service management IQ
a division of IQPC

Presents…

4TH ANNUAL
REMOTE SERVICES
IMPLEMENTATION™

Using Remote Strategies to Increase Revenue Streams, Cut Costs, and Maximize Product Lifecycles In A Down Economy

February 22 – 24, 2010
The Le Méridien San Francisco, CA

NEW speakers, NEW topics and NEW strategies for your NEW challenges in providing remote services!

Be sure to attend Remote Services Implementation 2010 and walk away with strategies to:

- ✔ Assign real market value to your remote services
- ✔ Understand embedded technologies to quickly address service failures
- ✔ Develop value-added capabilities off of your remote services
- ✔ Maximize your product life-cycle in a down economy

How are you evolving your remote services?

As organizations are continuing to recognize the benefits of linking into their products in the field more and more information is available on enhancing preventative and predictive maintenance capabilities. Explore new methods and technologies to boost customer satisfaction and cut costs.

- ✔ Hybrid vs. Wireless vs. Wired Connectivity
- ✔ From Diagnostics To Prognostics – Exploring The Latest Predictive Service Methodologies
- ✔ Aligning Remote Systems And Processes With Main Line Service Business Processes
- ✔ Seamlessly Integrating Workflow And Systems In A Federated Service Model

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Hear from cross-industry peers and benchmark your remote service capabilities against these key success stories and much more!

Mike Bakalyar, Manager Enhanced Services, **Gardner Denver**

Dave Sullivan, Global Customer Service Solutions, Director, Product and Service Support, **Diebold**

Erwin Thomas, Sr. Director North America Customer Care Solutions Center, **Philips Healthcare**

Scott Breeding, Services Product Line Leader, **GE Energy**

Scott Dickson, Director Field Applications, **Nikon**

Angela Farrar, Deputy Program Manager Mission Support, **Raytheon Missile Systems**

William Wagner, Director Technical Support, **Konica-Minolta**

Jonathan Gray, Research and Development Manager **Agilent Technologies**

Claire Ortega, Senior Services Product Manager, **NEI**

Marcia Rabb, Senior Product Marketing Manager, **Waters Corporation**

Ben Friedman, Research Analyst, **Manufacturing Insights**

Merlon Clemmons, Senior Enterprise Architect, **Avaya**

Robin Sing, Manager, Business Operations Analysis and Reporting, **Xerox**

Tim Boland, Systems Analyst & Architect, MS2 Global Sustainment Focus Group, **Lockheed Martin**

Phillip Severe, Sr. Service Development Manager, **Applied Biosystems**

Danielo Piazza, Director Software Engineering, **Hansen Medical**

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Dear Colleague,

In today's economy there's a growing interest in remote services and increased product intelligence. This stems from companies' need to better understand and maximize product life-cycles, cut operational costs and meet revenue requirements. According to the Aberdeen research report 48% of enterprises are capturing remote data to unearth revenue-generating business models. The **Remote Services Implementation Summit** is your chance to peer into the industries latest advancements in remote services and transition your organization from reactive to preventative value-added services.

Developed from in-depth cross-industry research the Remote Services Implementation Summit covers both the strategic and tactical lessons in enhancing infrastructure and data analysis for remote services. With limited opportunities to step outside of the office and discuss your latest challenges the Summit is the perfect way to source best practices, potential business partners and invaluable strategies from peers who've committed to making these improvements work at their organization.

The **Remote Services Implementation Summit** is the only North American cross-industry remote diagnostics and smart services event for service executives. This is your opportunity to network with the industries thought leaders in prognostics, data analytics, services marketing and remote tools in highly complex environments. We look forward to seeing you in San Francisco!

Sincerely,

Jonathan Massoud
Director Service Management IQ
IQPC

P.S.: Don't miss our pre-conference workshops! See page 3 for more details.

