



## CASE STUDY

295K

T1 & T2 Calls Annually

7 mins

Average Handle time

120

Days to train Agents

## Results

The implementation of Agentforce, Data Cloud, and AI has transformed METUS's customer service operations.

- Efficiency & Productivity
  - Reduced time to resolution,
  - Decreased Average Handle Time (AHT)
  - Call deflection
- Quality Assurance
  - Improved First Call Resolution (FCR)
  - Increased customer satisfaction (NPS/CSAT)
  - Reduced Escalations
- Employee Engagement & Satisfaction
  - Reduced Onboarding Time
  - Improved Advisor Satisfaction
  - Reduced Advisor Turnover
  - Improved employee CSAT

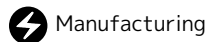
## Solution

Uptima delivered a comprehensive solution to transform customer operations

- **Unified Customer Data** - Tier 1 agents, the face of METUS, now have access to our entire product knowledge base within Salesforce.
- **AI-Powered Intelligent Assistance** - AI emulates an experienced agent; providing context-aware responses to queries. Agents can now receive accurate information on specific parts or issues within seconds in Salesforce
- **Enhanced Tier 2 Support** - AI-generated summaries of escalated issues eliminate the need to sift through extensive case notes.
- **Advanced Customer Self Service Options** - METUS implemented an Einstein Chat Bot that can seamlessly tie into Uptima GenAI. This solution offers quick, accurate responses to both technicians and homeowners, leveraging the same knowledge base used by agents.
- **Digital Pocket Guides** - Uptima GenAI will replace the need for printed pocket guides, and will be available via mobile devices, eliminating printing costs and ensuring that information is always accurate. This digital transformation also allows for real-time updates and personalized information delivery based on the user's role and needs.

## Fortune 500 HVAC Manufacturer

### Industry Alignment



### Customer's Business Objectives

Customer wanted to transform service operations by providing personalized, efficient, and effective customer support by implementing a best-in-class AI and service solution, so METUS can achieve service excellence at scale

### Pain Points Uptima AI helped Satisfy:

- Call volume is increasing YoY
- Siloed data and complex manuals
- Call/Chat/Email mix is changing
- Offering expansion

### Services

- Transformation & Implementation Services

### Products

- Agentforce
- Data Cloud
- AI

salesforce

PARTNER