



# INSTALLED BASE ORGANIZED:

Manufacturers' Guide to Growing  
Aftersales and Service Revenue



AI-Powered Aftersales Software for Manufacturers

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# Table of Contents

<b><u>Executive Summary</u></b>	03
From Data Fragmentation to Aftermarket Transformation	
<b><u>Customer Background</u></b>	04
A Legacy Manufacturer with a Modern Challenge	
<b><u>The Challenge</u></b>	05
Data Silos, Revenue Leakage, and Aftermarket Blind Spots	
<b><u>The Solution: Installed Base Golden Record</u></b>	06
Unifying Data for a Single Source of Truth	
<b><u>Turning Inspection Forms into Actionable Data</u></b>	08
From PDFs to Searchable, Structured Records	
<b><u>Measurable Outcomes &amp; Business Impact</u></b>	09
Quantifiable Results and Customer Success Metrics	
<b><u>Installed Base Data as a Source of Aftermarket Advantage</u></b>	10
Showcases how mapping equipment age and condition reveals replacement, upgrade, and AMC opportunities to boost aftermarket growth.	
<b><u>Turning Customers into Long-Term Relationships</u></b>	11
Explains how proactive service, upgrades, and predictive insights transform one-time buyers into loyal, recurring customers.	
<b><u>Customer Testimonial</u></b>	12
A Trusted Partnership for Aftermarket Growth	
<b><u>Unlock Your Installed Base Intelligence</u></b>	12
Next Steps & How to Get Started	

# Executive Summary

A leading industrial boiler manufacturer, with a long history of market leadership, partnered with Industrility to reclaim its aftermarket dominance and drive new revenue growth. The core challenge was severe data fragmentation; critical information on their installed base was scattered across disconnected Enterprise Resource Planning (ERP) systems, service spreadsheets, public regulatory inspection certificates, Start-up reports, PDF reports, regional databases and distributor data. This lack of a unified view meant missed service opportunities, revenue leakage, and a reactive approach to customer management.

Industrility built an "**Installed Base Golden Record**," a single, authoritative source of truth for every piece of equipment sold. Leveraging our AI-powered Software as a Service (SaaS) platform, we aggregated these disparate data sources, cleansed and standardized the information, and used machine learning to link related records. The project focused on a key sales region, creating a repeatable, scalable process for unifying their national data.

The results were immediate and impactful:

- **Complete Installed Base Visibility:** A unified, searchable record of every boiler, its service history, and current customer.
- **Empowered Sales and Service Teams:** Representatives gained a 360-degree view of customers, enabling proactive outreach and consultative selling (Service, Parts, Upgrades, retrofits and new capital equipment).
- **Increased Revenue Capture:** Data-driven insights immediately uncovered new parts and service opportunities, reducing customer churn and increasing service contract attachment rates.



# Customer Background

For decades, the manufacturer has been a premier provider of industrial boilers and boiler room equipment. Their go-to-market strategy relies on an extensive network of authorized representatives, serving a wide range of industries. While this model is effective for sales, it created significant data challenges. Information about the end customer, equipment status, and service history was often held locally by representatives in siloed systems, preventing the manufacturer from having a clear, centralized view of its own assets in the field.



# The Challenge: Data Fragmentation and Aftermarket Blind Spots



The inability to see and understand their full installed base led to several critical business challenges:

- **Fragmented Data Silos:** To get a complete picture of a single customer, a team member would need to manually consult multiple, disconnected systems. For example, an equipment serial number in the Enterprise Resource Planning (ERP) system have parts orders, while service history for the same machine was tracked in a separate service management system and Excel spreadsheet. Crucial inspection data was locked away in PDF reports while Boiler Inspection reports were available from Public Authority and openData, parts Bills of Materials (BOMs) were stored in yet another system (PLM, PIM and ERP). Answering a simple question like, "What is the full history of touchpoints for this boiler?" was nearly impossible.
- **Limited Service Visibility & Revenue Leakage:** Without a unified view, the company could not effectively track its Service Lifetime Value (the percentage of the installed base actively under service contracts or purchasing parts). Customers would fall "off the radar" after an initial service, leading to significant revenue leakage as service contracts lapsed and upgrade opportunities were missed.
- **Ineffective Representative Coordination:** The data gap made it difficult to support their representative network effectively. The manufacturer could not easily identify customers who had not been contacted, track maintenance schedules proactively, or provide reps with the detailed asset history needed for strategic, data-driven sales conversations.

