Expert Pool & AI Triage System

Intelligent Ticket Routing and Workload Management

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Purpose: This guide explains ServiFlow's Expert Pool system—an AI-powered approach to ticket distribution that ensures urgent issues reach the right experts quickly, while giving technicians visibility into incoming work before committing to ownership.

The Traditional Problem

In conventional helpdesk systems, tickets are either randomly assigned or manually dispatched by a manager. This creates several issues:

- **Blind assignment** — Technicians receive tickets without context, leading to reassignments
- **Uneven workload** — Some staff get overloaded while others wait for work
- **Priority confusion** — Urgent tickets can sit unnoticed in queues
- **Manager bottleneck** — Dispatchers become a single point of failure
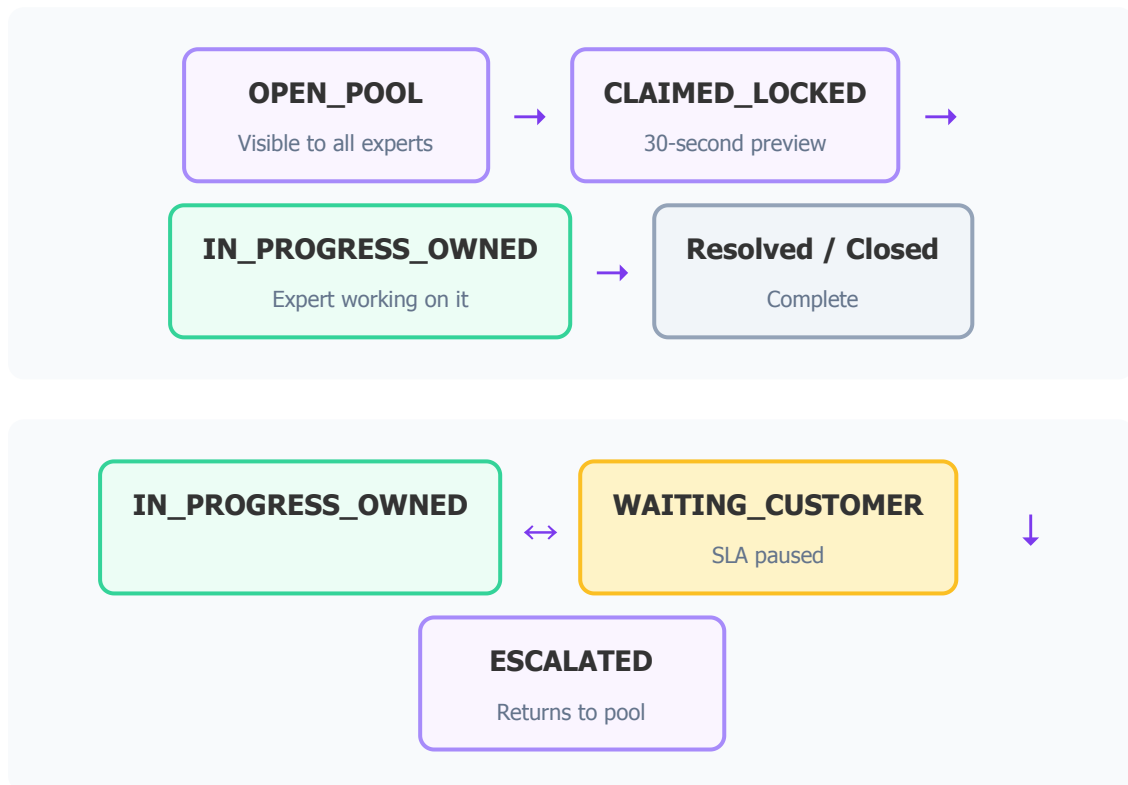
The Expert Pool Solution

ServiFlow's Expert Pool operates like an intelligent "pick list" where:

1. New tickets land in a shared pool visible to all qualified experts
2. AI ranks tickets by urgency, SLA risk, and complexity
3. Experts preview tickets before claiming them
4. SLA timers start when ownership is accepted, not when the ticket is created

Business Benefit:

This model empowers technicians to self-select work they're best suited for, while ensuring critical issues rise to the top automatically.

Ticket Lifecycle in the Pool

OPEN_POOL
Visible to all experts

→

CLAIMED_LOCKED
30-second preview

→

IN_PROGRESS_OWNED
Expert working on it

→

Resolved / Closed
Complete

IN_PROGRESS_OWNED

↔

WAITING_CUSTOMER
SLA paused

↓

ESCALATED
Returns to pool

The Expert Workflow

1 **Browse the Pool**

Experts see all unowned tickets ranked by AI priority score. Higher scores appear at the top. Each ticket shows a preview: title, customer, priority, and time in pool.

