ATAG | Ben | Project intake

1. Introduction

Ben is your AI-powered digital assistant, purpose-built to transform ATAG's customer service. Seamlessly embedded in Salesforce, Ben takes on the repetitive work of managing routine emails—instantly drafting accurate replies, moving cases to the right queues, and escalating only when human expertise is truly needed. By automating up to 40% of email traffic, Ben not only reduces manual workload and relieves pressure on support teams but also ensures customers get faster, more consistent answers. With its smart integration and scalable design, Ben turns customer service from a bottleneck into a growth enabler—freeing your people to focus on what matters most: solving complex cases and delivering exceptional experiences.

1.1 Purpose of this document

This playbook lays out everything you need to seamlessly integrate your AI-powered digital employee—covering workflows, tech specs, integration roadmaps, and access requirements. It's the result of deep-dive collaboration during Design Week, designed to align perfectly with your processes, goals, and system needs.

1.2 Project goal

Helping ATAG scale smarter by using AI in Salesforce to instantly handle routine emails, cut pressure on the support team, and give customers a faster, smoother service experience that fuels future growth.

Our success in achieving this ambitious goal will be driven by the key metrics outlined below, serving as our north star for measurable impact.

Key performance indicator	Measurement	Goal
Emails answered	Number of emails answered by Ben	TBD
Automation rate	% of incoming emails that are answered automatically	Phase 1 = 20%

Key performance indicator	Measurement	Goal
	by Ben In the first phase, this means a draft that is send by a human agent without changing the content	Phase 2 = 40%
Time to closure	Average time before a case is closed	TBD

1.3 Business case

ATAG receives 5000+ emails per month. 35% is answered by an external team Surinam and a big part is answered with a standard template. The response time is multiple days.

ATAG has on average 5.1 FTE working on email cases.

If Ben automates 20-40% of the emails this would mean a saving of 1-2 FTE.

2. Process

2.1 Context

ATAG's customer service team currently deals with a high and constant stream of emails and web forms —more than 8,000 every month. These emails are created as cases in Salesforce and then picked up manually by agents from brand-specific queues. Once an agent selects a case, they must first check whether it has landed in the correct queue. If not, they move it to another queue, which adds delays and administrative overhead.

When an agent begins working on a case, they assess whether they can solve it themselves or if input from another department is needed. In many instances, questions about parts, repairs, or warranties require coordination with colleagues or escalation to a mechanic. This leads to multiple handovers and longer resolution times. Agents also rely heavily on Salesforce templates, but they need to manually select, adjust, and send responses—often reworking existing text to fit the specific case.

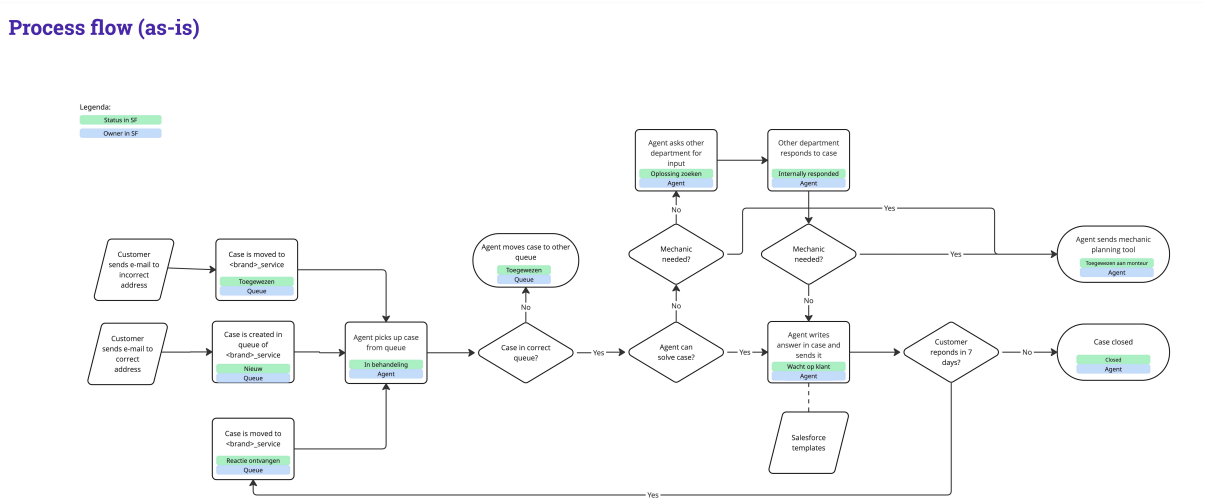
The process does not end with sending a reply. After responding, the agent must monitor whether the customer comes back within seven days. If no reply is