**Bottom Line: Customers Suffered. Loyalty Eroded.  
Aftermarket revenue lost.**


# The Solution: Forging an Installed Base Golden Record

Industrility's approach was to build a clean, enriched master database from the ground up by systematically unifying all existing data.

**Our Process:**

- 1. Data Collection & Aggregation:** We began by consolidating data from every available source, creating a complete data lake. This included structured data from the Enterprise Resource Planning-ERP (Like SAP, IFS, Oracle, Epicor) and service management systems(Like ServiceMax, SalesForce), as well as unstructured data from sources like PDF inspection reports (And other public data sources), IoT platforms, and internal Excel files.
- 2. AI-Powered Data Cleansing and Linking:** This is where Industrility's core technology created transformative value.
  - a. Unstructured Data Extraction with AI Image Processing:** We used AI to digitally "read" thousands of PDF inspection reports from publicly available government data sources. This AI-driven process extracted previously inaccessible information, like contact names, phone numbers, email addresses, and inspection dates, and converted it into structured, usable data.

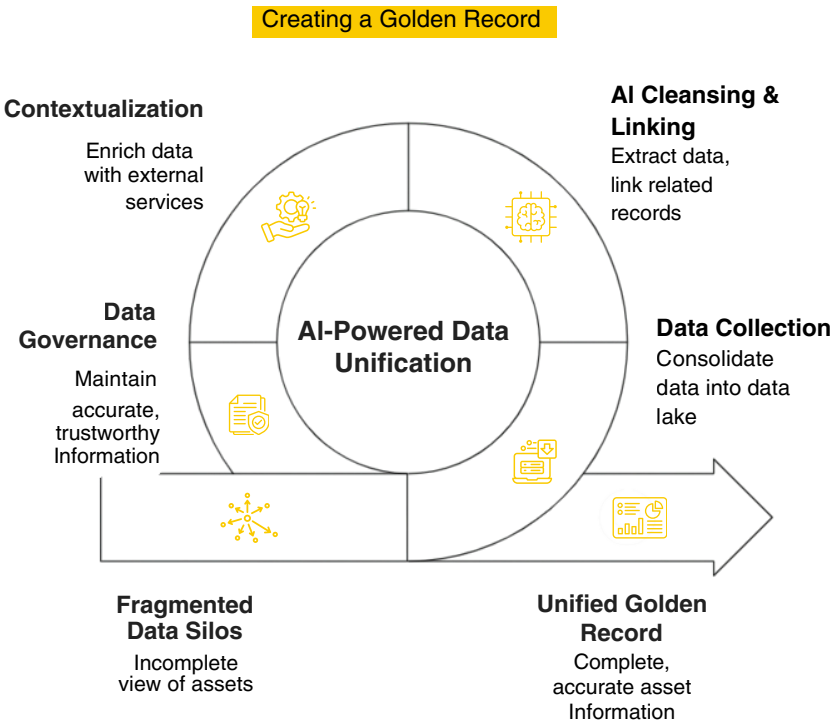
**AI-Powered Data Enrichment**



Industrial AI

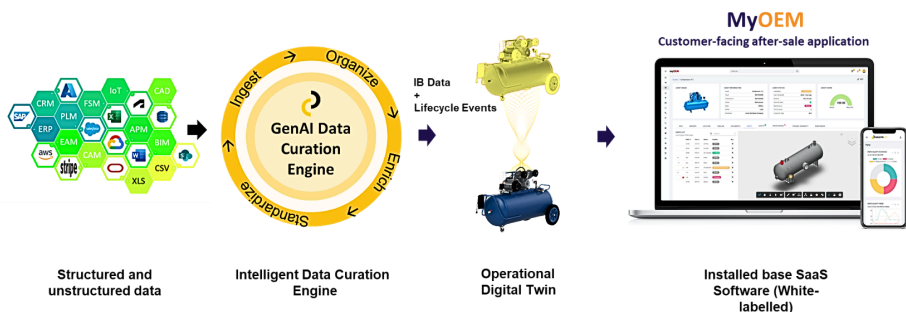
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- "City": "Midland",
- "State": "TX",
- "Zip": "79703-4822",
- "Contact Name": "Chuck Brooks",
- "Contact Phone": "432.221.4969",
- "Contact Email": "chuck.brooks@midland-memorial.com",
- "Object Location": "Boiler Room",
- "Manufacturer": "Fulton",
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- "Manufacturing Model Number": "EDR+2500",
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- "Item Law/Rule And Violations": "Not specified",
- "Inspection Organisation": "Chubb",
- "Inspection Date": "09/06/2022",
- "SIGNATURE OF INDIVIDUAL PRESENT AT INSPECTION": "Chuck Brooks, Manager",
- "Inspection Individual": "Adalberto Rabadan"

