

INDUSTRY | TECHNOLOGY

Tech company



This company is an all-in-one call center software that intelligently connects agents with more leads in less time. They empower businesses to maximize efficiency, boost productivity, and grow their revenue—all at an affordable cost.

Challenge

The client needed a streamlined way to identify contacts, provide self-service troubleshooting resources, and enhance case management. Their existing process required manual effort to associate users with accounts and lacked an efficient method for capturing issue details. This led to delays in support resolution and an increased workload for agents.

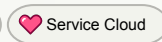
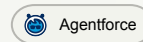
- The system needed a way to recognize existing contacts or create new ones linked to the appropriate account.
- Users had no access to knowledge articles for troubleshooting, leading to unnecessary case escalations.
- Cases created at the start of a session lacked detailed issue context, making it harder for reps to diagnose and resolve problems efficiently.
- Without pre-filled case details, support agents had to spend extra time gathering information from users.

Solution

To address their challenges, we implemented the following solution:

- **Automated Contact Identification** – Utilizes the existing inbound flow to capture gateway information and associate users with the correct account.
- **Dynamic Case Updates** – The agent updates the subject, reason, and description fields in real time based on the conversation, ensuring cases contain relevant details.
- **Intelligent Troubleshooting** – Provides users with step-by-step troubleshooting guides before escalating to live support.
- **Smart Case Routing** – Transfers unresolved cases to a live agent based on the case type, which is determined at the start of the session.
- **Improved Support Efficiency** – Reduces manual effort for agents by pre-filing case details and filtering simple troubleshooting requests before escalation.

PRODUCTS USED



Outcome

By the end of the project, our client could:

- **Automatically identify** contacts using gateway information and associate them with the correct account.
- **Provide self-service troubleshooting** through AI-driven knowledge articles, reducing the need for live agent intervention.
- **Ensure case details are dynamically updated** in real time, giving support agents complete context before engaging with a user.
- **Efficiently route unresolved cases** to the appropriate live agent based on the issue type, improving response times.
- **Enhance overall customer support** efficiency by reducing manual effort, streamlining case management, and improving user experience.

