



Save Time. Save Money.

Air Rey Services Secures Client Data and Saves \$96K (USD) Annually

By replacing error-prone manual credit checks with Intelligent Automation, Valenta helped streamline operations and strengthen compliance



INDUSTRY:
HVAC & Contracting



LOCATION:
United States & Mexico



SOLUTION:
AI-Powered
Intelligent Automation

CHALLENGE

Air Rey Services faced growing inefficiencies in their credit approval process. Manual tasks slowed down approvals, created errors, and raised security risks.

- Credit analysts manually submitted applications across 15+ finance portals
- All sensitive client data was shared via WhatsApp groups, exposing Personally Identifiable Information (PII) and causing delays
- High rate of errors from handwritten forms and manual transcription
- Analysts spent most of their time entering data instead of evaluating the right financing options

BUSINESS PAIN POINTS

- Delays in providing clients with financing options
- Increased labor costs from extended work hours
- Risk of compliance and data privacy breaches with 14+ employees handling PII via WhatsApp
- High error rates from manual entry and difficult-to-read forms



WHO WE HELPED

Air Rey Services is a full-service contractor providing quality heating and air conditioning installation and repair for residential, commercial, and builder clients.



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SOLUTION

Through AI-Powered Intelligent Automation, Valenta implemented a custom-built Digital Assistant to automate the end-to-end credit approval process, significantly reducing manual intervention.



Credit Score Check

The Digital Assistant automatically gathers client information, performs credit checks through Experian and TransUnion, and updates the CRM with relevant results. It also flags the finance portals that best match the client's profile, so analysts can quickly identify the right options.



Credit Request

Once a finance portal is selected, the Digital Assistant prepares and submits the full credit request, then returns the approval status, terms, and interest rate directly into the CRM.

By taking over these repetitive tasks, the Digital Assistant allows Air Rey Services' Credit Analysts to focus their time on evaluating financing strategies and providing a better client experience.

BUSINESS IMPACT

Within just weeks of going live, the Digital Assistant already began showing measurable impact:

- Increased operational capacity to handle 40+ transactions per day with faster turn around
- Improved turn around times of credit processing increased revenue for the client
- Eliminated manual transcription errors from handwritten forms
- Improved data security by migrating all Personally Identifiable Information (PII) from WhatsApp into a secure CRM

RETURN ON INVESTMENT: 12X



\$96,400 Saved Annually

On average \$385 saved daily



Digital Assistant Replaced the Workload of 3 Full-Time Employees

22.7 hours saved each day—equating to 709 workdays annually



Credit Processing Completed 87.5% Faster

Reduced processing time from 40 minutes to 5 minutes manually



Payback Period

3 weeks after implementation, validation and go-live assurance phase