

CX Transformation Projected to Save Fortune 500 Company \$3.9 Million Annually

A leader in HVAC, fire, and security services transforms fragmented contact center operations to drive measurable ROI

Project Summary

A Fortune 500 company specializing in HVAC, fire safety, security, and building automation systems engaged COPC Inc. to address long-standing fragmentation across its North American contact center ecosystem. With more than 400 agents handling over 235,000 monthly calls across HVAC, fire safety, and security divisions, the organization operated with disconnected systems, inconsistent processes, and limited visibility into customer experience performance.

Some specific pain points the company was experiencing were:

- **30% of HVAC callers were misrouted or redirected** due to disconnected entry points and confusing IVR menus.
- **21% of IVR callers made erroneous inputs**, signaling widespread customer confusion.
- **Three separate technology ecosystems** operated independently with no integration.
- **Self-service completion was only 6.4%**, despite inflated vendor-reported success rates.
- **Agent occupancy averaged 49%**, driven by low volume, extended hours, and limited WFM capabilities.
- **No email performance measurement existed**—only volume was tracked.
- **Metrics definitions varied across divisions**, with no alignment to industry standards.
- **WFM tools lacked multi-skilled functionality**, resulting in more than 7 FTEs of avoidable inefficiency.

COPC led a multi-phase engagement spanning IVR optimization, metrics development, workforce management, and CX technology evaluation. The work uncovered systemic issues that had gone undetected for years and provided a clear roadmap to unify operations, improve routing accuracy, and strengthen CX.

Project Objectives

- Diagnose IVR performance, routing accuracy, and customer effort.
- Identify operational fragmentation and opportunities for consolidation.
- Develop a unified metrics framework aligned to the COPC CX Standard.
- Evaluate Natural Language IVR and workforce management technologies.
- Establish a scalable roadmap for enterprise-wide CX transformation.
- Provide implementation oversight for IVR improvements.

Solution

COPC delivered a structured, multi-phase program that combined deep operational diagnostics with technology expertise. Each phase built toward a unified, enterprise-wide CX strategy.

Phase 1 — Conducted HVAC IVR Assessment

COPC conducted a comprehensive review of the HVAC division's IVR, analyzing **1,596 points of contact** across phone and email channels. The assessment revealed five root causes of misrouting:

- Poor points of contact hygiene
- Confusing press paths
- Excessive transfers
- IVR bypass behavior
- Configuration errors

Outcome: COPC designed a future-state IVR incorporating Dual-Tone Multi-Frequency (DTMF) optimization, Automatic Number Identification (ANI) based intelligent routing, and Natural Language capabilities. A best practices workshop equipped 12 stakeholders with the knowledge to support long-term improvements.

Phase 2 — Developed Contact Center Metrics Framework

Through **stakeholder interviews**, COPC assessed existing metrics, reporting, and data governance. The work uncovered significant ACW variation, resulting in 114 excess ACW hours per month, and highlighted gaps in service-level targets, email measurement, and reporting consistency.

Outcome: The team developed a comprehensive **Performance Measurement Framework** aligned to the COPC CX Standard, establishing consistent definitions, targets, and formulas across all business lines.

Phase 3 — Assessed Fire & Security IVR

COPC extended the IVR assessment to the Fire and Security divisions, covering **150 agents and 215,000+ calls per month**. The team evaluated the Natural Language platform and identified critical gaps in billing, alarm-related intents, and speech-to-text accuracy.

A Key Finding: the “Place System on Test” self-service flow had a true completion rate of **6.4%**, well below the vendor-reported success rate.

Outcome: COPC delivered a Natural Language improvement package including an intent catalog, utterance examples, and integration recommendations.

Phase 4 — Provided HVAC IVR Deployment Oversight

COPC provided senior engineering oversight for the implementation of Phase 1 recommendations, guiding architecture, configuration, testing, and cutover readiness to ensure a smooth, controlled deployment.

Strategic Impact

COPC's enterprise-wide assessment shed light on previously hidden challenges, providing the organization with actionable insights and opportunities. The assessment:

- Revealed systemic misrouting and customer effort issues
- Exposed inaccurate vendor-reported self-service metrics
- Delivered a unified, COPC-aligned metrics framework
- Identified three technology silos and a path toward consolidation
- Unlocked opportunities for cross-skilling and workforce efficiency
- Established a multi-year roadmap for CX transformation

What started as an HVAC assessment for a single division quickly evolved into a comprehensive enterprise-wide program, demonstrating the client's deep confidence in the value delivered by COPC.

The client significantly reduced customer effort, eliminating up to 30 steps and 26 minutes from repair journeys. They also anticipate a **5% increase in call deflection and a 6% increase in first call resolution.**

Projected ROI

\$2.3M in annual savings from full IVR deployment

\$1.25M in savings from cross-skilling and operational consolidation

\$350K+ in annual WFM efficiency gains (7+ FTEs)

About COPC Inc.

COPC Inc. provides consulting, training, certification, benchmarking and research for operations supporting the customer experience. The company created the COPC Standards, a collection of performance management systems for customer experience operations, customer experience management, vendor management and procurement. Founded in 1996, COPC Inc. began by helping call centers improve their performance. Today, the company is an innovative global leader that empowers organizations to optimize operations to deliver a superior service journey. COPC Inc. headquarters are in Winter Park, FL, U.S., with operations in Europe, the Middle East, Africa, Asia Pacific, Latin America, India and Japan.