UNIVERSITY OF TORONTO
FACULTY OF APPLIED SCIENCE & ENGINEERING
Centre for Analytics and Artificial Intelligence Engineering

M-Lab CARTE AI Workshop – 90 Day Pilot Canvas

Fri Oct 17 2025

1. Problems & Stakeholders

What business problem are we solving, and who owns it?

2. Success & Baseline

How will we measure success?

Primary KPI	Baseline Value
Target by Day 90	Measurement Plan

3. Technical Approach

What methods, data, and tools will you use?

Methods
Data Sources & Access Requirements
Tools & Platforms

4. 90-Day Timeline

Phase 1 (Weeks 1-3)	Phase 2 (Weeks 4-8)	Phase 3 (Weeks 9-12)

5. Resources

People	Budget

6. Risks & Gates

e.g. top 3 risks, kill criteria, privacy / compliance, key assumptions

7. Outcome Artifact

What demo / report exists at Day 90? Who signs off on success?

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1. Problems & Stakeholders

What business problem are we solving, and who owns it?

- Too many support emails, many asking the same questions
- People wait too long for answers
- Support staff are overloaded

- Problem owner: Support Operations Manager (owns SLAs and workflow)
- Executive sponsor: VP, Customer Experience
- Contributors: Support leads, knowledge base owner, IT platform admin

2. Success & Baseline

How will we measure success?

Primary KPI	Baseline Value
Average first-response time to support emails	12 hours (current average)
Target by Day 90	**Measurement Plan**
Reduce by 30% and automatically answer at least 25% of emails	Create automated weekly report Publish simple dashboard with trends

3. Technical Approach

What methods, data, and tools will you use?

Methods

Retrieval-augmented generation to ground answers in approved content
FAQ intent routing with a small set of intents to start
Citation enforcement and rejection handling
Small evaluation set for answer quality and citation coverage

Data Sources & Access Requirements

Email/ticket export with subject, body, timestamps and tags
Knowledge bases with product manuals and help docs
Redaction rules to mask personally identifiable information
Content storage must meet privacy requirements

Tools & Platforms

Flowise for building RAG graph and intent router
Vector store for knowledge base data
LLM endpoint approved by IT (e.g. OpenAI with enterprise controls)
Simple dashboard using Google Cloud Console

4. 90-Day Timeline

Phase 1 (Weeks 1-3)	Phase 2 (Weeks 4-8)	Phase 3 (Weeks 9-12)
Decide question types to handle Collect sample questions and help documents Confirm access + redaction rules	Build assistant in Flowise with retrieval + intent routing Index docs + configure test inbox Test quality of answers and tune	Run assistant on limited slice of support queue Track KPIs Capture issues + update docs as needed Produce report

5. Resources

People	Budget
Project manager (scope, timeline, reviews) Business analyst (intents, evaluation set, KPIs) Data expert (indexing, redaction, quality) IT admin + support lead	LLM and vector store usage: small pilot tier or credits for 3 months Tools: Flowise hosting or equivalent minimal infra costs Staff time: internal allocation for the roles above; no external vendors assumed Contingency: 10–15%

6. Risks & Gates

e.g. top 3 risks, kill criteria, privacy / compliance, key assumptions

1) out of date or incomplete help docs reduce answer quality
2) hallucinated answers or missing citations erode trust
3) low auto-answer coverage due to misconfigured setup

kill criteria: by week 8, citation coverage < 90% on evaluation set
by week 12, auto-answer rate < 10% and no clear path to improve

privacy: ensure personal data masked and no customer information in vector index

7. Outcome Artifact

What demo / report exists at Day 90? Who signs off on success?

Live walkthrough of assistant answering a set of real FAQ emails with sources
Before vs. after view of first-response time on a sample of tickets
Admin view showing intent routing, citation checks, and fallback handling
Report including KPIs, auto-answer coverage, citation coverage + top issues.
Appendix with evaluation set results and sample annotated answers
Problem owner: Support Operations Manager confirms KPI targets and operational readiness
Executive sponsor: VP, Customer Experience approves go-forward plan and resourcing