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LOGICLINE · WORKING GUIDE

Selling Service to the Installed Base

Which data you need per machine, which sales triggers follow from it, and how marketing, sales and service work them together.

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SUMMARY

The difference is not the offer. It is knowing which machine to call.

Manufacturers with a proactive, contract-driven service model achieve an average 48% EBIT contribution from service. Reactively organised competitors reach about 15%. Both sell the same work. The difference happens earlier: one side knows which machine will produce a trigger and when, the other waits for the phone to ring.

48%
EBIT contribution from service, proactive and contract-driven model

15%
EBIT contribution with reactively organised service

25%
share of service in total revenue in machinery and equipment

2–3×
lifecycle aftermarket revenue versus the new machine

Figures: Roland Berger / KVD 2026 · BCG · McKinsey.

01 **The installed base is a sales list.**
Every machine you have shipped produces predictable triggers over its life. That requires eight fields per machine, not eighty.

02 **Sales triggers are finite and nameable.**
Ten of them cover most of the ground, from warranty expiry to repeat failure. Each has a signal that can be derived from data you already hold.

03 **A trigger without an owner is never worked.**
The three handover points between marketing, sales and service decide more than any tool.

04 **The field technician is the most credible voice in service sales.**
They see condition, repeat failures and unused functions. In most organisations that observation flows nowhere.

05 **One machine type is enough to start.**
Waiting for complete data across the portfolio means never starting. This guide ends with a 90-day plan for exactly one type.

PART I · THE FOUNDATION

Your sales list is already standing at the customer's site.

Every machine you have shipped is a customer that generates demand for years or decades: wear parts, maintenance, repairs, training, retrofit, eventually replacement. The sum of those machines is the most complete list of prospects a manufacturer owns. It is paid for, qualified, and needs no lead generation.

It is rarely used all the same. The most common reason is mundane: nobody can pull the list. Serial numbers sit in ERP, the operator in CRM, contract status in a folder, service history in tickets and field reports. Every piece exists, but no two can be joined reliably.

The usual reflex is to launch a data project across the entire portfolio first. That takes a long time and delivers nothing that reaches sales in the meantime. The faster route starts with one machine type with high unit numbers, and with the fields that actually produce a trigger.

Which ones those are is on the next page. There are eight. If two are missing, most triggers can still be formed; if the serial number or the current operator is missing, nothing works.

One qualification up front: treat completeness as a metric. You measure the coverage rate, work with the share of machines that is complete, and close gaps where they actually block a trigger.

SCOPE

This guide assumes the decision to invest in service has been taken. Whether and why that investment pays is covered in the whitepaper **“Service in Machinery & Equipment: The Underestimated Business”**, with market figures, entry paths and the business case for the internal decision. What follows here is the work after that decision.

PART I · DATA MINIMUM

Eight fields per machine.

	FIELD	WHAT IT IS NEEDED FOR	WHERE IT USUALLY SITS
01	**Serial number or unique asset ID**	Every link depends on it. Without it there is no history per machine	ERP order, production records
02	**Shipment and commissioning date**	Age, warranty expiry, maintenance intervals, retrofit readiness	ERP, shipping and acceptance papers
03	**Build state and configuration**	Which spare part fits, which upgrade is possible	Bill of materials, engineering
04	**Current operator and site**	Who to approach, which territory. Often stale after a change of ownership	CRM, sales, technician knowledge
05	**Contract status and term**	Measuring contract coverage, using expiry as a trigger	Contract filing, rarely in a system
06	**Service history per machine**	Condition, repeat failures, something to open the conversation with	Tickets, field reports, mostly free text
07	**Parts installed**	Wear forecast and your share of parts demand	Field reports, stock movements
08	**Usage or telemetry, where available**	Condition-based triggers instead of calendar logic	Machine control, IoT connection

