

Project Pegasus:
An Analytical Framework for AI Bot Optimization

Project Overview

Project Pegasus was a strategic initiative to standardize and scale the delivery of AI bot optimization insights to enterprise clients. It consisted of a codified analytical playbook (the "Pegasus Framework") and a structured training program built upon it.

The Challenge

The insights team was responsible for delivering high-value optimization recommendations, but many analysts lacked deep analytics and product thinking skills. This led to inconsistent report quality and limited the team's ability to scale its services effectively.

The goal was to **upskill the team and standardize the process** to deliver consistent, high-quality, product-relevant insights that would improve client decision-making and demonstrate the value of our AI services.

The Pegasus Framework: A Phased Approach

The framework is a 6-phase, end-to-end process for consulting, analysis, and value delivery.

Phase 1: Project & Stakeholder Alignment

- Establish and manage working teams (for tactical execution) and executive teams (for strategic alignment) with the customer.
- Conduct project kick-offs and schedule regular touchpoints (e.g., QBRs).
- Manage all project management aspects, including budget, deliverables, risks, and communication.

Phase 2: Objective & KPI Definition

- Identify and document the customer's core business objectives.
- Define and map key metrics (KPIs) to those objectives.
- Quantify customer targets, measure the KPI baseline, and compile industry benchmarks.
- Develop a KPI dashboard/scorecard as required.

Phase 3: Analysis & Root Cause Discovery

- Develop a detailed analysis plan based on a library of approaches.
- Perform deep-dive analysis to identify problem areas and quantify their impact on KPIs.
- Focus on discovering the root cause of issues, not just surface-level symptoms.
- Research client-impacting events and industry trends for context.

Phase 4: Recommendation & Prioritization

- Develop actionable recommendations for each finding, assessing technical feasibility and considering innovative solutions.
- Forecast the KPI impact for each recommendation.
- Prioritize all recommendations based on their potential metric impact versus the effort required.
- Present a clear deployment plan to executive stakeholders, tackling the largest opportunities first.

Phase 5: Forecasting & Pre-Deployment Review

- Refine forecasts on metric impacts as recommendations are finalized for a release.
- Review and communicate final forecasts, including all underlying data and assumptions, with both the working and executive teams 2-4 weeks ahead of deployment.

Phase 6: Value Assessment & Optimization

- After deployment, measure the "post-release" KPIs against the "pre-release" baseline.
- Compare actual results to the forecasts and analyze any differences.
- Document the final value assessment, articulating the overall business value and ROI.
- Document lessons learned to feed back into best practices and identify new enhancement opportunities.

The Impact

This framework and the associated training program led to measurable improvements in efficiency and quality:

- **10% improvement** in report quality.
- **15% reduction** in presentation development time.
- Enabled **more consistent, actionable insights** that directly supported client AI bot optimization and product roadmap decisions.