



Escalation Analysis Report for Client X

Understanding AI Handoff Trends and System Integration Issues

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Summary of Escalation Issue into the CRM

Client X, which manages 3,000 rental units across 12 buildings, uses an artificial intelligence (AI) tool, integrated with their customer relationship management system (CRM) like Salesforce, to handle leasing inquiries. This AI assists in answering questions from potential tenants. However, when the AI cannot answer a question by itself, it sends these queries, known as "handoffs," to the human agents to resolve.

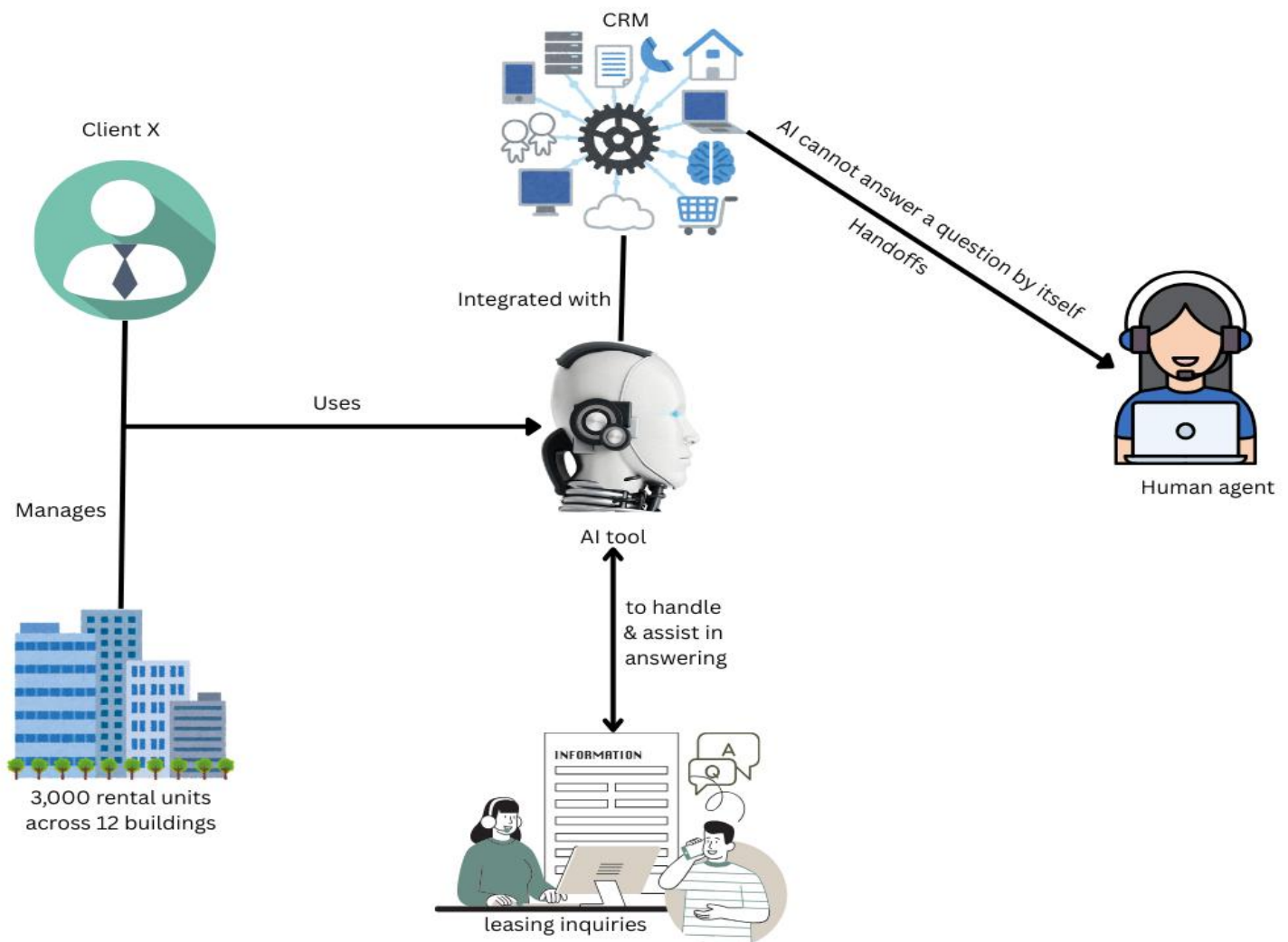


Fig 1. Previous Workflow

Recently, the method by which these handoffs are delivered to their CRM has changed, and training was provided for Client X’s staff to adapt to this new process. Despite this, there has been a significant increase in the volume of handoffs. Previously, about 9% of all inquiries were escalated to human agents, but this rate has almost doubled to 19% since the change.

This increase in handoffs has overwhelmed Client X's team, filling their work queues and causing some inquiries to be delayed or unanswered. Additionally, a new marketing source, "RentsRUs.com," was added, and inquiries from this source need to be directed to the AI’s email to be handled properly; otherwise, they end up as new tasks for the agents.