About Service Management IQ:

service management IQ
a division of IQPC

A division of International Quality and Productivity Center (IQPC), the **Service Management IQ** focuses on all aspects of service delivery for cross-industry service and support executives. By concentrating research and topic development into targeted programs such as Service Parts Management, Warranty Management, Knowledge Management, Remote Service and Device Monitoring and much more we can ensure our attendees are receiving the most up-to-date topic and technology discussions than anywhere else. Our unique programs are tailored to the specific needs of the service industry allowing for optimized takeaways and strategies that can be leveraged at your organization. For more information on the Service Management division at IQPC contact Jonathan Massoud at 212-885-2787, or email at Jonathan.Massoud@IQPC.com

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A

9:00 – 12:00   *8:45 Registration for Workshop A*

Remote Diagnostics: Tackling the Challenges of Working within Your Customers Infrastructure

Remote access to devices for diagnostics and maintenance is an important technique of the Field Workforce. The increasing concerns for the security of information and of the systems used to communicate, process and store information have imposed restrictions on access to these devices. These access restrictions may have the potential for becoming a challenge to servicing networked appliances. Although many devices may be remotely accessed for service, ranging from water meters to refrigerators, the approach is used predominantly for "Hardcopy Devices" (printers, copiers, MFDs, etc). Because these devices typically process confidential information and are often supported by outside organizations, there has been particular activity in identifying and addressing related security issues and countermeasures. Organizations will employ security policies using these countermeasures as well as network security considerations such as Network Access Control (NAC).

Your Field Workforce must:
- Be sensitive to the Customers' Security concerns
- Be aware of the security techniques that may be in place
- Understand how to do their jobs effectively without compromising customer security provisions
- Provide information and techniques to customers on how to make their security more effective/efficient

The workshop presentation and discussions will:
- Identify security environments, threats and countermeasures applicable to hardcopy devices as outlined in IEEE Std 2600-2008
- Discuss hardcopy "Device Health Assessment" attributes as applied to NAC protocols
- Consider:
  - Encountered and anticipated security-based access constraints
  - Approaches to effective servicing under access constraints
  - Providing added-value to customers security provisions

Bill Wagner, Manager, Konica-Minolta

B

12:15 – 3:15   *12:00 Registration for Workshop B (Lunch will be served)*

Providing REAL Remote Services on Products Designed Without a Remote Strategy in Mind

Many companies have moved to a Diagnose-Before-Dispatch model, yet many of their products were not designed or built with that strategy in mind, what can be done? What are the major issues and obstacles that must be overcome? How can we move this strategy back into engineering so the next set of products support a remote services strategy?

In this session you'll learn how to:
- Build the steps required build a remote services strategy
- Define the key objections to overcome
- Define the metrics that will change once we have remote services
- What are the elements of a business case
- What industry available tools support this strategy

How you'll benefit:
- Learn that any machine/system/tool can be supported by a diagnose before dispatch strategy
- What steps you can take to make it happen - tactical steps to use when you get home
- Business justification tools to move forward
- Examples of how this integrates with your service system

Bob Ticknor, Vice President Business Development, Qualtech Systems Inc.

C

3:30 – 6:30   *3:15 Registration for Workshop C*

How to Setup a Successful Remote Service Infrastructure and Support Organization

Very often the success of a remote service deployment depends not only on proper IT Architecture but also the support that's devoted to the systems and processes. Proper support escalation and technician workflows are vital to the success and delivery of service.

In this workshop you'll learn:
- The costs associated with an on-premises vs on-demand
- What artifacts will help insure a successful implementation of a Remote Service
- How to ensure that the system provides value back to the business
- What support features and operations can be executed for additional value add

In addition you'll benefit by:
- Developing 1st and 2nd tier support for remote systems
- Clearly defining workflows and responsibilities for repairs and 24/7 support
- Tackling the practical challenges of global remote support

Rich MacKeen, Executive Vice President, Axeda

7:00 Continental Breakfast & Registration

8:00 Chairperson's Opening Remarks

8:15 Remote Diagnostics: Transforming Your Service Organization's Technology and Culture to Meet Enhanced Customer Requirements

The ultimate goal is to keep up with ever expanding customer needs and still keep costs in control. To achieve this, traditional models of service delivery won't cut it in today's market. We face an ever expanding issue: hiring enough skilled technicians to meet customer expectations while holding down costs. Service organizations must invoke dramatic change in order to compete … they need to transform. In late 2009 Philips Healthcare was faced with the opportunity to move to a new facility. The opportunity to implement new technology started an analysis that required transformation of processes and redesign of the service delivery model. In this session Erwin highlights the numerous challenges and drastic changes involved in order to achieve such a large scale transformation including:

- New customer interface system implemented via a "hosted" system
  - Handles telephony, machine, text, email, etc customer incoming requests
  - Several key productivity tools were implemented while dramatically expanding flexibility
  - Capability exists to initiate "follow-the-sun" strategy
  - Reporting capabilities
  - Capability for Contact Center or Virtual Engineers
- Customer interface routing to the right expert – right engineer, the first time
- Customer remote interface process - technical and "soft" skill enhancements
- Ability to promote top field technicians to remote engineers without having to relocate the engineers
- Transition to support process so support engineers have exact customer configurations
- New KPIs … Overall resolution time becomes king for corrective maintenance

Erwin Thomas, Sr. Director North America Customer Care Solutions Center, Philips Healthcare

9:00 Optimizing Service Automation: Lowering Operations and Service Costs

- Benefits of automation using case based or model based reasoning
- Integrating customer data with remote monitoring
- Taking information for remote management systems to effectively asset track and store in back-office systems

Brian Anderson, Vice President Marketing, Axeda

9:45 Morning Networking Break

10:30 Panel Session: From Diagnostics to Prognostics – Exploring the Latest Predictive Service Methodologies

- Myth or not – you must have good diagnostics as a baseline
- Adding prognostic knowledge into design
  - Trend analysis and prediction
  - Detection of impending failures
- Considering cost factors of implementing prognostics
  - Non-recurring engineering costs
  - Per unit costs of prognostics themselves
  - False alarm costs
- Continuously monitoring the health of the system including:
  - Approaches for resource efficient data collection
  - Algorithms for data reduction and parameter extraction
  - Software for damage assessment and methods for identifying and analyzing precursors based on failure mechanisms
  - Techniques for predictions that can be used for assisting maintenance and logistics decisions

Merlon Clemmons, Senior Enterprise Architect, Avaya Global Services
Dave Sullivan, Global Customer Service Solutions, Director, Product and Service Support, Diebold
Scott Breeding, Services Product Line Leader, GE Energy
Somnath Deb, CEO, Qualtech Systems, Inc

11:15 Aligning Remote Systems and Processes with Main Line Service Business Processes

Often an initial remote service implementation is a standalone system run by people outside the main line service business. This offers a quick start up and is good at demonstrating value, especially to the customer. To capture more value for the service business, remote services need to be integrated closely with the main line service business processes. In this session you will learn:

- Quantifying customer value on quick response times to remote equipment events
- Avoiding duplication between remote equipment events and customer on-demand requests
- Exploring alternatives for on-demand solutions to relieve congestion and save cost
- Alignment pilot program – lessons learned

Dave Sullivan, Global Customer Service Solutions, Director, Product and Service Support, Diebold

12:00 Lunch

1:00 Tackling the Challenges of Data Acquisition and Management

- Identifying critical field metrics pertinent to your specific field operations
- Developing a strategic workflow model to optimize daily workload management
- Effectively tracking effectiveness of your performance management strategies using today's technology
- Continuously measuring performance to ensure customer service objectives are met
- Chart and report development
  - How to continuously acquire, store and analyze data from new technology
- Administrative challenges
  - Tackling the challenges which can add to your overhead

Scott Dickson, Director Field Applications, Nikon

1:45 Maximizing Fully-Secured Solutions for Legacy and New Deployments in a Down Economy

Learn how some companies are thriving in a down economy by leveraging better economies of scale and outsourcing expertise, and by switching from fixed costs to variable costs. As business and deployment models change, your solution must adapt. See how using cloud or data center deployments as well as hardware or virtual appliances can provide the long term flexibility you need. Get your solution up and running much faster and don't spend time integrating the solution yourself, in this session Claire highlights:

- Easy, flexible methods for global deployment using the cloud as well as hardware or virtual appliances
- Secured, tightly controlled solutions using a variable cost model
- Lowering operations and service costs with full lifecycle management
- Remote monitoring for both legacy and new device deployments

Claire Ortega, Senior Services Product Manager, NEI

2:30 Leveraging Insights on Equipment Condition to Develop Tighter Relationships with Customers

This presentation describes, GE's System 1® Optimization and Diagnostic Platform, uses "crisp" logic based rules and neural net modeling to analyze both individual machine faults as well as fleet trends to enhance plant and equipment reliability and operations through remote services. Scott describes how their rule processing system fits into the overall plant asset management system and summarizes the sequence in which the rules are applied to the data in order to determine if a problem exists. The overall customer process implementation cycle required to fully use the system is addressed, along with the necessary ongoing training requirements. Additionally Scott highlights how this process has been applied at both a N.A. coal-fired power plant and a large China-based chemical plant. Takeaways include:

