

CASE STUDY

Turning Customer Service Into an Automated Operational Intelligence System

How VendorVita helped a fast-growing beverage company cut daily customer service work from 6-8 hours to 1-2 hours while automating customer interactions, reporting, data capture, and carrier claims.

6-8 hrs

MANUAL CS WORK BEFORE

1-2 hrs

DAILY WORK AFTER

4-7 hrs

SAVED EACH DAY

Built from scratch by VendorVita around the client's real policies, sales channels, products, fulfillment workflows, and escalation rules.

CLIENT PROFILE

A fast-growing beverage company shipping hundreds of thousands of orders across major e-commerce channels.

Channels include Amazon, Walmart, Shopify, and direct-to-consumer commerce.

The Challenge

As the company grew, customer service became an increasingly complex operational function. Every incoming request could require research across multiple systems: identifying where the order originated, reviewing order information, applying channel-specific policies, selecting a remedy, responding to the customer, documenting the outcome, and later turning those interactions into usable reports.

The largest cost was not ticket volume alone - it was the manual work behind every ticket.

What the team was doing manually

- Read and categorize incoming customer requests.
- Determine whether the order came from Amazon, Walmart, Shopify, or another channel.
- Research orders, products, shipment details, and customer history.
- Apply different policies depending on channel and circumstance.
- Choose between refunds, replacements, discounts, escalations, or other remedies.
- Respond to the customer and document what happened.
- Track the financial cost of each resolution.
- Compile reports and manually search for recurring product, packaging, fulfillment, or carrier issues.

The reporting problem

Customer service data contained valuable operational insight, but extracting it was slow. Reviewing large volumes of interactions to identify recurring issues by product, sales channel, lot, carrier, or resolution required significant manual effort. The information existed, but it was not being captured in a structured, immediately usable form.

6-8 hrs DAILY MANUAL WORK	Multiple CHANNELS & POLICIES	Manual REPORTING & LOGGING
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The VendorVita Solution

VendorVita designed and built a custom CRM and customer service automation platform from scratch around the client's actual operating environment. The goal was not simply to answer customers faster. It was to automate routine service work, preserve human judgment where it matters, and turn every customer interaction into structured operational data.

Automated customer interactions

The platform can analyze incoming customer communications, determine what the customer needs, apply the correct rules, and complete approved actions automatically.

- Read and understand incoming customer emails and messages.
- Identify the reason for contact and the customer's sales channel.
- Retrieve and evaluate relevant order information.
- Recognize the product, shipment, and issue involved.
- Apply channel-specific customer service policies.
- Determine the appropriate resolution within defined approval limits.
- Generate and send customer responses.
- Process approved refunds, replacements, discounts, and other remedies.
- Escalate exceptions that require human judgment or management approval.

Automation does not eliminate human judgment. It determines where human judgment is actually necessary.

Why this matters

Instead of having a representative manually work through every step, routine cases are handled automatically while the team focuses on exceptions, nuanced situations, and higher-value customer interactions. This creates a service operation that can scale without increasing headcount at the same rate as order volume.

Automated Data Logging

Every customer interaction also becomes a structured data point. The system automatically records operational fields as the case is handled, eliminating the need for separate spreadsheets or after-the-fact reporting.

Automatically captured fields include:

- Contact reason
- Sales channel
- Order number
- Item description
- Carrier
- Lot number / best-by date
- Estimated total cost
- Resolution
- Additional comments

Contact reason	+ Add
Sales Channel	+ Add
Order #	+ Add
Item Description	+ Add
Carrier	+ Add
LOT Number/BBD	+ Add
Estimated Total Cost	+ Add
Resolution	+ Add
Additional Comments	+ Add

Example of automated case data fields

The operation creates its own dataset automatically as customers are being helped.

From customer service to operational intelligence

VendorVita also built an analysis page that management can review at any time. Instead of compiling reports manually, the company can see what is happening across customer service in real time and analyze trends by platform, product, lot, resolution, and financial impact.

Platform	Product	Lot	Resolution	Cost
Where issues originate	Which items create problems	Production-level patterns	How cases are solved	Financial impact

Automating Carrier Claims

A major extension of the platform addresses an often-overlooked source of lost margin: recovering money from carriers when customer shipments are damaged.

Customer service teams may issue refunds or replacements quickly, but the corresponding carrier claim is frequently a separate manual process. When claim values are relatively small, businesses often do not pursue them consistently because the administrative burden can approach the value of the claim itself.

A dedicated claims workflow

VendorVita built a Claims Management page directly into the platform. When a customer reports a qualifying shipping-related issue, information already captured during the interaction can be used to help prepare and submit claims to carriers such as UPS and USPS automatically.

1	2	3	4	5
Customer reports damage	Customer receives resolution	Issue is documented	Financial impact is calculated	Eligible carrier claim is initiated

Customer service and claims recovery are no longer separate administrative processes. They become part of the same automated system.

What this changes operationally

- Eligible claims are less likely to be forgotten or abandoned.
- Customer service data can flow directly into carrier recovery workflows.
- The business gains clearer visibility into the true cost of damage by carrier and product.
- Claims recovery becomes scalable instead of depending on repetitive manual follow-up.

The Results

6-8 hrs/day BEFORE	1-2 hrs/day AFTER	4-7 hrs/day MANUAL WORK ELIMINATED
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Beyond labor savings

- Faster customer response times.
- More consistent application of customer service policies.
- Automated handling of routine interactions.
- Less manual order research and documentation.
- Automated operational reporting and real-time analytics.
- Product- and lot-level issue tracking.
- Resolution-cost tracking and better visibility into margin leakage.
- Marketplace-specific trend analysis across Amazon, Walmart, Shopify, and DTC.
- Automated escalation of cases requiring human judgment.
- A structured, automated workflow for eligible carrier claims.
- A customer service operation capable of supporting continued growth without adding headcount at the same rate.

More than a CRM

Traditional customer service software is primarily designed to manage conversations. VendorVita approached the problem differently: every customer interaction should also help improve the business that created it.

Damaged shipment	→	Carrier-performance data
Leaking product	→	Product & lot data
Refund or replacement	→	Financial-impact & resolution data

The goal is not simply fewer customer service hours. The goal is a smarter operation.

The VendorVita Approach

VendorVita combines software development and AI automation with practical experience across e-commerce operations, customer service, fulfillment, packaging, shipping, carrier claims, marketplaces, and CPG operations. That allows us to look beyond the question, “How can we answer this customer automatically?” and instead ask, “Why did this customer need to contact the company in the first place, what did that problem cost, and what can we learn from it?”

THE OUTCOME

Customer service should not just resolve problems. It should help prevent them.

VendorVita helps growing brands automate customer service, capture operational data, identify the causes behind recurring issues, and build systems capable of scaling with the business.

Automate

ROUTINE CUSTOMER SERVICE

Capture

STRUCTURED OPERATIONAL DATA

Improve

THE UNDERLYING OPERATION

From customer interactions to carrier claims, the system is designed to reduce repetitive work while giving management better information to act on.

VENDORVITA CONSULTING

AI automation • Customer service systems • Operational intelligence