

upland  
**InGenius**

**Case Study**

# SPI Health and Safety streamlines its customer service with the InGenius connection



## INDUSTRY

**Workplace Health and Safety**

## COMPANY

**SPI Health and Safety  
Canada**

[www.spi.com](http://www.spi.com)

A Canadian leader in goods and services related to occupational health and safety, SPI Health and Safety offers both complete and specialized solutions, encompassing the distribution of products, technical services, fire protection services, consulting and training. Founded in 1972, SPI Health and Safety is a fast-growing company that now has more than 30 points of service across Canada.



Today, **SPI Health and Safety** serves a multitude of industries including Mining, Construction, Energy, Manufacturing, Transportation and more. As it grew over the last 50+ years, it had more specialized industries to serve but lacked a way to properly route its incoming calls based on customer data that was stored on its CRM. SPI Health and Safety turned to InGenius to optimize its customer service operations by integrating its Salesforce CRM system with its Cisco UCCX telephony system.



# Fragmented operations led to poor customer service

## Serving multiple industries without appropriate call routing and information access

Top-notch customer service is imperative for every industry. But when it comes to fully examining, assessing, and carrying out workplace health and safety plans, there's little room for error. SPI Health and Safety was looking for a way to fully optimize its customer service operations. One of its main challenges was agents weren't able to efficiently dispatch incoming calls for SPI's very specific customer categories.

SPI Health and Safety was looking for a way to seamlessly integrate their Salesforce CRM to their telephony system in order to offer advanced call routing for its customers. It's through this effort they would be able to enhance the overall customer experience by providing an added layer of personalization and quicker access to information.

## How the InGenius computer telephony integration helped enhance customer service

SPI Health and Safety's Cisco UCCX telephony system wasn't operating at the level it needed to provide a great customer experience. It lacked the advanced capabilities, including call routing, required to effectively streamline its customer service operations. After implementing Salesforce Service Cloud, SPI Health and Safety knew it needed a way to connect its CRM with its phone system.

The biggest challenge prompting SPI Health and Safety to seek a Computer Telephony Integration (CTI) product was the inability to efficiently route calls based on existing customer data that was in Salesforce. They needed a solution that could help access details to identify major customers and their respective industries to improve service quality. Essentially, SPI needed a solution to serve as a glue between its CRM and their telephony system to facilitate that access.

After having key stakeholders from IT, customer service, and management evaluate their options, SPI Health and Safety turned to InGenius for that vital connection. SPI Health and Safety ultimately chose InGenius due to its robust Salesforce integration capabilities, proven track record, and positive references from other customers. The team was drawn to InGenius for its ability to meet their specific needs effectively.

*"We know InGenius will play a crucial role in supporting our future growth with a more efficient and personalized customer service, which is essential for expanding our client base and overall customer experience."*

**Marc-Antoine Vachon**  
CRM Analyst



# Enhancing service support for a better experience

## The ultimate benefactors of installing InGenius—The SPI Health and Safety customer

After implementing InGenius, SPI Health and Safety saw significant improvements in its customer service and overall agent productivity. It's because of the integration between Salesforce and Cisco UCCX that the company was able to provide a more personalized and efficient support experience to its customers. Every call was directed to the right agents based on the associated CRM data. Essentially, InGenius was able to streamline workflows and reduce SPI Health and Safety's manual processes.

SPI Health and Safety utilized InGenius to automate its call routing, access CRM data during calls, and provide agents with real-time customer information to enhance support quality levels.

*"The InGenius support team supported us very well during our support calls. They demonstrated openness and willingness to resolve our technological challenges linked to the complexity of the route call implemented. Support agents can adequately direct us towards rapid resolution options in order to minimize down time."*

**Marc-Antoine Vachon**  
CRM Analyst

**Upland InGenius** helps organizations increase agent productivity and earn happier customers with a seamless connection between your business phone system and your CRM. Deliver better service, sales, IT and HR support with our CTI solution.