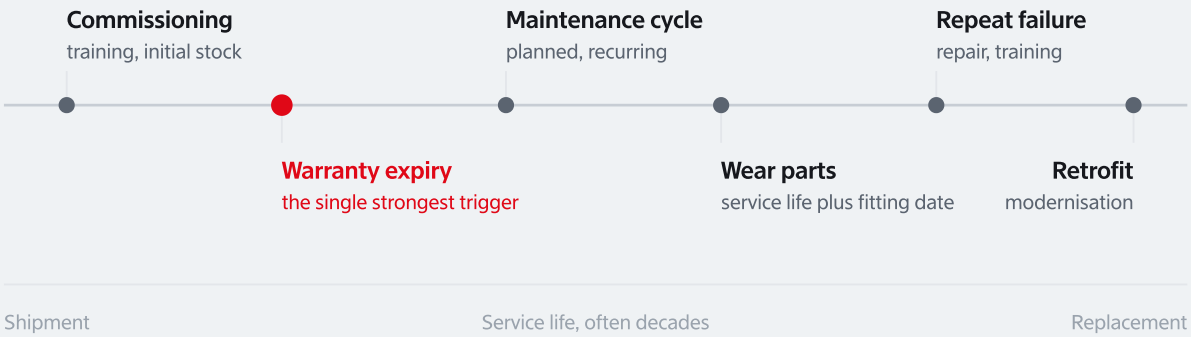
The first four decide everything. With serial number, date, build state and operator you can already form warranty expiry, maintenance due, retrofit readiness and contract expiry. Fields 05 to 08 improve precision and the quality of the conversation, but they are not a condition for starting. Begin by checking how many machines of one type carry the first four fields completely. That number is your coverage rate and the first metric in this guide.

PART II · THE TRIGGERS

A machine announces itself — in patterns.

Sales triggers in service look random as long as you look at them one at a time. Across the life of a machine they fall into order. Most are fixed in time, some depend on condition, a few on events at the customer.

SALES TRIGGERS ACROSS THE LIFE OF A MACHINE



Spacing is schematic and depends on machine type and duty profile. What matters is the sequence.

> **FOUR TRIGGERS DO NOT DEPEND ON AGE**
>
> **Contract expiry · change of owner or site · staff turnover at the customer · unused functions.** These four occur independently of service life and cannot be derived from a date. They arise from a master data change or from an observation in the field — which is precisely why Part III puts so much weight on the return channel from service.

PART II · CATALOGUE

Ten triggers, ten signals.

	TRIGGER	SIGNAL IN THE DATA	WHAT YOU OFFER
01	**Warranty expiry**	Commissioning plus warranty term, 90 days ahead	Service contract
02	**Contract expiry**	Contract end minus 90 days	Renewal, higher service level
03	**Maintenance due**	Interval or operating hours reached	Maintenance visit with parts package
04	**Wear part cycle**	Last fitting plus typical service life	Spare parts or stocking package
05	**Repeat failure**	Several cases on the same asset in a short window	Repair, retrofit, operator training
06	**Age and technology level**	Build year and state against the current series	Retrofit, modernisation, replacement
07	**Change of owner or site**	Master data change, note from the technician	Commissioning check, training, new contract
08	**Staff turnover at the customer**	Cluster of operating errors, training requests	Training, assistance and knowledge access
09	**Unused functions**	Configuration against actual usage	Activation, extension, briefing
10	**Idle without a ticket**	Drop in usage in the telemetry	A call and a look at the cause

