

CASE STUDY

LEE COMPANY REVAMPS FIELD SERVICE OPERATIONS WITH INRULE REDUCING INTAKE TIME BY 80% AND SAVING THOUSANDS

“Within three to four months, InRule will pay for itself,”

Chris Reaves, Lee Company, Director IT



Founded in 1944, Lee Company has grown to one of Tennessee's largest mechanical engineering, facilities and home services companies with \$300 million in annual revenue and more than 1,600 employees. The firm provides HVAC, plumbing, electrical, appliance repair and facility improvement solutions to government, commercial, health care and industrial organizations and homeowners.

THE CHALLENGE

A year and a half ago, Lee Company migrated all field service operations to Microsoft Dynamics® 365 and Power Automate. To speed call times and improve overall support efficiency, the company sought an automation provider who could equip its call staff to quickly gather vital caller intake information within Microsoft Dynamics. They needed a decisioning platform with the power and usability to create and automate all its rules and workflows, beyond the capabilities of Power Automate.

Each customer rep at Lee Company handles 60 to 70 calls each day. Setting up a new customer required significant time, upwards of 75% of call times. Having to manually complete several information fields, requiring multiple record checks took call operators upwards of ten minutes. This was all time spent before even addressing the customer's needs.

Having no developers on staff, Lee Company needed a no-code automation solution that could accommodate complex rules and still be easy to update. Power Automate helped speed the intake process. However, its Microsoft application could not change rules while a customer record was open.

SOLUTION

To provide a dynamic automation solution to speed call-center operations, Lee Company turned to InRule®, a Leader in [The Forrester Wave: AI Decisioning Platforms, Q2 2023 report](#). Lee Company chose InRule because it integrates smoothly with [Dynamics](#) and Power Automate, as well as disconnected legacy systems, with minimal IT support required.

The flexibility and dynamic-updating capability of InRule gave Lee Company the right mix of AI power. Its team of citizen developers can create, test and deploy as many rule sets as needed to accommodate and power its customer support specialist to serve its various customers and property types.

The compatibility of [InRule's SaaS platform](#) provides Lee Company an unexpected bonus time savings.

Instead of having to create a new customer form from scratch, customer reps can update and complete account forms created previously simply by pushing the “Run Rules” button.

RESULTS

Powered by InRule, call-center staff can now serve new customers much quicker and more efficiently. After gathering initial contact information, using one of five rule sets, determined by property type, staff can auto-fill detailed intake information simply by pushing the “Run Rules” button. The InRule platform calls out to and grabs the remaining data from listing services such as Zillow and public records and instantly feeds the info back to Dynamics.

Lee Company went live with InRule in just over a month and is already enjoying real results. Leveraging InRule, Lee Company reduced intake times from ten minutes or more to less than two minutes. The company projects savings of over eight hours per day, amounting to \$73,000 per year.

Beyond time and money savings, Lee Company is also enjoying a boost in call-center morale with happier staff who are better able to quickly meet customer needs and move on to the next caller in line. “Within three to four months, InRule will pay for itself,” comments Chris Reaves, Lee Company Director IT.

On the heels of its first InRule success, Lee Company is planning to automate its case-creation form. Call-center staff creates over 1,000 cases each day. Chris anticipates a time savings of 30 seconds to a minute per form, potentially saving 16 hours per day, double its current savings.

Other applications of decision automation, and the potential deployment of the full arsenal of InRule, featuring process automation and machine learning, may yield Lee Company greater speed and efficiencies still. Chris summarizes the company’s enthusiasm for its results thus far and where it might go, “we’re still early in our journey with InRule and have so many more processes we can optimize with automation.”

ABOUT INRULE

InRule Technology® is an AI Decisioning company providing integrated decisioning, machine learning and process automation software to the enterprise. By enabling IT and business leaders to make better decisions faster, operationalize machine learning and improve complex processes, the InRule® Intelligence Automation Platform increases productivity, drives revenue, and provides exceptional business outcomes.

More than 500 organizations worldwide rely on InRule for mission critical applications. InRule Technology has been delivering measurable business and IT results since 2002. Learn how to make automation accessible at www.inrule.com. Experience InRule for yourself. [Request a free demo](#)