- Analysis and knowledge-sharing of fleet information to enhance plant and equipment reliability and operation
- Using remote access to enable the application of higher value diagnostic services
- Understanding your customer's business drivers and delivering value - makes the monitoring platform essential to plant operations
- Enabling factors of technology and end-user critical business drivers to make a CM platform successful
- Focus on realized customer value

Scott Breeding, Services Product Line Leader, GE Energy

3:15 Afternoon Networking Break

4:00 Understanding Embedded Technologies to Quickly Address Service Failures within Your Existing Infrastructure

- Understanding what you paid for, validating SLA's, monitoring network activity and isolating faults
- Increasing device-level intelligence through advanced instrumentation to enhance management efficiencies for zero-touch deployments and SLA compliance, along with fault, performance, and configuration management
- Verifying network infrastructure capacity before deployment to meet customer expectations
- Enhancing service fulfillment through assurance, validation and troubleshooting activities for embedded technologies

Jim McDonnell, Sr. Director Services Technology, Cisco

4:45 Maximizing Customers Product Lifecycle in a Down Economy

- Gauging the reliability of the equipment as it gets older
- Examining preventative maintenance as an option
- Keeping up with rapid technology changes – no matter the state of the economy
- Developing a routine scheduling system based on availability of parts and labor

Ben Friedman, Research Analyst, Manufacturing Insights

5:30 Remote Service Automation Industry Roundtables

Now is the time to start picking up the slack in expertise and resources to fill the skills gap in your service organization. In today's economy service executives need to do more educating of field personnel to ensure they're prepared for handling the cross-industry crunch resulting from economic uncertainty. This session is about testing your own service organization's preparedness for what lies ahead. Roundtables discussions will focus on best practices criteria and how your organization matches up. Come prepared to get involved, share ideas, and ask the questions and get the answers for which you came.

Table 1: Topic to be Announced
Tim Boland, Systems Analyst & Architect, MS2 Global Sustainment Focus Group, Lockheed Martin

Table 2: Remote Diagnostics: Proving The Value-Add Into Your Customers Networks
Phillip Severe, Sr. Service Development Manager, Applied Biosystems

Table 3: Streamlining Your Remote Services With Preventative Strategies To Support Product Evolution and Optimization
Danielo Piazza, Director Software Engineering, Hansen Medical

Table 4: Topic to be Announced
Ruchi Choski, Product Support Engineer, Hansen Medical

6:30 End of Main Conference Day One

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7:30 **Registration and Coffee**

8:00 **Chairperson's Opening Remarks**

8:15 **Segmenting Data Reporting To Maximize Deliverables for Multiple Stakeholders**

Unless your remote monitoring solution is thoughtfully designed it is likely that the diamonds (actionable items) will be lost in the coal field. A carefully planned system will appropriately address near term response objectives as well as longer range learning and back office objectives without creating confusing clutter. In this session Mike shares his insights on how to:
- Determine who wants diamonds (define the need)
  - Where is the value delivered
  - There may be multiple value drop offs
  - Enterprise based platform
- Identify Key Indicators for response issues
  - Intervention strategy
  - Routine response strategy
- Determine where and how the diamonds are delivered
  - Stake holder access and interface
  - Level and security appropriate
- Define the learning objectives (how do we manage diamond dust)
  - Product design and reliability feed back
  - Back office integration for support and provisioning

Mike Bakalyar, Manager Enhanced Services, Gardner Denver

9:00 **Panel Session: What to Look For In Performing Proactive Data Analysis**
- Making data available in data marts for integrated software and systems
- Capturing predictive warning signs and functional failures
  - Noise ratios
  - Call drops
  - Quality of equipment
  - Congestion in routers
  - Packet drops
  - Routing tables
- Developing a balance scorecard/dashboard – what should it look like?
- Obtaining agreement on customizing workflow and system controls based on results

Mike Bakalyar, Manager Enhanced Services, Gardner Denver
Scott Dickson, Director Field Applications, Nikon
Scott Breeding, Services Product Line Leader, GE Energy