received, the case is closed manually. If the customer does respond, the cycle restarts with the agent reviewing and replying again.

In practice, many of these emails involve routine questions or template-driven answers, yet they consume significant amounts of agent time. The reliance on manual handling—queue management, drafting responses, escalating cases—creates pressure on the support teams both in the Netherlands and Surinam. At the same time, customers often wait days before receiving even a simple answer, which impacts the overall service experience.

This is the “as is” situation: a people-heavy process that blends valuable problem-solving with repetitive, administrative work, resulting in slow turnaround times and limited scalability.

2.2 Process map - *As is*



	Step	Description	Status	Owner
1	Customer sends e-mail to incorrect address	A customer email is received at the wrong service address and must be redirected.		
2	Customer sends e-mail to correct address	A customer email arrives at the correct service address and is		

	Step	Description	Status	Owner
		processed by Salesforce.		
3	Case is created in <brand>_service	Salesforce generates a new case and places it in the corresponding service queue.	Nieuw	Queue
4	Case is moved to <brand>_service	The case is routed into the brand-specific service queue for handling.	Toegewezen	Queue
5	Agent picks up case from queue	A support agent manually selects the case from the queue to begin working on it.	In behandeling	Agent
6	Case in correct queue?	The agent checks if the case is assigned to the correct queue; if not, it must be moved.		
7	Agent moves case to other queue	The agent reassigns the case to another queue if it was placed incorrectly.	Toegewezen	Queue
8	Agent can solve case?	The agent determines whether the issue can be solved directly without further input.		
9	Mechanic needed?	The agent decides if the case requires		

	Step	Description	Status	Owner
		scheduling a mechanic visit.		
10	Agent asks other department for input	If needed, the agent requests help from another department to resolve the case.	Oplossing zoeken	Agent
11	Other department responds to case	The other department provides feedback or a solution for the agent to proceed.	Internally responded	Agent
12	Agent sends mechanic planning tool	The agent uses the planning system to assign the case to a mechanic.	Toegewezen aan monteur	Agent
13	Agent writes answer in case and sends it	If the case can be resolved, the agent drafts and sends a reply, often using templates.	Wacht op klant	Agent
14	Customer responds in 7 days?	The system monitors whether the customer replies within seven days.		
15	Case is moved to <brand>_service	If the customer replies within 7 days to the answer, the case is moved to the queue to be picked up again	Reactie ontvangen	Queue
16	Case closed	If no reply is received within 7 days, the case is	Closed	Agent

