

# Pioneering Water Treatment Solutions

Axis Water's Sales  
Operations revamp



# Innovating Water Treatment Solutions & Growing Pains

Axis Water is a prominent player in the water treatment industry, known for providing sustainable and innovative solutions for both industrial and municipal water purification. Their expertise spans the design, installation, and maintenance of sophisticated water treatment systems aimed at improving water quality while minimizing environmental impact. As Axis Water expanded its services and customer base, the need for a more robust and integrated operational system became increasingly apparent.

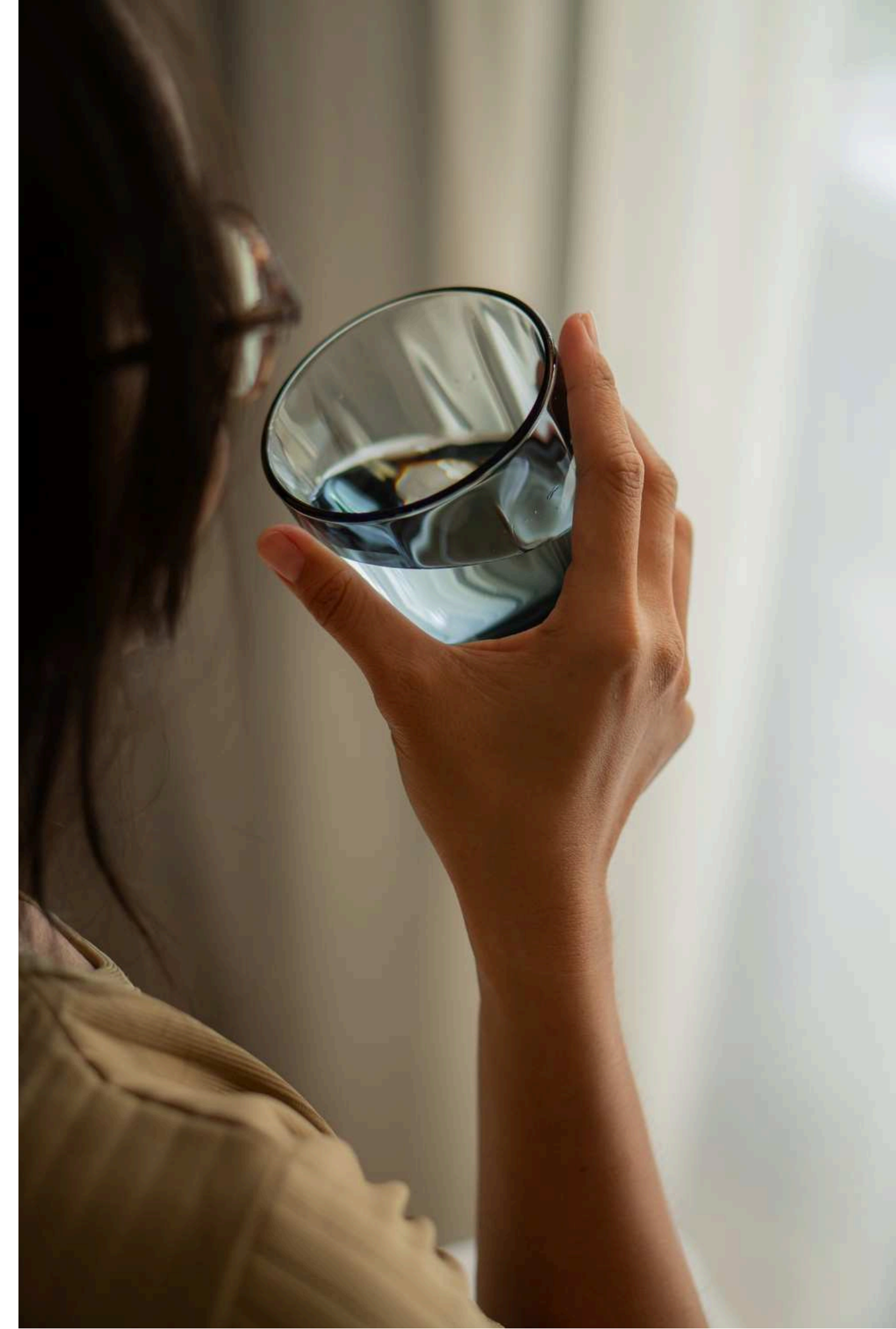
With the rapid growth in operations, Axis Water faced several operational challenges. The company struggled with managing an increasing volume of customer interactions and service requests, which were handled through disparate and manual systems. This fragmentation led to inefficiencies, data inaccuracies, and delays in service delivery. Recognizing the critical need to streamline operations and improve service management, Axis Water engaged DTC Force to implement a tailored Salesforce solution that would unify their processes and provide a solid foundation for future growth.

