

Playbook

A comprehensive guide for practitioners leveraging AI capabilities to facilitate new ways of working.

February 2026



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Playbook Objectives

Purpose: This playbook is a comprehensive guide for practitioners leveraging AI capabilities to facilitate new ways of working.

✓ WHAT IT IS

- ✓ A practical framework for augmenting work with AI
- ✓ Guidance on leveraging AI tools and methodologies
- ✓ Set of illustrative examples with mock data for learning
- ✓ AI tool-agnostic approaches
- ✓ Best practices for organizational change readiness

✗ WHAT IT IS NOT

- ✗ A prescriptive, one-size-fits-all solution
- ✗ A replacement for your organization's AI policies
- ✗ A substitute for specific subject matter expertise
- ✗ A specific tool recommendation
- ✗ A guarantee of specific results

Understanding the scope and boundaries of this playbook ensures you get maximum value from its contents.

Guiding Principles

This playbook is designed to be generic and agnostic to any specific tools, processes, or organizational structures. As you apply these concepts, always align with your organizational policies and governance frameworks.



Broad Application

Principles apply across industries, company sizes, and transformation contexts



High-Level Methods

Playbook is guidance-driven and does not prioritize any specific methodology over another



Illustrative Examples

Mock data and scenarios demonstrate concepts without real data exposure



Policy Compliant

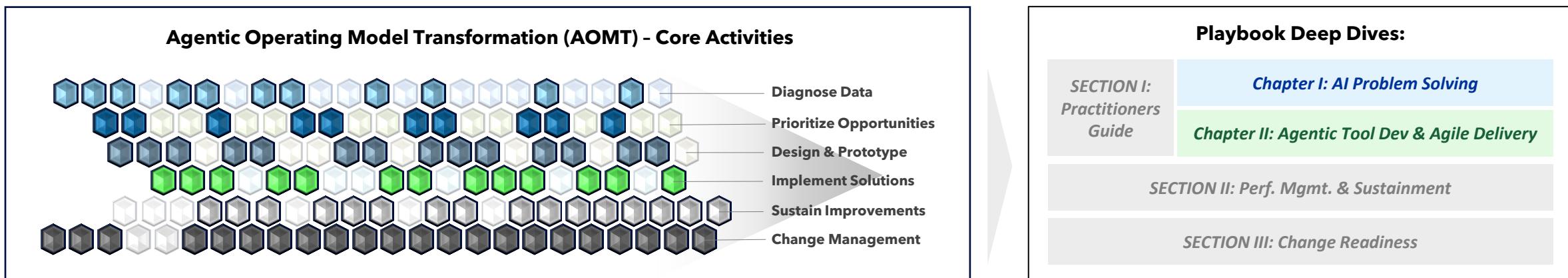
Always defer to your organizational data and AI governance policies

Introducing Agentic Operating Model Transformation (AOMT)

The **Agentic Operating Model Transformation** (AOMT) is a **non-linear approach** to operational transformations that leverages Artificial Intelligence and emerging technologies to move much farther and faster in achieving an organization's objectives.

The method based on two overarching principles:

- **Data First** - ingest and interrogate the data landscape to reveal and verify evidence-based opportunities
- **AI First** - design solutions that take full advantage of AI capabilities to make quantum gains in efficiency



Activities are *iterative* and are frequently done in a concurrent manner to quickly yield "best fit" solutions.

Playbook Structure: Three Sections

Each section showcases exemplary methodologies, approaches, and techniques tied to the following key topics.