- b. Machine Learning for Record Linkage:** Our AI algorithms intelligently linked related records across the different systems, even when there was not a perfect match. For example, it could connect a service record in an Excel file to an equipment record in the ERP by correlating fuzzy matches on customer names, physical addresses, and serial number fragments. This created a complete, 360-degree view of each asset.
- 3. Contextualization & Enrichment:** Once linked, the data was enriched with further context using external service like Google Maps, D&B, Emissions regulatory databases, Precisely, Apollo and others. We validated addresses, phone numbers, and contact persons. This process created an accurate database of aftermarket CRM along with a complete historical timeline for every boiler, from initial sale to every subsequent parts order, service call, and inspection.
- 4. Ongoing Data Governance:** The Golden Record is maintained on Industrility's platform with continuous data governance, including regular updates, validation rules, and periodic audits to ensure the data remains accurate and trustworthy over time.





# Technology Platform: The Engine of Transformation



Industrility's solution is built on a modern, cloud-based Software as a Service (SaaS) architecture designed to handle complex industrial data.

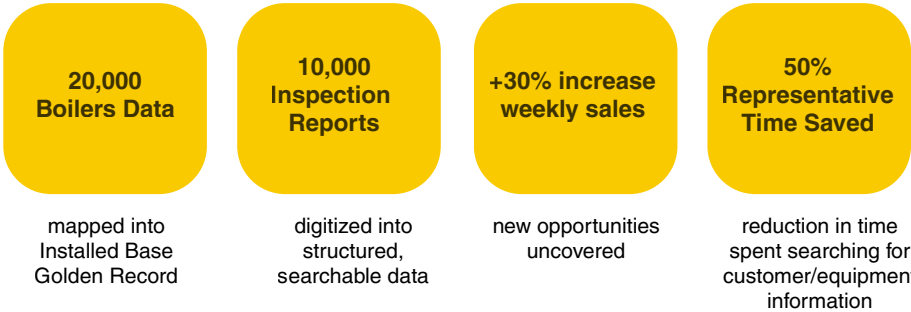
- **Intelligent Data Ingestion Engine:** This engine automates the process of cleaning, normalizing, and transforming data from any source, whether it is a structured database feed or a collection of unstructured PDF files and Excel files.
- **Industrility Aftersales Platform:** A secure, cloud-based application that serves as the central repository for the Installed Base Golden Record of Industrial Equipment. It provides real-time visibility through intuitive dashboards, advanced search functionality, and detailed analytics on asset histories and customer details.
- **AI-Powered Analytics & Insights:** The platform includes built-in analytics that provide on-demand reports and visualizations. Our AI helps identify patterns and opportunities, such as which customers are at risk of churn or which equipment is due for a critical upgrade, enabling data-driven decision-making.



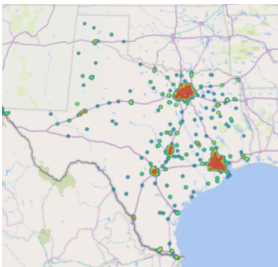
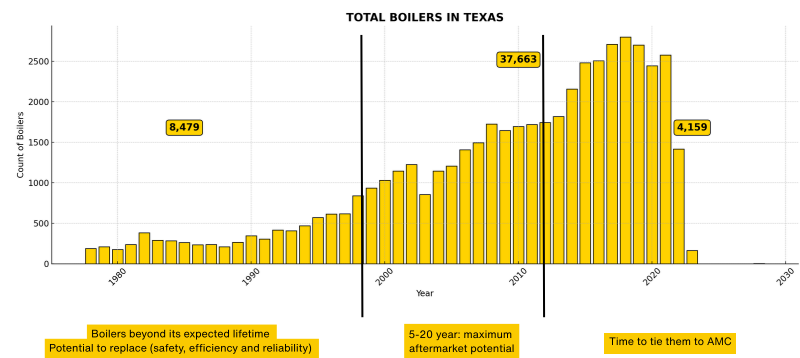
# Measurable Outcomes and Business Impact