## PHASE 1

# Laying the Foundation: Data Integration and System Setup

In the first phase of the engagement, DTC Force focused on addressing the foundational issues within Axis Water's operational systems. The company was managing customer data, service orders, and financial records through a variety of unconnected tools, which led to significant inefficiencies and data silos. These issues were particularly pronounced in the way Axis Water handled its service and billing operations, where data had to be manually transferred between systems, increasing the risk of errors.

DTC Force began by deactivating Axis Water's existing accounting software, Accounting Seed, and migrating all relevant data into QuickBooks Online. This process included extracting and securely backing up a comprehensive range of financial and operational data, from billing histories to inventory records. The integration of QuickBooks with Salesforce was then established through a bi-directional sync, ensuring that all customer, product, and financial data could flow seamlessly between the two platforms. This setup allowed Axis Water to generate quotes, invoices, and other financial documents directly within Salesforce, significantly streamlining their processes.



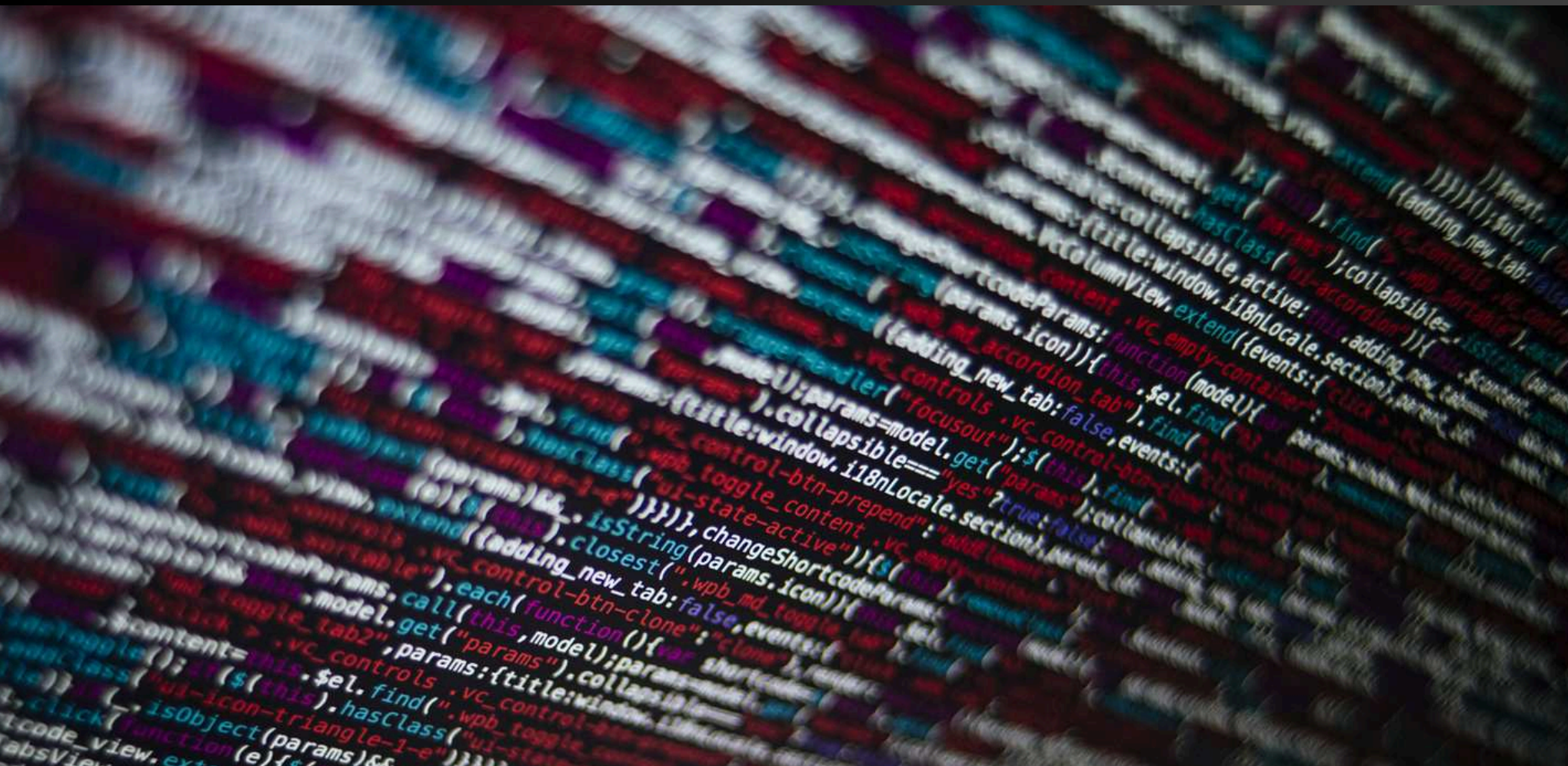
## Phase 2

# Enhancing Service Delivery: Customization and Automation

With the data foundation securely in place, the focus shifted to enhancing Axis Water's service management capabilities. The company needed a more efficient way to manage work orders and ensure that the right technicians with the appropriate skills were assigned to each task. The manual processes they were using were time-consuming and often led to delays in service delivery, impacting customer satisfaction.

**DTC Force customized Salesforce Field Service Lightning to automate and optimize the service delivery process.**

- This involved creating a custom structure where each product and associated work type had predefined skill requirements. Salesforce was configured to automatically match work orders with the appropriate technicians based on these skill requirements, ensuring that service requests were handled promptly and effectively..