SECTION I: PRACTITIONERS GUIDE

CHAPTER I: AI-Empowered Problem Solving

Key topics:

- *Diagnose Data with AI*
- *Prioritize Opportunities*

CHAPTER II: AI Tool / Solution Development & Agile Delivery

Key topics:

- *Design / Prototype AI Tools*
- *Agile Delivery Approach*

SECTION II: SUSTAINMENT

Performance Mgmt. & Sustainment

Key topics:

- *Sustain Improvements*
- *Manage Performance*

SECTION III: READINESS

Organizational Change Management

Key topics:

- *Enable Org. Readiness*
- *Plan Communications*

SECTION 1: PRACTITIONERS GUIDE

Section Chapters:

Chapter I: AI Problem Solving

Chapter II: Agentic Tool Dev

SECTION 1: PRACTITIONERS GUIDE

Playbook Deep Dives:

**SECTION I:
Practitioners
Guide**

Chapter I: AI Problem Solving

Chapter II: Agentic Tool Dev & Agile Delivery

SECTION II: Perf. Mgmt. & Sustainment

SECTION III: Change Readiness



Section Chapters:

Chapter I: AI Problem Solving

Chapter II: AI Tool Dev

Chapter I: AI-Empowered Problem Solving



AI-Empowered Problem Solving

This chapter focuses on leveraging AI to diagnose organizational challenges and identify key opportunities through data-driven insights.

Phase 1 (iterative process)

Data Ingestion & Discovery

Connect to existing data sources and allow AI to surface patterns, anomalies, and opportunities hidden within operational data.

AI-Assisted Diagnosis

Use intelligent analysis to validate hypotheses, challenge assumptions, and reveal evidence-based insights.

Synthesis for Opportunities

Translate key findings into a coherent set of opportunities as concrete, actionable value levers.