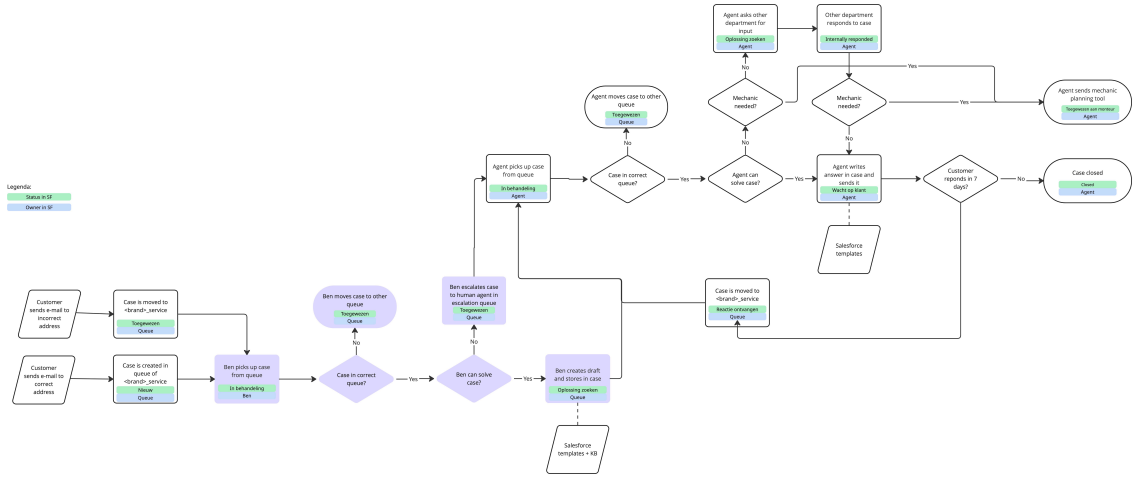
	Step	Description	Status	Owner
		closed in Salesforce because we assume the issue is resolved		

2.3 Process map - *To be*

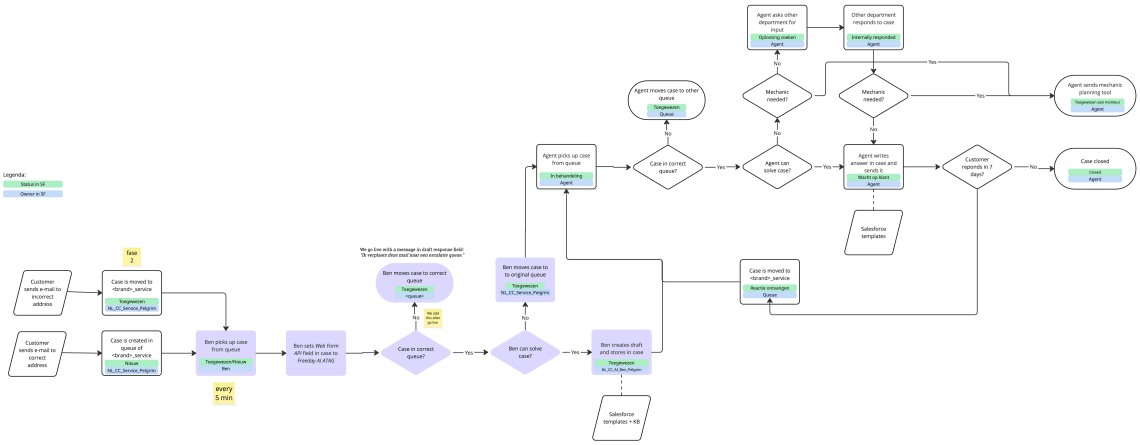
The process steps automated by Ben are reflected in purple in the process flow below.

The purple steps are described in more detail in the table below. All other steps are the same as the As Is situation in 2.2.

