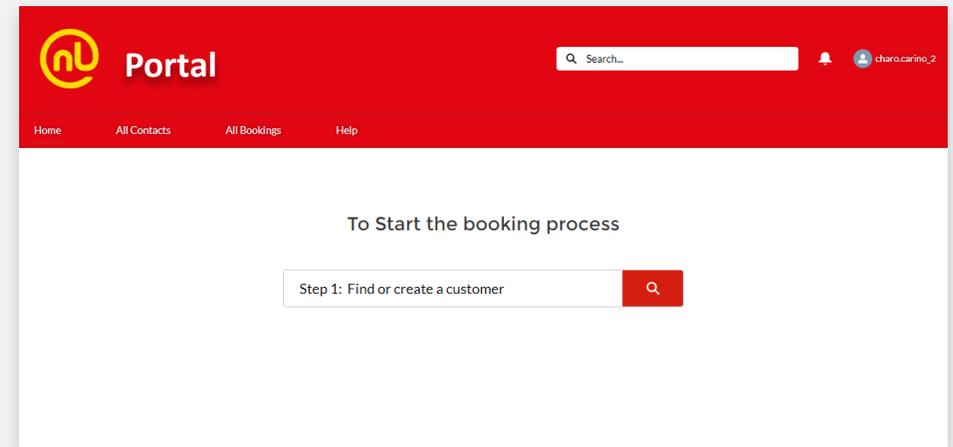
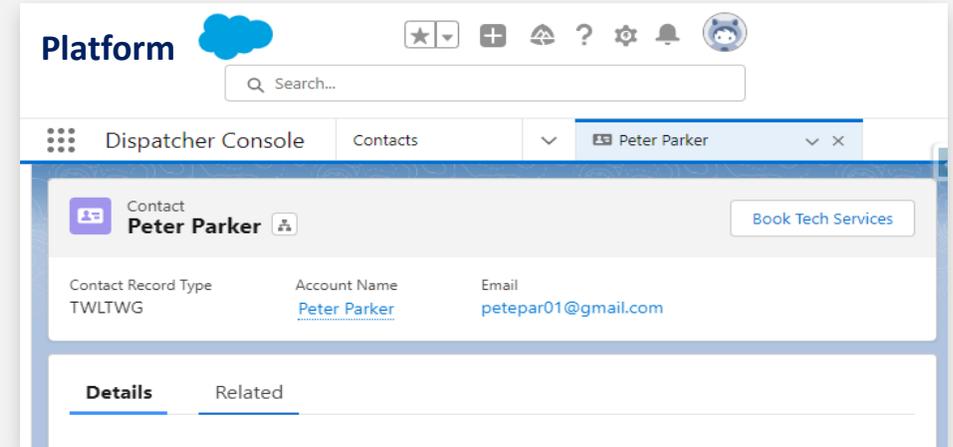
Building a portal for Tech Solutions' partners, improving the booking process and encouraging more partners to join.



TWG wanted increased capabilities to attract more partners within its business. OSF already integrated **Salesforce Experience Cloud**.

Using TWG's in-house partner portal, OSF will ensure that the platform is scalable, robust, and ready to onboard new partners in a short timeframe.

It was a great opportunity to transition the work to our Managed Services teams to onboard new partners in the future.



# OSF & TWG PARTNERSHIP

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Increasing sales with **Web-to-Lead** embedding on TWG's website

While the main source of sales and leads remains in- store, TWG's online platform was enriched with more functionalities to better match the brand experience.

TWG's system relies on its sales teams to turn customers into leads and to nurture them. Consultants record requests, provide quotes, and pursue the leads—turning them into sales.

We supplemented these efforts by embedding **Web-to-Lead** functionalities on their website, for customers to register their interest for a free consultation.

# RESULTS

## Positioning TWG to grow its business

With the Field Service Lightning solution, TWG's Noel Leeming, The Warehouse, and Warehouse Stationery can rely on optimized booking, supporting their business plans.

### Summary of build:

- 45 flows
- 3 invocable actions
- 7 Lightning web components:
  - 4 built from scratch &
  - 3 enhancements
- 15 Salesforce tickets raised

### 14 endpoints with these capabilities:

- Check availability
- Create booking
- Update booking
- Retrieve work order information
- Additional lookup services



# RESULTS

The group relies on robust optimization of resources and enhanced customer experience, expecting the following benefits:

## BENEFITS FOR THE ORGANIZATION

- More leads, business opportunities, and increased sales.
- Optimized connection between departments due to centralized data through Sales Cloud integration.
- Improved control of resources with more transparency on processes.
- Increasing the partner database with Experience Cloud integration.
- Improved customer relationship and retention through personalized, dynamic communication via marketing campaigns with Marketing Cloud integration.

## BENEFITS FOR TWG'S EMPLOYEES

- Better management of workload with more satisfied managers and technicians.
- Employees update their status, and the company has visibility on workload and bandwidth.
- Minimized drive time, heightened sustainability, and reduced manual labor.
- Simple and easy-to-track reporting with Reports and Dashboards.
- Ease of the booking process.

## BENEFITS FOR THE CUSTOMERS

- Rapid services provided to customers.
- Customers can book skilled technicians that better suit their needs.
- Increased customer satisfaction.



# TESTIMONIAL

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Our work through the eyes of our clients

We can now rely on complete information in one place, better visibility of the services booked, and which technicians are on specific jobs. This not only means our team members can do a great job, but they can nurture leads. Customers can easily use the system and follow a clear process. We have great partners in OSF and Salesforce working as #Oneteam.

**RUSSEL CHARMAN**, Chapter Lead – Change & Delivery



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**THANK YOU!**