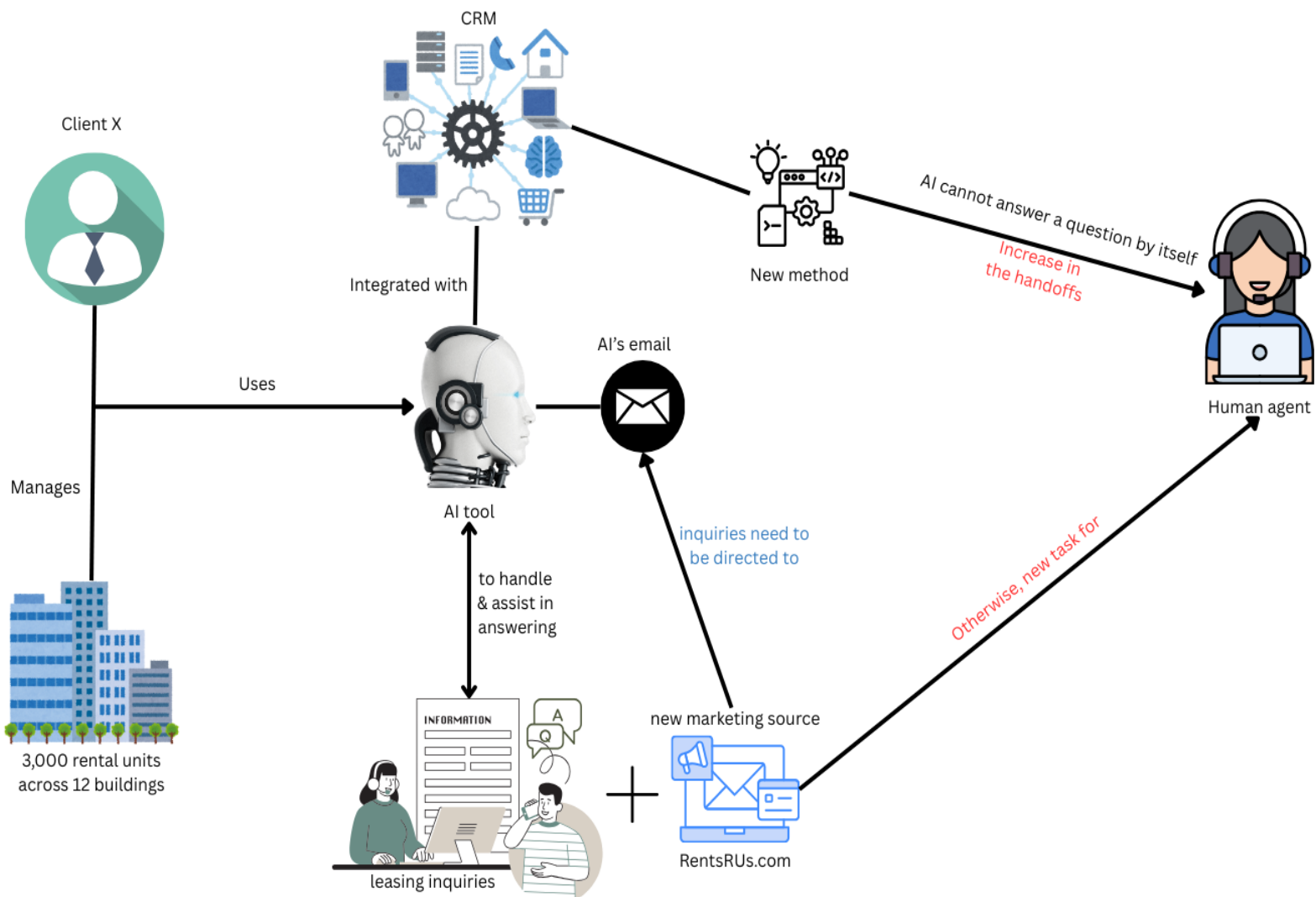


Fig 2. Current Workflow

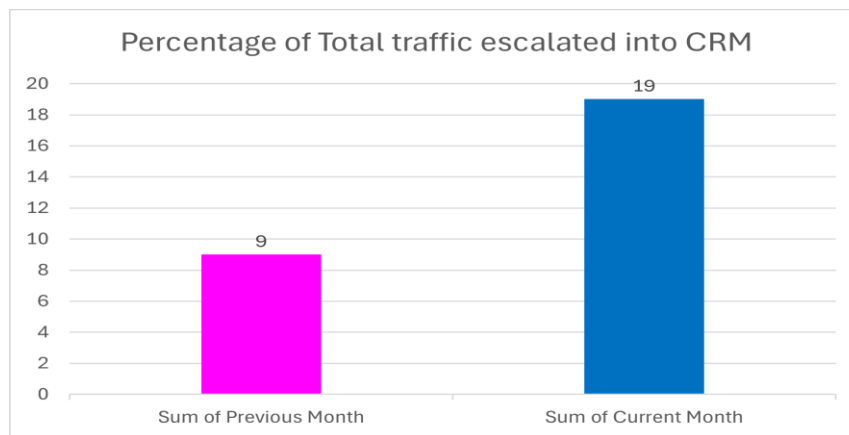
Previous and current month's escalation comparison:

Fig 3. Comparison of Previous and current Month's Total Traffic

These stories collectively paint a picture of our recent escalation spike - from a mere 9% to a striking 19%. This surge stems from our refined but overly cautious AI handoffs, an integration with RentsRUs.com that missed a beat, and the intricate nature of queries that still challenge our AI.