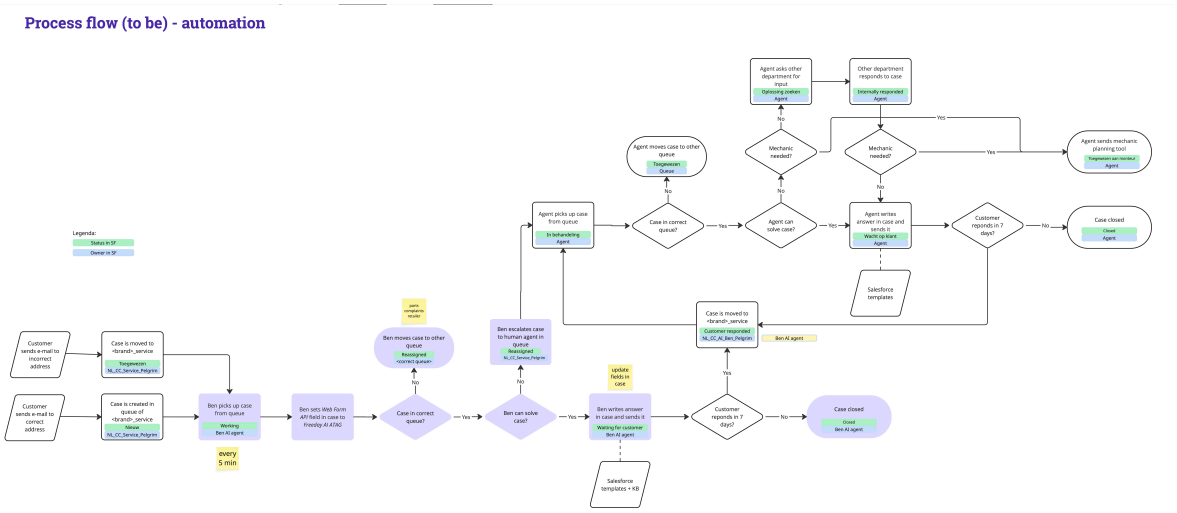
Process flow (to be) - drafts



Process flow (to be) - drafts V2 with queue



Process flow (to be) - automation



	Step	Description	Status	Owner
1	Ben picks up case from queue	Ben automatically takes a case from the service queue to begin handling it.	In behandeling	Ben
2	Ben moves case to other queue	If the case is not in the right place, Ben reassigns it to the correct queue.	Toegewezen	Queue
3	Ben can solve case?	Ben checks if the case can be solved using available templates and knowledge base.		
4	Ben escalates case to human agent in escalation queue	If the issue is too complex, Ben escalates the case to a human agent’s queue.	Toegewezen	Queue
5	Ben writes answer in case and sends it	If the case can be solved, Ben drafts and sends the reply using Salesforce templates and the knowledge base.	Wacht op klant	Ben

	Step	Description	Status	Owner
6	Case closed	If the customer does not reply within 7 days and no further response is needed, Ben closes the case.	Closed	Ben

2.4 Feature overview

Below is a table of features that outlines what we are building for discussion purposes.

🚨 **Must have:** essential for a successful go live; the core of our solution's value.

Feature	Description	Dependencies / Prerequisites
1. Get emails	Ben will retrieve tickets assigned to the NL CC Service Pelgrim queue.	Salesforce API (credentials & permissions) to pick up cases
2. Ben in SF	Ben is a user in Salesforce and all actions performed by Ben are visible / traceable	Salesforce user account
3. Case assessment	Ben assesses a case and decides whether it can solve it. If not, it will put the case in the correct queue to be picked up by a human agent.	Correct classification of user request
4. Draft response	Ben will create draft responses on email and web cases in the Pelgrim queue	* Knowledge base for Pelgrim products * Salesforce API permissions to store draft response in case
5. Case closing	Ben closes a case if a customer replies that the issue has been solved by Ben's answer	Correct classification of user request

🌟 **Should have:** high-priority enhancements that can follow the go-live but do not block it.

Feature	Description	Dependencies / Prerequisites
6. Answer case	Ben automatically answers email and web cases in the Pelgrim queue	Salesforce API to send email to user
7. Move case to other queue	Ben decides whether a case is in the right queue. If not, Ben will move the case to the correct queue.	Descriptions and queue names of other possible queues

Next steps: future-focused work to scale and optimize the product.

Feature	Description	Dependencies / Prerequisites
8. Schedule mechanic	Ben decides if a mechanic is needed and directly starts the mechanic process. If needed, Ben will ask the customer for needed information.	T.b.d.