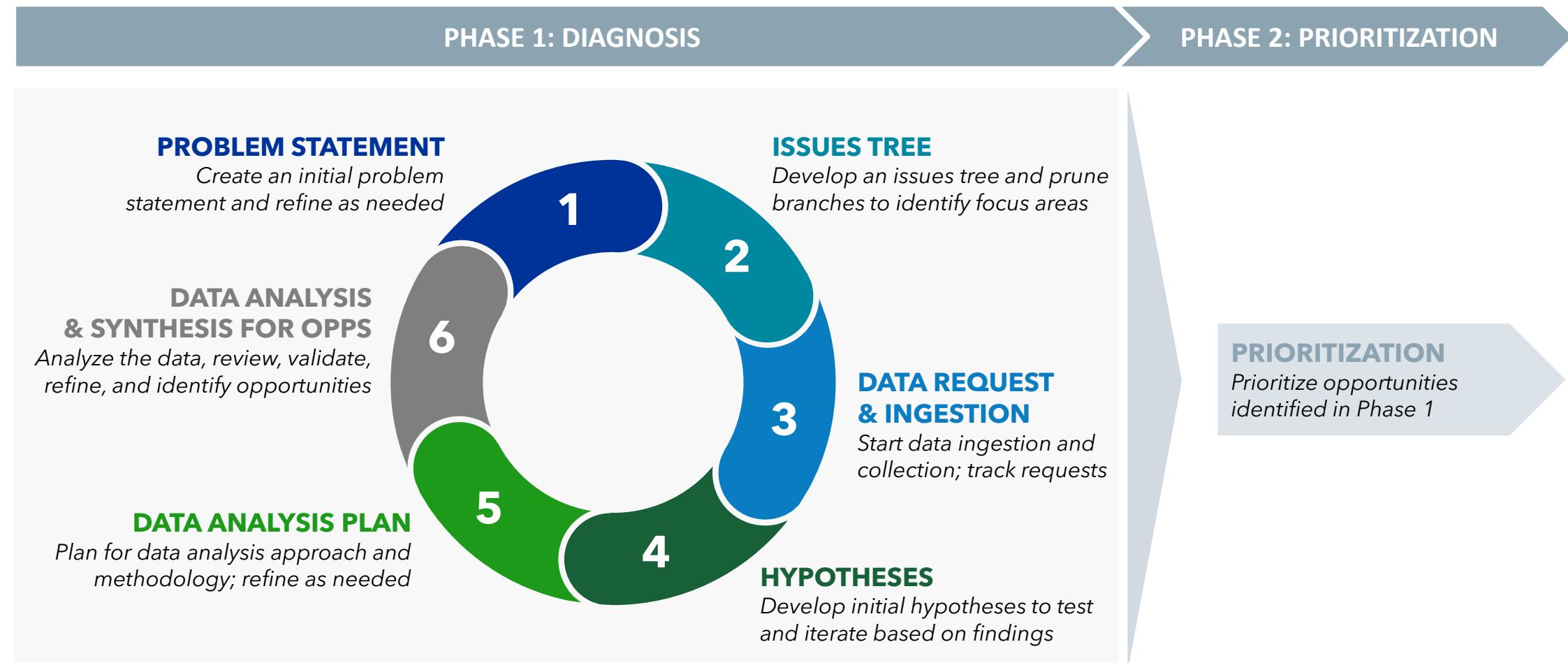
Phase 2

Opportunity Prioritization

Rank and prioritize the identified opportunities based on impact, feasibility, time criticality, and strategic alignment.

Phase 1: Diagnosis

Diagnose activities are iterative and continue until the solutions team is comfortable that the problem has been distilled to its most exhaustive level with discrete opportunities identified.



Note: This chapter walks through each topic step by step, using a case study to bring the concepts to life through examples.

Phase 1: Diagnosis | Initial Problem Statement

A draft problem statement can be useful in creating the initial data request. Characterizing the issue in a structured way will help ensure that the first data request is broad enough to provide useful insights. An initial Problem Statement should include the following elements:

DESCRIPTION

A high-level summary of the “problem to be solved”, in everyday terminology



DECISION MAKERS

Who are the accountable parties who will be making decision on improvement options



BOUNDARIES

What aspects of the problem are off-limits, or what regulations could constrain solutions



TIMEFRAME

How will effective solutions be reflected in business metrics (i.e., financial, operational, quality)



CUSTOMERS

A list of all the end-users, intermediaries and leaders who are impacted by the problem



DECISION DRIVERS

What factors will likely influence decision makers (i.e., adjacent concerns, conflicting agendas)



SUCCESS MEASURES

How will effective solutions be reflected in business metrics (i.e., financial, operational, quality)



Important: This is an iterative, data-driven process. As additional data is ingested, assumptions will be validated, root causes will be surfaced, and hypotheses will be tested and refined accordingly.



Phase 1: Diagnosis | Initial Problem Statement - example

Stated Business / Operations Concern: Metro Cable has an upcoming Rate Case with the Public Service Commission (PSC) requesting a 7% basic fee increase for customers. The PSC has a history of reasonableness regarding rate increase for economic reasons when customer satisfaction is high. Currently, Metro Cable customer satisfaction scores are low (55/100 ACSI). Metro Cable leadership is concerned that the Rate Case will fail unless customer satisfaction rating meet or exceed ratings for other utilities (i.e., gas, electric, phone) which historically have been higher (74/100 ACSI).

Initial Problem Statement:

	<p>Description: Metro Cable has comparatively low customer satisfaction and is looking to improve customer satisfaction ratings.</p>
	<p>Customers: <ul style="list-style-type: none"> Business and Residential Cable Customers Public Service Commission </p>
	<p>Decision Makers: <ul style="list-style-type: none"> Metro Cable Executive Committee </p>
	<p>Decision Drivers: <ul style="list-style-type: none"> Capital Investment Constraints Regulations </p>
	<p>Boundaries: <ul style="list-style-type: none"> Basic Service Pricing Contracts with Content Providers Current Customers </p>
	<p>Success Measures: <ul style="list-style-type: none"> Customer Satisfaction Ratings Rate Case Approval </p>
	<p>Time Frame: <ul style="list-style-type: none"> 12 months until next PSC Rate Case hearing </p>

Note: An Initial Problem Statement is a first glance structuring of the stated issue, this first version will serve as a starting point of creating an Issues Tree and can be used to inform the Initial Data Request. The Problem Statement will likely be revised over time as additional insights are collected.