2 **Claim for Preview**

Clicking a ticket creates a 30-second "soft lock." During this time, the expert sees the full ticket details, history, and AI suggestions. Other experts see "Being Claimed..." but cannot take the ticket.

Time-Sensitive:

The 30-second preview window prevents "ticket hoarding" while giving experts enough time to make an informed decision.

3 **Accept or Release**

- **Accept Ownership:** The expert becomes the owner. SLA resolution timer starts. Ticket moves to "My Tickets."
- **Release:** The ticket returns to the pool immediately, available for others.
- **Timeout:** If 30 seconds pass without action, the claim expires and the ticket returns to the pool.

4 **Work the Ticket**

Once owned, the expert works toward resolution. They can:

- Set "Waiting on Customer" to pause SLA while awaiting a reply
- Escalate back to pool if they need to hand off
- Transfer to a specific colleague
- Resolve and close

AI-Powered Pool Scoring

Every ticket in the pool receives a score from 0–100. Higher scores indicate greater urgency and appear first in the list.

> **AI-Powered:**
>
> ServiFlow uses AI to analyse each ticket's content, customer context, and SLA status to calculate an intelligent priority score. When AI is unavailable, the system falls back to rule-based heuristics.

Scoring Factors

Factor	Impact on Score	Example
Priority Level	Critical: +30, High: +20, Low: -15	A "Critical" ticket starts at 80 points
SLA Breach Risk	Already breached: +25 Under 1 hour: +20 Under 4 hours: +10	Ticket due in 45 minutes gets +20
Ticket Age	+2 per day (max +10)	A 5-day-old ticket gets +10
Customer Tier	AI considers VIP/Premium status	Premium customer tickets score higher
Content Analysis	AI detects urgency keywords	"Production down" triggers higher score

> **Scoring Example:**
>
> **Ticket:** "Email server not sending - URGENT"
> **Priority:** High (+20)
> **SLA:** Due in 2 hours (+10)
> **Age:** 3 hours (no bonus)

> **AI Analysis:** Detects "server" and "not sending" as service outage (+5)
> **Final Score:** 50 (base) + 20 + 10 + 5 = **85**

Score Refresh

Pool scores are recalculated:

- When a ticket enters the pool
- Every 5 minutes for tickets still in pool
- When SLA deadlines approach (urgency increases automatically)

Pool Status Reference

Pool Status	Meaning	SLA Timer
OPEN_POOL	Available for any expert to claim	Response timer running
CLAIMED_LOCKED	Expert previewing (30-second hold)	Response timer running
IN_PROGRESS_OWNED	Owned by expert, actively working	Resolution timer running
WAITING_CUSTOMER	Blocked on customer response	SLA paused
ESCALATED	Released back to pool	Returns to pool scoring

Business Benefits

Business Benefit:

Faster Response: AI surfaces urgent tickets automatically—no

Business Benefit:

Better Matching: Experts choose tickets they're confident

manager needed to spot emergencies.

handling, reducing reassignments.

Business Benefit:

Fair Workload: Self-selection prevents overloading individual staff members.

Business Benefit:

SLA Accuracy: Resolution timers start at ownership, not creation—measuring actual work time.

Key Metrics to Monitor

Metric	What It Tells You	Healthy Range
Average Time in Pool	How quickly tickets get claimed	< 15 minutes for high priority
Claim-to-Accept Rate	How often previews result in ownership	> 80%
Escalation Rate	How often tickets return to pool	< 10%
Pool Score Distribution	Balance of urgent vs routine work	Bell curve around 50

Frequently Asked Questions

What if no one claims a ticket?

Tickets left in the pool continue to rise in score as SLA deadlines approach. The system can be configured to alert managers when tickets exceed a threshold age or score.

Can managers still assign tickets directly?

Yes. Admins can bypass the pool and assign tickets to specific experts when needed. The ticket will appear in the assignee's "My Tickets" view immediately.

What happens to the SLA if I set "Waiting on Customer"?

The SLA resolution timer pauses. When you resume work, the pause time is deducted from your resolution calculation, ensuring you're not penalised for customer delays.

Can I see who else is looking at a ticket?

When a ticket is claimed for preview, other experts see "Being Claimed by [Name]..." so they know to wait or look at other tickets.

ServiFlow | IT Service Management Platform

For technical support, contact your system administrator.