

Case study pack

Five AI and automation systems running in production inside distribution, procurement, homecare and direct to consumer operations.

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A full AI operating layer across customer service, tenders and back office

Office products and workplace supplies

Heatons ran twelve months of AI deployment across customer-facing and internal operations. The programme returned 8.27x on investment and reclaimed the equivalent of two full-time roles.

8.27x

Return on investment

1,957

Hours reclaimed in year one

2 FTE

Equivalent capacity released

95%

Accuracy on delivery tracking

The challenge

- Customer service was absorbing a constant stream of repetitive contact: delivery chasing, account queries, product identification and reorder questions, spread across phone, web chat and social channels.
- Supplier tenders and RFPs were assembled by hand, taking days of senior time per submission.
- Sales data existed but was not reaching the people who needed to act on it, and new starters relied on colleagues to answer process questions.

What we built

- An omni-channel customer agent deployed across voice, web, Instagram, Messenger and WhatsApp, handling live delivery tracking, product recommendations and account-level queries.
- An internal agent for staff onboarding and process queries, so the answer to a policy question is one message rather than one interruption.
- RFP and tender automation that drafts supplier submissions from the group's own catalogue and pricing data.
- Purchase invoice automation feeding the finance system directly, removing manual keying from the purchase ledger.
- Sales insight surfaced back to reps and managers, rather than sitting in a report nobody opens.

The outcome

- The customer agent now handles the volume that previously required two full-time customer service roles, and those people moved on to complex and consultative work rather than repeating themselves.
- Delivery tracking answers land in seconds instead of hours, at 95 per cent accuracy verified by the client's own IT team.
- Tender submissions that used to take days of assembly are drafted automatically, so the group bids on more opportunities without adding headcount.

Before → after

Query lands, queues, waits for a person, answered in hours → Query lands, answered in seconds, escalated only when it needs a human

Systems

Horizon ERP, Voice and social channels, Purchase invoice pipeline, Orbit CRM

National buying group (client name withheld)

NHS special product requests answered in eleven seconds instead of thirty minutes

Group purchasing, NHS and public sector supply

NHS trusts send in requests for products that sit outside the contracted catalogue. Those requests are now sourced, priced and quoted automatically, and the client bids on several times more of them.

11 sec	99.4%	2-3x	95%+
Per request, from 30+ minutes	Reduction in processing time	More requests bid on	Document automation success rate

The challenge

- Tail end requests are the awkward end of NHS supply: one-off items outside the contracted range, each needing a person to search suppliers, check availability, apply the right trust margin and build a quote.
- Each request took thirty minutes or more, which capped how many the team could realistically answer and meant a share of them were never bid on at all.
- Two regional teams were spending most of their working day on this processing rather than on customers.

What we built

- An automated sourcing engine that reads the incoming ticket, extracts every product line, and searches supplier and marketplace sources for a match.
- Trust-specific pricing rules applied automatically, including contract-first validation so contracted lines are always priced from contract before anything else is considered.
- Automatic generation of special product codes and a branded quote in the client's own format, returned to the ticket for review.
- A human review gate retained by design: every quote lands with a reviewer before it reaches the trust.
- Alongside this, supplier document automation, an RFP and tender tool, and a unified delivery tracking portal for customers.

The outcome

- Requests that took over half an hour of skilled searching are returned in eleven seconds, with the reviewer confirming rather than constructing.
- Because the cost of answering a request collapsed, the client now bids on requests it would previously have let go, which turns a cost centre into revenue.
- The processing load across two regional teams has been substantially removed, freeing that capacity for customer-facing work.

Before → after

Ticket in, manual search, manual pricing, manual quote, 30+ minutes → Ticket in, sourced and priced automatically, reviewer approves, 11 seconds

Systems

Service desk integration, ERP integration, Supplier and marketplace sourcing, Automated quote generation

Half the inbound website workload, answered before anyone opens an email

Office products and workplace supplies

A 24/7 agent on the Aston & James website handles sourcing, support and product questions at the moment customers ask them. Inbound requests reaching the sales and support team fell by half.

50%

Fewer requests reaching the team

587

Conversations handled per week

24/7

Coverage, including out of hours

~1.2 FTE

Capacity reassigned

The challenge

- Every question that arrived through the website became an email: shredding bookings, showroom appointments, ink cartridge identification, sourcing requests and support issues all landed in the same inbox.
- Customers browsing outside office hours waited until the next working day for an answer, and some did not wait.
- Enquiries were easy to lose in a shared mailbox, and the data inside them was never captured anywhere useful.