9:45 **Morning Networking Break**

10:30 **Autonomic Tracking & Response for Remote Services Automation**

BNet Corporation and Raytheon Missile Systems (RMS) have developed wireless solutions for tracking and monitoring ordnance. The wireless solutions are built on open standards and interfaces and designed to easily accommodate virtually any sensor, actuator, or other edge device. In this session Angela highlights and discusses the benefits of:
- Using IEEE 802.15.4 RF protocols and operating in the 2.4 – 2.48 GHz unlicensed ISM band
- mesh network sensing devices with important benefits relative to remote monitoring
- Successfully integrating wireless mesh network sensing devices with RMS' Autonomic Tracking and Response System (ATaRS), to provide for data fusion, situational analysis, and situational presentation

Angela Farrar, Deputy Program Manager, Mission Support, Raytheon

11:15 **Providing REAL Remote Services on Products Designed Without a Remote Strategy in Mind**

In this session Bob takes his workshop one step further to discuss how any machine/system/tool can be supported by a diagnose-before-dispatch strategy. What steps you can take to make it happen, appropriate business justification tools to move forward and examples of how this integrated with your existing service system.

Bob Ticknor, Vice President Business Development, Qualtech Systems Inc.

12:00 **Lunch**

1:00 **Patterns And Strategies In Remote Service Enablement**

In this session Merlon covers the patterns and strategies applied by Avaya Technology for creating a remote service infrastructure and offering. These strategies have been developed for enabling high value service offers and capabilities in a complex distributed application environment of VOIP and Contact Center management. Highlights include:
- Fault detection and Diagnostics
- Proactive service and prognostics
- Channel enablement
- Federated service models

Merlon Clemmons, Senior Enterprise Architect, Avaya Global Services

1:45 **Panel Session: Hybrid vs. Wireless vs. Wired Connectivity**
- Identifying costs for one method over another: making a case for a hybrid model
- Segmenting your customer base for infrastructure and monitoring capabilities
- Weighing customer adoption and challenges with security for the preferred model
- Identify available solutions and existing features to drive customer adoption: recent trends or adoption

Mike Bakalyar, Manager Enhanced Services, Gardner Denver
Jonathan Gray, Research and Development Manager, Agilent Technologies

2:30 **Effectively Upgrading Your Existing Remote Services to Meet New Customer Demands**

An organizations objective for implementing remote services changes over time from knowledge gained through experience. From delivering faster problem resolution to gaining competitive advantage your organizations business process significantly impacts your goals. During this session you will hear about lessons learned for a more efficient deployment including:
- Integrating back office processes
- Quantifying devices proposed to be online
- Establishing metrics to measure success
- Building more intelligent devices to increase customer value
- Leveraging data collected for continuous product improvement

Marcia Rabb, Senior Product Marketing Manager, Waters Corporation

3:15 **Afternoon Networking Break**

3:45 **Tackling the Issues of Accessing Customer Networks Remotely to Capture the Most Useful Data Possible**
- Addressing the concern of allowing somebody access to your network
- Proving ROI and addressing predictive capabilities
- Educating the customer and ensuring protocol before access
- Reducing headcount and second-call visit rate through design

Jonathan Gray, Research and Development Manager, Agilent Technologies

4:30 **Using Information to Change the Culture to Ensure Acceptance of Lower Cost Offerings without Reducing Customer Satisfaction**
- Providing access to user friendly documentation for troubleshooting
- Providing the necessary tools to get vital information to minimize time consuming calls
  - Identifying which data will drive improvements in your service needs
- Executing continuous data transfer to the frontline to improve first time resolution and boost profitability and customer satisfaction
  - Evergreen review of data to identify missed opportunities for lower cost resolution
  - Identify effectiveness of documentation and tools to maximize remote opportunities
  - Ensuring the appropriate use of resources to promote customer satisfaction
- Utilizing Lean Six Sigma and the Voice of the Customer
- Understanding the impact of remote services on Uptime with your customer base

Robin Sing, Manager, Business Operations Analysis and Reporting, Xerox

5:15 **Conclusion of Remote Services Implementation 2010**

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4TH ANNUAL
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❏ **Conference**   ❏ **Workshop(s):** ❏ A ❏ B ❏ C

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Conference Only	$999	$1,599	$1,799
All Access	$1,899 **(save $1,547)**	$2,499 **(save $947)**	$2,699 **(save $747)**
Workshops	$549 each	$549 each	$549 each

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A $99 processing charge will be assessed to all registrations not accompanied by credit card payment at the time of registration.

