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STAR Awards
2025

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Featured Application

Category: Innovation in AI Use Cases in Industrial Equipment Companies

Smarter Systems: Incorporating AI into Our Legacy Workflows

Overview

Rockwell Automation (RA) is a century-strong leader in industrial automation. Unlike cloud-native companies, RA was forged in the factory - its systems and processes born in the physical world. Regardless, innovation has been a cornerstone of RA throughout our history, and we embrace the opportunity to strategically enhance elements of our customer support workflows through artificial intelligence (AI).

By creating our own AI tools alongside trusted third-party AI applications we were able to elevate our customer experience through streamlining ticket resolution and customer engagement in ways that were impossible with our systems before. These data-driven innovations save thousands of hours annually, improve service-level agreement (SLA) compliance, and enhance customer satisfaction globally.

Our Challenge

Across the enterprise, our teams faced the following challenges:

- **Inefficient Ticket Routing:** Tickets for Customer Care (just-in-time customer support) are created in several ways: calls, emails, chats, and online forms are all captured within the Oracle Service Cloud platform. However, due to the variety of ways to submit tickets – many were often misrouted within our Oracle platform. Furthermore, the process to troubleshoot these misrouted tickets was manual which led to delays in ticket re-routing and resolution.
- **Meeting Documentation and Siloed Views on Customer Sentiment:** Customer Success Managers (CSMs) (long-term customer support) spent significant time manually summarizing meetings and updating our Customer Success Platform (CSP) leaving less time for strategic engagement and relationship building with customers. Furthermore, the only customer information CSMs could access was the information they gathered themselves. With several other teams communicating with our customers (product development, sales, tech support, customer care) – customer success was lacking the breadth of our customer's sentiment from interactions across the organization.

Our AI Solutions

To address these challenges, RA implemented two AI-powered solutions:

1. **TRACIE (Ticket Routing Analysis and Customer Intent Engine):** This custom-built tool analyzes our Oracle ticket routing logs to identify misrouted tickets, understand customer intent, and optimize routing rules. This home-grown tool transforms our manual and reactive processes into intelligent, proactive workflows.



2. **Customer Intelligence Platform (CIP):** By integrating a CIP with Microsoft Teams, Outlook and our CSP - we automate meeting transcriptions, summarizations, and CSP updates. This eliminates manual entry and ensures consistent, timely documentation. Our CIP also offers our CSMs (and other customer-facing teams) a broader view of customer sentiment by quickly automating query summaries based upon aggregated customer-facing communications across RA. This allows our CSMs a more complete understanding of what our customers are facing across the enterprise and strategically work with them to improve the customer experience throughout the contract lifecycle.

Key Wins

TRACIE

TRACIE provides deep insights into rule performance, customer intent accuracy, and the misrouting of tickets. With TRACIE, teams are fine-tuning routing rules to reduce ticket resolution delays, improving SLA compliance, and enhancing customer satisfaction.

TRACIE directly benefits field service teams by optimizing ticket routing and customer intent analysis. This ensures that tickets are routed to the right teams (at the right time), reducing misrouting and improving resolution times. If the customer needs, wants or requires field support, TRACIE identifies this intent better than the rules engine alone today.

TRACIE is currently being tested for scale (100,000+ tickets) and additional use cases.

CIP and CSP Integration

By automating contact management and meeting logging, we achieved a total ROI of 3,200 hours saved annually, equivalent to 1.5 full-time employees (FTEs). This transformation has improved productivity, enhanced customer insights, and created a scalable model for AI-driven customer success operations.

- 3,200 hours saved annually, equivalent to 1.5 FTEs.
- 0.8 FTE saved through automated contact management.
- 0.74 FTE saved through automated meeting logging.
- Increased Customer Touchpoints: Freed-up time allowed for more proactive customer engagement.
- Improved Data Quality: Standardized summaries and contact data improved cross-functional visibility and decision-making.
- Employee Satisfaction: CSMs reported higher job satisfaction due to reduced administrative burden.

"Our CIP enables us to get a full picture of an account's health that no one person would be able to do otherwise. We've built CTAs [Calls to Action] on sentiment and risk - based on the CIP's analysis of communications across all customer-facing teams - to be triggered in our CSP making our next steps quick and clear." - Kyle M., RA Customer Success Regional Manager

Looking Ahead

RA is committed to scaling these innovations across our global operations. Future phases of TRACIE will include scaling pilots, additional use cases, real-time data integration and expanded persona support. Our CIP will continue to evolve with deeper CSP integration and advanced sentiment analytics.

These initiatives are more than tools—they represent a cultural shift toward intelligent, customer-centric service. By embedding AI into our workflows, we're not just solving problems—we're balancing the line.



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