The Installed Base Management delivers a significant, measurable results:

- **Unified, Searchable Database:** Complete, real-time records of all equipment, customers, and service histories
- **Reduced Revenue Leakage:** Proactive re-engagement of dormant customers drives new service contracts and parts sales
- **Empowered Distributor Network:** Centralized data enables distributors to become strategic consultative partners
- **Improved Customer Retention:** Data-driven proactive service reduces downtime and increases satisfaction



# Installed Base Data as a Source of Aftermarket Advantage



Map of Manufacturers

CHROMALOX	SUPERIOR	CAMUS	RITE ENG	AJAX	BRYAN	STERIS CORP	BRADFORD WHITE
AERCO	SELLERS	PATTERSON KELLEY	WILLIAMS & DAVIS				
FULTON	LAARS	RHEEM					
TELEDYNE LAARS	CLEAVER BROOKS						
A O SMITH	PVI						
LOCHINVAR	RBI						
RAYPAK							

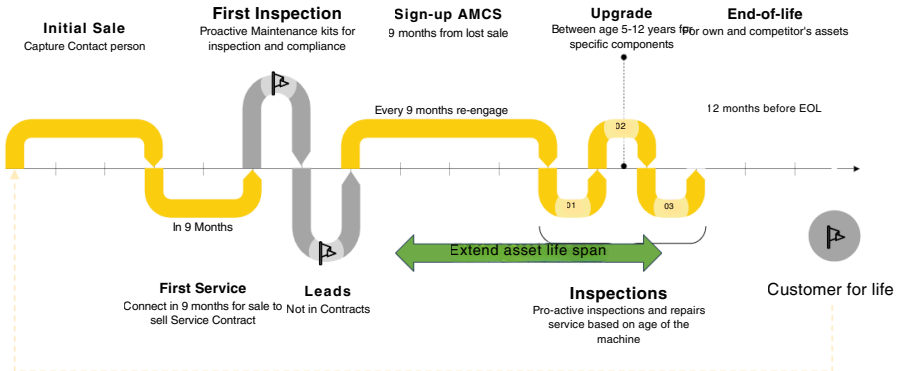
Manufacturers by size

Every boiler reflects its age, condition, and revenue potential. The chart above highlights boilers in Texas that have surpassed the 5–20 year operational window, a critical stage where replacement, efficiency upgrades, or Annual Maintenance Contracts (AMCs) are required.

- **Boilers Beyond Expected Life:** High risk of failure with immediate replacement opportunities.
- **5–20 Year Range:** Maximum aftermarket potential through services, AMCs, and retrofits.
- **Actionable Insights:** Mapping boilers by manufacturer and size reveals competitive opportunities and supports expansion of service coverage.

Industriality's Installed Base Intelligence unifies fragmented datasets into structured insights, enabling OEMs to identify the right customers at the right time and secure aftermarket revenue ahead of competitors.

# Turning Customers into Long-Term Relationships



The customer journey extends beyond the initial sale, progressing through inspections, maintenance, upgrades, and eventual replacement. Each stage represents an opportunity to increase revenue, strengthen loyalty, and retain customers.

- Initial Sale to First Inspection: Capture and centralize customer data for proactive service.
- Annual Maintenance Contracts: Engage customers at 9–12 month intervals to secure recurring revenue.
- Upgrades and Retrofits: Generate revenue between 5–12 years with targeted component upgrades.
- End-of-Life: Anticipate replacements 12 months before equipment retirement to prevent competitor entry.

Industriality provides the data visibility and predictive insights needed to manage this lifecycle effectively. With our AI-powered platform, manufacturers can extend asset lifespans, capture aftermarket opportunities, and build long-term customer relationships.

# Customer Testimonial

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"Industrility helped us realize our 10-year vision of delivering a digital experience for our industrial boiler rooms in a matter of weeks. Truly a trusted partner in our success."

-Vice President of Account Management and Strategy, Industrial Boiler Manufacturer

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# Contact Information

Industrility specializes in helping OEMs and industrial manufacturers unify siloed data, improve service visibility, and unlock new aftermarket revenue streams. To explore how a tailored data transformation project can drive results for your business, visit [www.industrility.com](http://www.industrility.com) or email [contact@industrility.com](mailto:contact@industrility.com).