2.5 Applications and upcoming changes

Name and version	Scope	Periodicity	Responsible party
Salesforce	Pick up case	Every 5 minutes	ATAG
Saleforce	Feed case with response	Every minute	ATAG
Google Cloud	Knowledge Base	Once a week	Freeday and ATAG

3. Functional requirements

3.1 Bot details

Detail	Value
Name	Ben
E-mail design (header/footer)	TBD by ATAG
AI disclaimer	TBD by ATAG
Default language	Dutch

3.2 Tone of Voice

The initial tone of voice will be configured to be in line with the chat, but with more comprehensive answers.

3.3 Delivery

The table below details in what form the digital employee will be reachable during the different phases of the project.

Phase	Location	Form	Contact
Testing	http://gorenjeps--partialsb.sandbox.my.salesforce.com/	Test cases	Ellen / Hrvoje
Go-live	http://gorenje.my.salesforce.com/	Real cases	Ellen / Hrvoje

4 Scope

4.1 In scope

The scope for this project is to realise a digital employee according to the Process Map Soll in Chapter 2.3.

This project intake describes the full scope of Ben. We will however start with a first scope for Pelgrim.

Phase 1 - Pelgrim

Ben will pick up email and web cases from the Pelgrim Service Queue. This includes questions asked by customer via the contact forms on the website (Storingsformulier and Contactformulier).

Ben will create a draft response and the human agent will send the response after checking it.

Phase 2 - all brands

Once Ben reaches its KPIs for Phase 1, we will start the rollout to other brands.

4.2 Out of scope

All deviations from the detailed Process Map in Chapter 2.4 are assumed to be out-of-scope.

In case unexpected deviations are encountered while running test cases during the Development phase, Freeday aims to solve this issue within the scope of the project. In case this is not possible or desirable, a re-evaluation of the project scope is required which might lead to extra costs due to an increased project length.

In case unexpected deviations are encountered while running production cases during the Hypercare phase, a re-evaluation of the project scope is required which might lead to extra costs due to an increased project length.

Specific activities out of the scope are the following:

4.3 Conditions for succes

- **Salesforce Access & Permissions:** Proper setup of user profiles (e.g., Ben's agent account) with the right permissions to create drafts, send emails, and manage queues.
- **Collaboration & Responsiveness:** Clear communication framework with a 1-day turnaround on project inquiries, ensuring momentum and quick problem-solving.
- **Communication:** important to share the scope of the project with the team in Duiven and keep them involved
- **Case Knowledge:** we need key users in the team that can test and provide feedback on the responses

5 Prerequisites

Before Freeday can start the configuration of Ben, we need the following:

- ☑ ~~Share test cases Pelgrim that are suitable for AI automation **Heidi + JW**~~
  - 20-30 for casehistorie = Email
  - 20-30 for casehistorie = Web
- ☑ ~~Set up user account in Salesforce for Freeday team on p.verdonk@freeday.ai **Ellen**~~
- ☑ ~~Set up user account in Salesforce for the AI Agent: Ben **Ellen**~~
- ☑ ~~Share Salesforce Templates (HTML) **Hrovje**~~

☑ ~~Advice on how to implement Ben into Salesforce: separate queue or as agent in Pelgrim queue~~ **~~Hrvoje~~**

6 Planning

Based on the description of Ben's requirements and tasks, we propose the following planning

Phase 1

Week	Activity	Goal
1	Set up Ben according to Must Haves in chapter 2.3	Bèta test = provide feedback first version
2	Process feedback	User Acceptance Test = final approval for go live
3	Go Live + Hypercare	Go live on Monday Monitor and process feedback rest of week

Phase 2:

Week	Activity	Goal
1	Set up automatic responses and process feedback	UAT
2	Go Live + Hypercare	Go Live

- Once the prerequisites are collected, Freeday will schedule the work above
- As this is a short time period, we expect full commitment of the project team
- We need quick feedback to accommodate for fast iterations