# PILOT SCOPING EXERCISE

## Case Study & Exercise Materials

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## **Contents**

1.1	Case Study: RetailFlow Customer Service Challenge
1.2	BACKGROUND
1.3	CURRENT STATE: THE PROBLEM
1.4	THE CHALLENGE FROM LEADERSHIP
1.5	YOUR TASK: SCOPE THE PILOT
PIL	OT SCOPING WORKSHEET
2.1	SECTION 1: PILOT SCOPE DECISIONS
2.2	SECTION 2: SUCCESS METRICS
2.3	SECTION 3: PILOT BOUNDARIES
2.4	SECTION 4: RISK MITIGATION
2.5	SECTION 5: RESOURCE ALLOCATION
2.6	SECTION 6: GO / NO-GO DECISION CRITERIA
2.7	SECTION 7: STAKEHOLDER MANAGEMENT
2.8	REFLECTION QUESTIONS
	1.3 1.4 1.5 PIL 2.1 2.2 2.3 2.4 2.5 2.6 2.7

# 1.2 BACKGROUND

**RetailFlow** is a regional retail chain with 50 physical stores across Australia plus a growing e-commerce platform. Customer satisfaction scores have dropped significantly from 78% to 68% over the past year. The primary complaint? Painfully slow customer service response times.

Leadership has approved an AI pilot to address this problem, and you're leading it.

1.1 Case Study: RetailFlow Customer Service Challenge

## 1.3 CURRENT STATE: THE PROBLEM



#### 1.3.1 Customer Service Metrics

Metric	Current Performance	Industry Benchmark
Average email response time	26 hours	12 hours
Average phone wait time	12 minutes	4 minutes
Customer satisfaction score	68%	78%
First-contact resolution rate	61%	75%

## 1.3.2 Team & Operations

- Customer service team: 25 people across 3 shifts (8am-10pm, 7 days/week)
- Weekly ticket volume: Approximately 2,500 customer inquiries
- Cost per ticket resolved: \$18 (including labor, systems, overhead)
- Annual customer service cost: ~\$2.3M

## 1.3.3 Common Customer Query Types

Query Type	% of Volume	Current Avg Handle Time
Order status/tracking	35%	4 minutes
Returns/refunds policy	25%	8 minutes
Product questions	20%	6 minutes
Technical issues (website/app)	15%	12 minutes
Complaints/escalations	5%	20+ minutes

#### 1.3.4 Current Process

- 1. All queries arrive in shared inbox (email, chat, phone notes)
- 2. Team members manually triage based on subject line
- 3. Agents search knowledge base (often outdated) while responding
- 4. Complex issues escalated to team leads (unclear process)
- 5. No automated responses or routing
- 6. No quality consistency across agents

#### 1.3.5 Pain Points Identified

#### From customers:

- "I asked a simple question and waited 2 days for an answer"
- "Got different answers from different agents"
- "Had to explain my issue three times"

#### From customer service team:

•	"We	answer	the same	questions	50	times	a day"	
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• "Finding information takes longer than actually helping"



• "We're drowning in simple queries and can't focus on complex problems"

#### 1.4 THE CHALLENGE FROM LEADERSHIP

Your Executive Sponsor (CEO) has said:

"AI is the solution. Everyone's doing it. I want this fixed by Q4. Get it done."

You've been allocated:

- Budget: \$150K for the pilot phase
- Timeline: 6 months to pilot, then decide to scale or kill
- **Team:** You (project lead), 1 data analyst, access to IT support as needed, customer service manager as advisor
- Constraint: Must not disrupt ongoing operations

#### 1.5 YOUR TASK: SCOPE THE PILOT

Design a pilot that's "Goldilocks perfect" - not too ambitious (guaranteed failure), not too timid (learn nothing), but just right (prove value within constraints).

You have **30 minutes** to work with your group.

## 2 PILOT SCOPING WORKSHEET

#### 2.1 SECTION 1: PILOT SCOPE DECISIONS

## 2.1.1 What will the AI pilot actually DO?

Check all that apply and specify details:

Automate responses to ALL query types
(High risk - probably too ambitious)
Automate responses to SPECIFIC query types only
Which ones?
Why these?

☐ Assist human agents with AI-suggested responses (AI drafts, human reviews and sends) For which query types?	<b>E</b> Curtin University
☐ Automatically triage and route queries (AI categorizes and assigns to right agent/team)	
☐ Build/update intelligent knowledge base (AI helps agents find answers faster)	
$\square$ Other approach:	
2.1.2 Your chosen approach: Primary function of the AI pilot:	
Rationale for this scope:	

## 2.2 SECTION 2: SUCCESS METRICS

Choose 3-5 metrics that will prove this pilot succeeded.

Be specific and measurable.

Metric	Current Baseline	Pilot Target	How You'll Measure It
Example: Avg response time for order tracking 1. 2. 3.	26 hours	4 hours	Ticketing system timestamps

**Primary success criterion** (the ONE metric that matters most):

## 2.3 SECTION 3: PILOT BOUNDARIES



Be explicit about what's IN and OUT of scope.

# 2.3.1 What's IN SCOPE for this pilot:

Query types covered:	
Volume of queries: How many queries per day/week will go through the AI?	
Time period: How long will the pilot run?	
Team members involved: Who's participating?	
Customer segments: All customers, or specific segment?	
Other:	
2.3.2 What's explicitly OUT OF SCOPE:  1	

## $\operatorname{Risk}$

## 2.4 SECTION 4: RISK MITIGATION

Identify risks and how you'll manage them.

Risk	Likelihood $(H/M/L)$	Impact $(H/M/L)$	Mitigation Strategy
AI gives incorrect information to customers			
Customer service team resists using it			
Customers hate interacting with AI			
Budget overrun			
AI can't handle query complexity			
Data privacy/security issues			

Risk #1:

Mitigation:

Risk #2:

Mitigation:

Risk #3:

Mitigation:

## 2.5 SECTION 5: RESOURCE ALLOCATION

## 2.5.1 Budget Breakdown (\$150K total)

Category	Allocation	Rationale
AI platform/software (licenses, subscriptions)	\$	
Implementation services (consulting, integration)	\$	
Training (team training, change management)	\$	
Data preparation (cleaning, labeling)	\$	
Testing & QA	\$	
Contingency reserve	\$	
TOTAL	\$150,000	

## 2.5.2 Timeline & Milestones



Month	Key Activities	Success Criteria	Deliverables
Month 1			
Month 2			
Month 3			
Month 4			
Month 5			
Month 6			

## 2.6 SECTION 6: GO / NO-GO DECISION CRITERIA

After 3 months (mid-pilot), what evidence would lead you to:

## 2.6.1 SCALE IT (recommend full rollout)

:	
	ı.

1		
2		
3		

## 2.6.2 PIVOT IT (change approach but continue)

Criteria:

1.	
2.	
3.	

## 2.6.3 KILL IT (stop the project)

Criteria:

1		 	 
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3			

## 2.7 SECTION 7: STAKEHOLDER MANAGEMENT



How will you keep key stakeholders engaged and supportive?

Stakeholder	Their Main Concern	Your Engagement Strategy	Communication Frequency
CEO			
(Executive			
Sponsor)			
CFO			
Customer			
Service			
Manager			
Customer			
Service Team			
IT/Security			
Customers			

## 2.8 REFLECTION QUESTIONS

- 2.8.1 What makes your pilot scope "just right"?
- 2.8.2 What's your biggest uncertainty about this plan?
- 2.8.3 If you had unlimited budget and time, what would you do differently?
- 2.8.4 What's the one thing that could make this pilot fail despite good planning?