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| Background: | This document describes the process necessary to support field installation of equipment by the manufacturer. Its intent is to provide the guidelines of activities and items needed to provide excellent installation, customer satisfaction and revenue growth. |
| Quality and service strategy: | As part of this process, a service strategy towards the customer and the quality statement is required for all to understand. This is where the objective of how the company wants to treat and support the customer is defined. See sample guideline. . . . |

Process steps:

The following are the steps in the process:

| Phase | Description | Major actions | Comments / Documents |
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| 1 | Pre-sales & Sale | <ul style="list-style-type: none"> • Are the customers buying the correct product for their needs? • Who is the customer that will own the installation process? • Building the relationship with the customer through sharing knowledge. | |
| 2 | Pre-installation set-up | <ul style="list-style-type: none"> • Establishing contact with the customer so they understand what they have to do? • Get an accurate date to set the installation time prior to the ship date. • Have they done what is necessary to get the site ready for the installation? Do they know what to expect? • Who owns the relationship on the vendors side? | <ul style="list-style-type: none"> • Knowledge of the installation date • Send Expectation document |
| 3 | Installation | <ul style="list-style-type: none"> • Getting the date that meets the customers need • Having the customer ready for the installation & training • Achieving installation in one service call • Tracking and closing the installation if something fails • Setting the next steps in the building the relationship with the customer | <ul style="list-style-type: none"> • Have a customer satisfaction survey for installation portion • Create a closure process when the installation is not complete the first time • Send report to sales and service follow-up |
| 4 | Contract maintenance | <ul style="list-style-type: none"> • Getting the next level of additional business from the customer • Clear measurement of are we getting better in our delivery of Installation and service offering | Implement post-Installation support |

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| Documents: | <p>Major point in relationship to the documents & # system:</p> <ul style="list-style-type: none"> • Need a consistent # system plus a way to categorized these document (content, purpose, owned by, where used, what to do after completed, product group) • Need a consistent set of major sections within the documents (ie. what are the key points needed to be said) |
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| <p>Communications with the Customer...</p> <p><i>Can we use a web based collaboration tool to schedule, communicate and provide the document repository.</i></p> | <ul style="list-style-type: none">• How do we find the person who is responsible for the installation?• Where do we list their names, once found?• Is it important to speak to the customer, verbally or can we use email?• What do we want to tell them and have them do?• Is there a schedule of activities they need to do?• Why aren't we using the Internet for communications? Is secure web pages with password access |
| <p>Communications internally with the Field Engineers and Sales people</p> | <ul style="list-style-type: none">• How do we notify the Field Engineers of a new installation and what is our expectations of them?• How do we communicate with them?• How is the hand-off done in relationship to speaking to the customer?• Who is responsible for the accuracy of Field Pro?• What do we want to tell the Sales person? What do they want? |
| <p>Installation process:</p> | <ul style="list-style-type: none">• How do the Field Engineers get the necessary instructions for the installation?• What about tools?• What about unique requirements for the installations like Process requirements & metrology tools for plasma, Calibration std for industrial?• Coordination with 3rd party people in microanalysis process?• How do we know customer is ready? Has done all the initial work?• The job has been done correctly?• We need to go back, how do we manage that? |
| <p>Follow-up process:</p> | <ul style="list-style-type: none">• How do we go back to see if everything is working correctly a few months later?• What do we do with the data we collected from the installation process?, who gets it? |
| <p>Measurements & Reports:</p> | <ul style="list-style-type: none">• What measurements do we take along the way?• What reports do we do and how do we use them?• How are we measured in relationship to the installation process and the customers satisfaction? |