## EXECUTIVE SUMMARY

*This report examines a critical organizational challenge: customer support tickets get lost between slack and email.*

*Our analysis found that this process was designed when regulatory requirements was a real limitation. Previous attempts to fix this addressed symptoms rather than root causes. We've designed a 3-part human-AI collaboration model to transform this workflow.*

### Key Findings

- *Universal consensus confirmed — this isn't one person's complaint, it's a shared organizational pain point.*

- *Root cause identified: this process was designed when regulatory requirements was a real limitation.*

- *Multiple previous fix attempts addressed symptoms rather than the underlying structural issues.*

- *The real goal is lower costs, but the current process has become an end in itself.*

- *A 3-part human-AI collaboration model can transform this workflow using delegating, supervising, approving modes.*

### Recommended Approach

*We recommend a 3-part collaboration model focused on data gathering and initial analysis, communication and stakeholder updates, quality assurance and compliance. AI fully handles 1 outcome within defined guardrails. 1 outcome run on AI with human oversight. Humans lead 1 outcome with AI assistance. Run a 2-week pilot with the morning shift.*

## THE PROBLEM

"Customer support tickets get lost between Slack and email"

### Why This Problem Matters

Universal agreement:

*This isn't one person's complaint — it's a shared organizational pain point that everyone recognizes.*

# WHY IT PERSISTS

*This process was designed when regulatory requirements was a real limitation. The original team built what made sense at the time. The tech startup industry had different pressures then, and the process reflected that reality.*

*The belief that 'this is how it's always been done' has prevented anyone from questioning it. Meanwhile, people have built workarounds: scripts that automate parts nobody talks about.*

*Several workarounds have created informal power structures people want to protect. The real goal is lower costs, but the current process has become an end in itself.*

# THE SOLUTION

## Target Outcomes

*1. Data gathering and initial analysis*

*2. Communication and stakeholder updates*

*3. Quality assurance and compliance*

## Human-AI Collaboration Model

### 1. Data gathering and initial analysis                    Delegating Mode

AI handles:
*Collects data from multiple sources, runs initial analysis, flags anomalies*

Human handles:
*Validates findings, adds context AI can't access, makes final calls*

**Why: AI excels at this type of work. Human relationships matter here.**

### 2. Communication and stakeholder updates                    Supervising Mode

AI handles:
*Drafts communications, maintains consistency, handles routine updates*

Human handles:
*Reviews for tone, handles sensitive messages, manages relationships*

**Why: Routine enough for AI with this type of work. The volume makes automation essential.**

**AI handles:**
*Runs all standard checks, compares against requirements, documents findings*

**Human handles:**
*Reviews exceptions, makes judgment calls, signs off on final output*

**Why: Quality requires this type of work. Patterns are clear and repeatable.**

# MAKING IT HAPPEN

## Change Management

*Start with the highest-volume use case. Get leadership aligned before expanding.*

## Pilot Strategy

*Run a 2-week pilot with the morning shift. Measure before and after, then scale based on results.*

## Continuous Improvement

*Track throughput weekly. Feed human corrections back to improve AI recommendations. Review collaboration modes monthly and adjust based on what's working.*

## How You'll Know It's Working

- *You identified clear metrics during our conversation — track these weekly and compare against your baseline.*

- *For delegated tasks like "data gathering and initial analysis", measure volume handled and exceptions flagged.*

- *For approval workflows, track review time and approval rates.*

# NEXT STEPS

*You identified "customer support tickets get lost between slack and email" as a critical organizational challenge.*

*We traced its origins and found it was designed for constraints that no longer apply.*

*The 3-part solution assigns 1 delegating, 1 supervising, 1 approving collaboration modes to match each outcome with the right human-AI balance.*

*Start with the pilot approach outlined above, then scale based on what you learn.*

## Ready to implement?

*Book a 30-minute call*    |    *Email us*