

INDUSTRY | WATER TREATMENT

Water treatment company



This company provides water treatment solutions, serving clients across Texas and surrounding states. They provide tailored water filtration systems designed to meet the diverse needs of residential, commercial, and industrial customers.

Challenge

This company provides water filtration equipment and services, requiring an efficient way to support customers with troubleshooting, equipment resets, and maintenance scheduling. However, customers often struggle to find the right information or schedule service appointments efficiently. The challenge is to create a seamless, self-service experience within the customer portal while ensuring quick access to product knowledge and support.

- Customers struggle to troubleshoot filtration system issues independently.
- Difficulty in finding relevant product knowledge and reset instructions.
- Inefficient scheduling process for maintenance and service appointments.
- Need for a user-friendly, self-service portal that reduces reliance on live support.

Solution

To streamline customer support and service management, we implemented a Field Service Appointment Booking Agent that:

- **Enables Self-Service Scheduling** – Customers can book service appointments directly within the portal without manual intervention.
- **Provides Instant Troubleshooting Support** – Leverages product documentation to offer quick answers on filtration system issues.
- **Guides Equipment Resets & Maintenance** – Delivers step-by-step instructions for common system resets and upkeep.
- **Reduces Support Call Volume** – Automates assistance to minimize the need for live agent interactions.
- **Offers 24/7 Customer Support** – Ensures round-the-clock access to knowledge and scheduling tools for improved customer satisfaction.

PRODUCTS USED



Agentforce



Service Cloud

Outcome

By the end of the project, our client could:

- **Enable Seamless Self-Service** – Customers can schedule service appointments without needing live support.
- **Provide Instant Troubleshooting** – Quick access to product documentation for resolving common issues.
- **Reduce Support Call Volume** – Automated assistance minimizes the need for direct customer service interactions.
- **Improve Customer Satisfaction** – Faster resolutions and 24/7 support enhance the overall experience.
- **Streamline Maintenance Management** – Customers can easily find reset instructions and maintenance steps, ensuring their filtration systems run smoothly.