What we built

- A 24/7 AI agent on the website trained on the full product and services range, handling shredding requests, showroom bookings, cartridge identification, sourcing, product questions and sales meeting bookings.
- Structured capture of every sourcing and sales conversation, so requirements can be followed up with a relevant, personalised response rather than a generic one.
- Support issues the agent cannot resolve are captured as tickets rather than dropped, with the team notified the moment a customer asks for a person.
- A live dashboard giving the sales support team a real-time feed of every conversation happening on the site.

The outcome

- Around 587 conversations a week are now handled at the point of question, against roughly 1,600 unique visitors, so a substantial share of the site's traffic gets an immediate answer.
- Half of the inbound requests that used to arrive as website form emails no longer reach the team at all, and the ones that do are the ones that genuinely need a person.
- Sourcing and sales intent is captured as structured data rather than free text buried in a mailbox, which makes follow-up specific instead of generic.

Before → after

Question, web form, shared inbox, next working day → Question, answered on the spot, handed off only when it needs a person

Systems

Website agent, Live conversation dashboard, Orbit CRM, Horizon ERP

Care enquiries and carer applications, captured and routed around the clock

Homecare franchise network

A national homecare network replaced a rigid scripted chatbot with an AI agent that holds a real conversation with families in distress. Every enquiry is captured, classified and routed to the right team automatically.

24/7

Enquiry capture

100%

Conversations classified and routed

3x daily

Automated briefs to the office

80+

Offices in the network

The challenge

- Families reaching out about care for a relative were meeting a scripted bot and an outsourced answering service that could not answer basic questions about care types, coverage or how the service works.
- Enquiries and carer job applications arrived through the same channel and had to be separated by hand.
- Conversations happen when families are ready to have them, which is very often outside office hours.

What we built

- A conversational agent trained on the network's own service information, care types and coverage, able to hold a genuine multi-turn conversation rather than run a script.
- Automatic classification of every conversation into care enquiry, recruitment application or general query, with contact details and requirements extracted.
- Per-conversation summary emails delivered to the right office several times a day, so the team sees a clean brief rather than a raw transcript.
- A pipeline that runs on a schedule with no manual step, capturing every conversation the agent handles whether or not anyone is at a desk.

The outcome

- In one recent five-week sample the agent captured and routed twelve care enquiries and ten carer applications without a person touching the triage step.
- Families get an immediate, sensible answer about care types and coverage at the moment they ask, instead of a postcode check and a redirect.
- Recruitment applications no longer sit mixed in with care enquiries, so both reach the right team on the same day.

Before → after

Scripted bot, postcode check, redirect, enquiry lost → Real conversation, classified, briefed to the right office the same day

Systems

Voiceflow, Automated classification, Scheduled pipelines, Outlook

Every customer conversation turned into a weekly commercial brief

Direct to consumer health and supplements

IHS runs an AI product adviser on its store and gets a Friday digest that reads like a research report. The team sees what customers asked for, what the site failed to answer, and every conversation behind it.

1 email

Replaces a week of transcript review

100%

Conversations classified daily

Weekly

Product demand and gap analysis

The challenge

- The store's AI adviser was handling a steady stream of product, dosage and delivery questions, but nobody had time to read the transcripts.
- The most valuable signal in those conversations, what people wanted that the range does not carry and where the website confused them, was invisible.
- A daily report would have been ignored. The team needed something they would actually read.

What we built

- Daily automated classification of every conversation into solved and unsolved, using a taxonomy the client defined themselves rather than a generic one.
- A Friday digest covering the week: volume and the solved to unsolved ratio, the products customers asked about most, category breakdown, and website friction signals where the site itself caused the confusion.
- Full conversation transcripts rendered into the digest, because the detail is where the decisions come from.

The outcome

- The team reads one email on a Friday and knows what customers wanted, what the adviser could not answer, and which pages sent people to chat in the first place.
- Product demand the range does not currently meet shows up as a pattern rather than as anecdote, which makes it usable for buying decisions.

Before → after

Hundreds of transcripts nobody reads → One Friday brief with the demand signal, the gaps and the evidence

Systems

Conversational platform, Automated classification, Scheduled pipelines