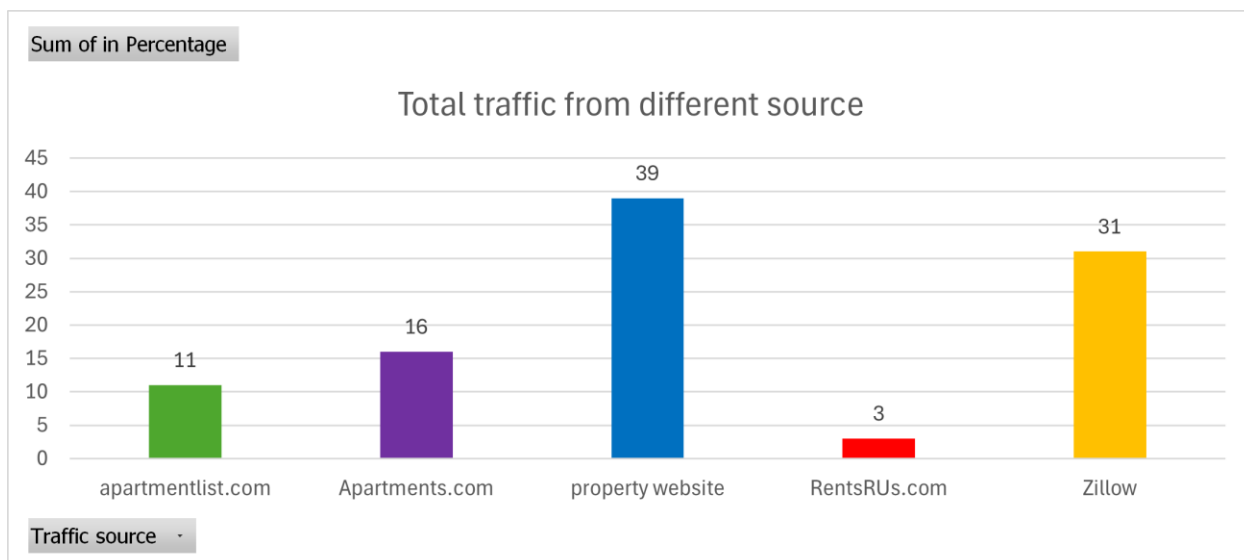


Fig 4. Total traffic from different Source

The distribution of total traffic from different sources to Client X's CRM.



Guest Card Summary:

Guest Card 1 – Joshua is a current resident who reached out about a broken sink - a pretty routine issue, but it turned into a frustrating experience. Our AI assistant was supposed to catch and escalate this kind of maintenance request, but somehow it slipped through the cracks. As a result, Joshua's message went unanswered until it finally landed in the CRM queue, where the team had to jump in and handle it directly.

Guest Card 2 – Mitchell came to us through the newly added RentsRUs.com, curious about whether there was any wiggle room on rent pricing. It was a reasonable question, but one that our AI couldn't quite handle with the right nuance. Instead of a thoughtful response, the conversation was quickly escalated to the CRM team, missing an opportunity for a more personalized engagement.

Guest Card 3 – Dana was interested in an apartment and wanted to know about the history of the kitchen appliances — specifically, if the fridge had any past issues. It was a detailed question that required access to maintenance records, something our AI isn't equipped to retrieve. So once again, the conversation had to be handed off to a human agent to get the right information.



Potential Causes for Increased Escalations:

- 1. A More Cautious AI Handoff Protocol:** After a recent change in how it decides what to handle vs. what to escalate, it's started playing it extra safe - sending almost every slightly complex question straight to the human team. While the intention was to ensure nothing important falls through the cracks, this "better safe than sorry" mindset is now creating more handoffs than necessary, overwhelming our support staff with questions the AI used to manage just fine.

- 2. Challenges with Integrating RentsRUs.com:** The integration isn't quite seamless yet, and that's causing problems. Instead of routing inquiries directly to our AI like it should, many of these messages are slipping past and landing on our human team's to-do list. It's added some unexpected chaos to the workflow and made things busier than they need to be.

- 3. The Complexity of Real-Life Questions:** Behind every message is a real person with real concerns, something our AI sometimes struggles to fully understand. Take Joshua, dealing with a broken sink that never got fixed, or Dana, who just wants to know if her potential new fridge has a clean history. These aren't just questions-they're personal stories, experiences, and expectations. And while our AI is smart, it still can't match the empathy, insight, and reassurance that a human can provide in these moments. That human connection is often what makes all the difference.