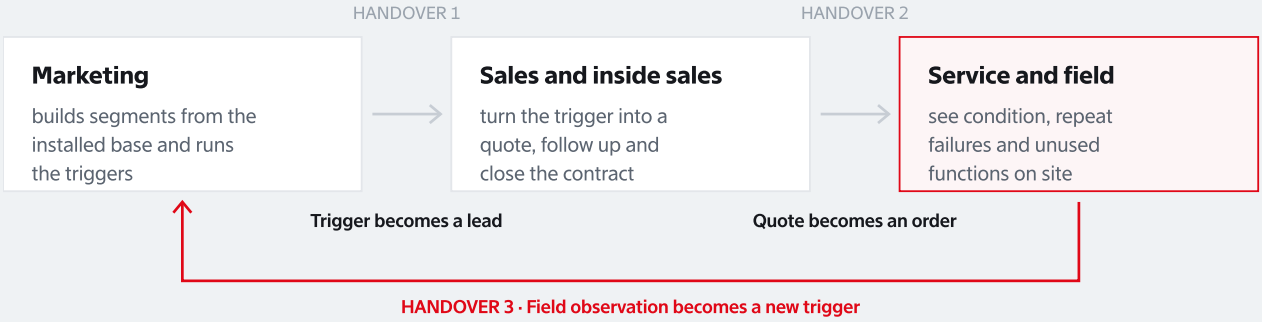
Triggers 01 to 04 are enough to start. They need only the first four data fields, they apply to every machine in the base, and they can be written as a rule that produces lists on its own once it is set up. Triggers 05 to 10 are more valuable case by case, but harder to detect. Add them once the first four are running. And not every machine of the type is a candidate: customers who maintain their own equipment buy parts and individual call-outs, not full contracts. Split the list by service behaviour before the inside sales team works it.

PART III · ROLES AND HANDOVERS

Three parties, three handover points.

Service sales programmes fail at the handovers more often than at the tools. A trigger with no named owner is never worked, and an observation from the field that lands nowhere is lost.

WHO CONTRIBUTES WHAT, AND WHERE IT IS HANDED OVER



Handover 3 is the one most often missing. It decides whether the catalogue in Part II improves over time or stands still.

In practice: every trigger in the catalogue gets a named owner and a deadline by which it must be worked. For handover 3, a mandatory field in the field report is enough to begin with, offering three answers: condition noticeable, function unused, training need apparent.

A mandatory field does not fill itself. The tip has to pay off for the person giving it. A lead fee rewards qualified tips from the field force and product sales; when the deal closes, both the source and service sales benefit (KVD/FIR 2025). The same logic applies one level up: a closing commission rewards the single transaction, a recurring commission on contract revenue rewards the contract.

PART IV · FROM TRIGGER TO ORDER

Four steps that repeat.

STEP 1

The list

A rule produces the machines the trigger applies to today. Continuously, not once — otherwise the trigger turns into a campaign and the campaign into a project.

Check: does the rule produce a list, unattended, that someone can work tomorrow?

STEP 2

The offer

One prepared building block per trigger, with scope, price range and value argument. For contract triggers that means a tier from a named model — three tiers are the market standard, and functional names carry better than bronze to gold (Argon & Co 2026). Without the block every case is priced from scratch.

Check: is there a price at the end? “We'll be in touch” is not an offer.

STEP 3

Outreach and follow-up

First contact can be automated, following up belongs to a person. Two contacts across two channels within three weeks is a workable starting point.

Check: can you see who spoke to the customer last, and when?

STEP 4

The return

Every outcome is recorded on the asset, including the rejection and its reason. That is how the rule learns: which triggers carry, which arguments work, which timing was too early.

Check: after one quarter, can you say which trigger converts best?

ON THE TOOLING QUESTION

These four steps require contract, asset and case data to meet in one place, and rules to be allowed to run on them. Whether that happens in your CRM platform, in a service management system or for now in a well-kept spreadsheet is secondary — as long as the list is produced automatically and the outcome lands on the asset. As unit numbers grow, spreadsheets stop carrying this job.

PART V · METRICS

Seven numbers that show progress.

Service revenue on its own does not tell you whether the programme works — it also rises when more machines break down. The following metrics separate the two.