- Additionally, service duration fields were introduced to provide accurate timelines for service delivery, which could be adjusted based on specific maintenance plans.
- These enhancements not only improved operational efficiency but also reduced the administrative burden on Axis Water's team.



## PHASE 3

# Advanced Customizations & Future-Proofing

### **Building on Success: Advanced Customizations for Long-Term Growth**

Following the successful implementation of the first two phases, Axis Water and DTC Force entered the third phase of the project, focused on continuous improvement and future-proofing the system. As Axis Water's operations continued to scale, there was a need to further refine and customize the Salesforce platform to meet the evolving demands of their business.

### **Solution: Advanced Features for Scalability**

In this final phase, DTC Force implemented additional customizations to further enhance Axis Water's service delivery capabilities. This included advanced automation features for work order management, allowing for even more precise matching of technicians to tasks based on a broader set of criteria. The system was also configured to support complex service agreements and multi-site management, providing Axis Water with the tools needed to efficiently manage larger and more complex projects. This phase ensured that Axis Water's Salesforce environment was not only capable of handling current operations but was also scalable to support future growth and diversification.



Strategic Positioned for Future Growth

# A Comprehensive Transformation for Axis Water

Through the Salesforce implementation, Axis Water achieved a significant transformation in its operational capabilities. The integration and automation of service management processes led to faster response times, reduced operational costs, and improved customer satisfaction. Moreover, the system's scalability ensures that Axis Water is well-positioned to continue its growth trajectory, taking on larger projects and expanding its service offerings with confidence. The collaboration with DTC Force has provided Axis Water with a powerful toolset that will support its mission to lead the industry in sustainable water treatment solutions for years to come.



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