AI WORKFLOW ASSESSMENT · DECISION BRIEF

Bayside Home Services: customer replies

Sponsor and Decider: Ray, owner · Workflow owner: Monica, customer service manager

THE WORKFLOW

Five dispatchers answer about 200 service requests a week. Each reply needs the customer's service history, technician availability and the right policy wording.

STARTING HYPOTHESIS · RECORDED, NOT CONCLUDED

Ray's first idea was AI for **applicant screening**. On the Pilot Selection Scorecard it scored 8 of 15 and was excluded from a first pilot. **Reply drafting** scored 15 and was investigated. Overdue invoices scored 12 and was parked for later.

WHAT THE WORK SHOWED

Kind	Finding
EVIDENCE	Observed: about 8 minutes locating history, availability and policy, and about 2 minutes writing. About 10 minutes in total.
EVIDENCE	Denise, dispatcher: "Writing a reply takes a few minutes. It's not the problem."
INTERPRETATION	Hunting for information dominates the work, not writing.
REQUIREMENT	Visible, source-backed information alongside a draft.
TO VALIDATE	Observe dispatchers verifying sources, and measure the whole job, not only drafting.

RANKED PAIN POINTS

1. **Finding the facts.** History, schedule and policy sit in different places (about 8 of 10 minutes).
2. **Policy wording.** Replies need the right warranty and policy language every time.
3. **Urgent requests.** Gas, smoke, flooding and similar requests must reach a person, never a routine reply.

TRUST BASELINE

Four dimensions: Competence, Transparency, Control and Security.

Transparency: 2.3 of 5. Below 3, so it becomes a design requirement. Job impact and customer and data risk are Security follow-ups.

NOT YET MEASURED

NOT YET MEASURED Formal handling-time baseline. Owner: Monica. Collection date set before rehearsal.

LIMITS FOR ANY TRIAL

- AI drafts; a dispatcher reviews and sends every message.
- No AI promises of price, appointment time or warranty coverage.
- Pause if an urgent request is not escalated.

GREENLIGHT CALL (PROCEED, REVISE, PARK)

● **PROCEED** ○ REVISE ○ PARK

Proceed: rehearse reply drafting. Rehearse, not deploy. Use representative cases, including traps such as a warranty question and a possible gas leak, and keep final cases sealed.

Evidence needed for an On Air call (go, adjust, no-go): no unsafe outputs, no prohibited promises, most drafts needing minor edits or less, urgent requests reaching a person, every trust dimension at 3 or above, and handling below the 10-minute baseline.

The selection stays provisional. Ray decides; Monica owns follow-through.

ANNOTATED WORKFLOW MAP

How a customer reply gets made today

Mapped from observation and a recent-case walkthrough with a dispatcher. Times are observed estimates, not a formal baseline.

STEP 1
Request arrives
Phone, email or web form

STEP 2 PAIN
Find service history
Separate system; past visits and equipment

STEP 3 PAIN
Check availability
Technician schedule

STEP 4 PAIN
Find the policy
Warranty and pricing language

STEP 5
Write the reply
Dispatcher drafts

STEP 6
Send
Dispatcher reviews and sends

ABOUT 8 MINUTES HUNTING FOR INFORMATION

ABOUT 2 MIN

JUDGMENT CALLS IN THE WORKFLOW

- Is this request urgent? Gas, burning smell, smoke, flooding, sparks, or no heat in freezing weather go straight to a person.
- Does the customer's equipment fall under warranty?
- Can an appointment be offered today, or only a callback?

WHERE ERRORS ARE CAUGHT TODAY

- Dispatchers check history and schedule by hand before replying.
- Policy wording depends on memory, so it varies between dispatchers.
- Customers follow up asking for an update about 25 times a week.

WHAT AI COULD CHANGE

Show the history entry, schedule and policy section beside a draft, so the dispatcher verifies sources instead of hunting for them. The draft is the smaller gain; the visible sources are the larger one.

WHAT AI MUST NOT CHANGE

A dispatcher reviews and sends every message. Urgent requests never get a routine reply. Tricky cases stay with people until a rehearsal shows otherwise.

HOW TO READ THIS BRIEF

`EVIDENCE` was observed or said directly. `INTERPRETATION` is what it likely means until checked with the people who do the work. `NOT YET MEASURED` names an owner and a date, never a guess.

Bayside Home Services is fictional. All people, timings and scores are illustrative teaching material from the TURNS course, not client results or promised AI performance.