	METRIC	WHAT IT SHOWS	HOW TO GET THE BASELINE
01	**Coverage rate**	Share of machines with the mandatory fields complete	A count across one machine type
02	**Contract coverage**	Share of machines under a service contract	Contracts against installed base, per type
03	**Trigger to quote**	How many detected triggers lead to a quote	Measurable once triggers are produced as lists
04	**Quote to order**	Win rate per trigger type	From last year's quotes, as far as they can be attributed
05	**Service revenue per machine per year**	Whether the same base carries more	Service revenue of the type divided by machines in the field
06	**Share of recurring revenue**	Predictability rather than one-off business	Contract and subscription revenue as a share of service revenue
07	**Share of parts demand**	How much of the expected wear demand is ordered from you	Expectation from service lives against actual orders

Two are enough to begin. Coverage rate and contract coverage can be established without new systems, and both move visibly once the programme takes hold. Metric 07 is the most interesting and the most laborious; it is an estimate and stays one. Measure per machine type, not across the portfolio — otherwise every effect disappears into the average.

PART VI · THE FIRST 90 DAYS

One machine type, two triggers, one measured result.

DAY 1 TO 30

Make the base visible

- Pick one machine type with high unit numbers and an active aftermarket
- Bring the four mandatory fields per machine together from ERP, CRM and contract filing
- Establish and record coverage rate and contract coverage
- Name the gaps, but only close those that block a trigger

DAY 31 TO 60

Sharpen two triggers

- Write warranty expiry and contract expiry as rules, with 90 days of lead time
- One offer building block per trigger, with scope, price range and value argument
- Name owners and a working deadline for each trigger
- Introduce the mandatory field for the technician's observation

DAY 61 TO 90

Run it and do the maths

- Work the lists, follow up twice, record every outcome on the asset
- Evaluate trigger-to-quote and quote-to-order per trigger type
- Put the result against the effort and sharpen the rules
- Only then add the second machine type

Why so small. One pass across a single type gives you defensible conversion figures after three months. That is what justifies the rollout internally — with your own numbers rather than industry benchmarks. Started across the whole portfolio, the same proof arrives a year later at the earliest, and until then the programme runs on assumptions.

COMMON MISTAKES

Six traps that cost time.

01 **Waiting for complete data.**

The coverage rate will never reach 100%. Work with the share of the base that is complete and close gaps where a trigger demands it.

02 **Triggers without an owner.**

A list nobody is named for will not be opened again in week two. The name and the deadline belong to the rule.

03 **Outreach without an offer.**

Pointing out an approaching warranty expiry generates no revenue. It takes a named scope with a price range, otherwise the conversation ends politely.

04 **Leaving the technician out.**

They are on site, they are asked, and they are believed. Without a return channel for their observations the programme loses its most valuable source.

05 **Starting too big.**

All machine types at once means long preparation with no result. One type delivers a number in 90 days that you can work with.

06 **Producing lists nobody can work.**

In service, technician capacity limits achievable revenue, often more tightly than the number of machines in the field. Before you switch a rule on, check which hours sit behind the list, and start with the triggers whose revenue rests on parts, remote work and contracts.

> *“Proactive service is a list that is produced fresh every morning, and a name standing behind it.”*

THE CORE MESSAGE IN ONE SENTENCE

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ABOUT LOGICLINE

We turn the installed base into a growth driver.

logicline helps manufacturers of machines, plants and equipment map their installed base in a structured way, digitize service processes end to end and ground service decisions with AI. More than 30 years of industry experience, stage by stage, with a concrete return at every step.

IF PART I IS THE HURDLE

Installed Base Assessment

A sober assessment of where you stand: how completely your installed base is captured, which triggers can be formed from it today, and where the biggest lever lies.

IF YOU WANT TO JUDGE IT YOURSELF

Service Data Readiness Check

Ten questions, about five minutes. You see straight away which dimension holds you back most, and receive the prioritised first steps.
logicline.de/en/service-data-readiness-check

CONVERSATION · AUTHOR · PUBLISHER

Edgar Schueber, CEO and Founder · logicline GmbH

Twenty minutes to frame your situation: **cal.eu/edgar.schueber/20-min-meeting**
Figures in this guide: Roland Berger / KVD 2026 · McKinsey · BCG. Further sources: KVD/FIR 2025 · Argon & Co 2026 · Advyce 2025. Further background in the whitepaper “Service in Machinery & Equipment: The Underestimated Business”, **logicline.de/en/downloads**