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VENUE AND LODGING

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Le Méridien San Francisco is a luxury hotel located in the heart of San Francisco's Financial District. Our hotel is connected by a landscaped pedestrian bridge to the historic Federal Reserve Building, and the shops, entertainment, and cafés of the dynamic Embarcadero Center. Le Méridien is also steps away from San Francisco's main leisure attractions such as Chinatown and the California Street cable cars, with easy access to Fisherman's Wharf and Ghirardelli Square.

The guest rooms are spacious and many offer sweeping views of the bay as well as the city. The rooms have an attractive, contemporary décor and appointments with fine furnishings. Accommodations are 100% non-smoking and are equipped with wired and wireless High Speed Internet Access, plush robes, beds with 300-count Frette sheets, down duvets, and a Nakamichi stereo/CD player. Room service is available 24 hours a day.

Group Rate - $219
Please identify you are part of the **Remote Service-IQPC** group to ensure the special rate.

Note that you are eligible for this rate three day prior and three days post the event.

Please make your reservation before **Friday, January 29, 2010** in order to ensure you are eligible for the group rate.

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Qualtech Systems, Inc. (QSI) offers field service intelligence solutions to OEMs and end users in the commercial and defense space. OSI customers have consistently achieved higher customer satisfaction and improved profitability by optimizing field service operational metrics such as asset uptime, lead time to act, mean time to repair, first time fix rate, spares consumption rate and work force productivity. QSI's TEAMS ® software solutions enable optimization of product design for effective field service, provide timely and actionable service intelligence in the field through real time and ondemand monitoring and diagnostics and guide every technician to perform like an expert. Some of QSI's customers include Boeing, FEI Company, GE, Honeywell, NASA, Orbotech, Pratt & Whitney, Sikorsky, Thales and DoD. Website: www.teamqsi.com

Axeda Corporation is the leading on-demand intelligent asset management company delivering M2M solutions for Smart Services, Smart Products, and Smart Operations. The company's VeriSign® Security certified platform and applications allow companies to connect, manage, service, and track wired and wireless assets anywhere – it serves over 100 of the world's leading enterprises including Diebold, EMC, and Philips. Axeda Corporation is a privately held company headquartered in Foxboro, Mass. and can be reached at www.axeda.com.

Lantronix, Inc. (NASDAQ: LTRX) is a global leader of secure communication technologies that simplify remote access, management and control of any electronic device. Its solutions empower businesses to make better decisions based on real-time information, and gain a competitive advantage by generating new revenue streams, improving productivity and increasing efficiency and profitability. Easy to integrate and deploy, Lantronix products remotely connect and control electronic equipment via the Internet; provide secure remote access to firewall-protected equipment; and enable remote management of IT equipment over the Internet. The company's headquarters are located in Irvine, Calif. For more information, visit www.lantronix.com

ABOUT OUR MEDIA PARTNERS

NASM is an organization dedicated to providing professional leadership and education to the service executive, while developing their managerial expertise in the business and organizations that they represent."

The National Association of Service Managers is the oldest professional nonprofit association of product service executives in the United States, founded when service techniques were just beginning to be highly recognized as a sales and marketing tool, NASM has three objectives:

*   Improve the service industry's quality and effectiveness;
*   Foster communications and cooperation among service managers in the industry; and
*   Provide quality educational opportunities directly related to the needs of the industry.

Website: www.nasm.com

Plant Engineering is a problem-solving resource for industrial plant engineering professionals responsible for the planning, specification, installation, maintenance and operation of industrial plant facilities, utilities, equipment and systems. It provides information to the people who operate and maintain industrial plants and bridges the information gap between engineering education and practical application. Website: www.plantengineering.com

Control Engineering continues to set high standards as the multimedia leader of control, instrumentation and automation.

For more than 50 years, Control Engineering magazine has upheld a commitment to consistency and quality, earning subscribers' trust and building great affinity. We serve the automation market, which designs, implements, maintains, and manages control/instrumentation systems, components, and equipment, through comprehensive coverage of the following areas:

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