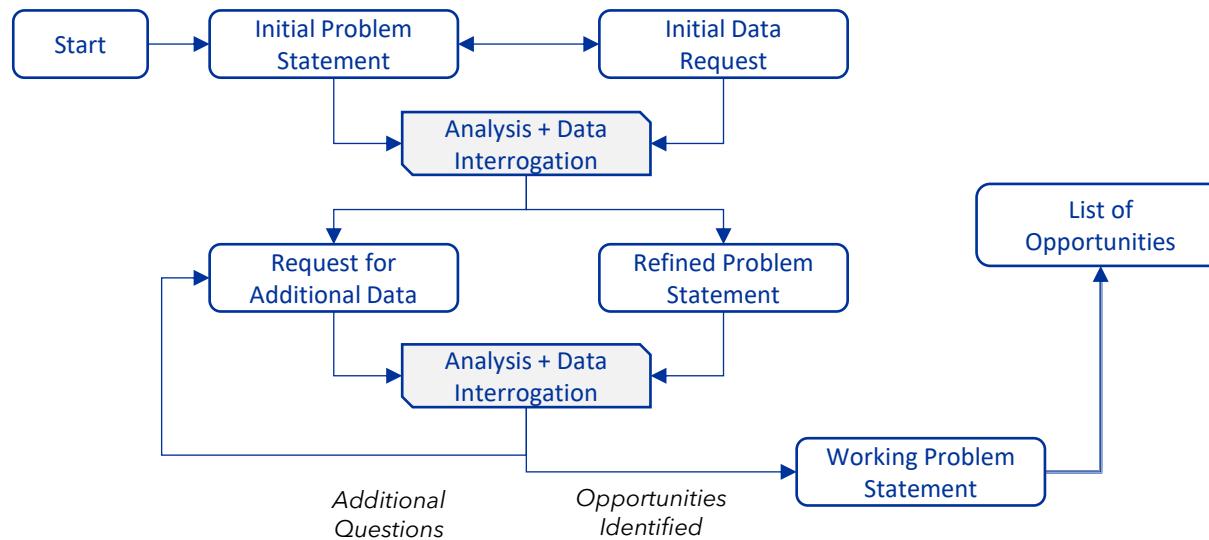


Phase 1: Diagnosis | Problem Statement Evolution

Problem Statement

- An initial problem statement can be derived from early conversations about the issue to be addressed
- This draft version can be used as input to render a “first pass” data request

Note: The process of defining the problem and compiling data is an iterative process. Subsequent slides will focus on creating an Issues Tree to further focus improvement efforts. Based on the completed Issues Tree, problem statement and data request revisions are likely.



There is no “magic” number of cycles needed to refine initial Problem Statements; however, it is unlikely that the initial Problem Statement will remain unrevised once data is fully reviewed.

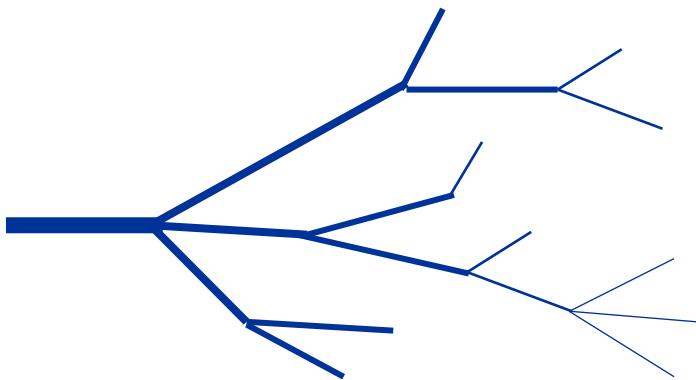
Teams should challenge the Working Problem Statement along with all assumptions and Hypotheses throughout the improvement effort and solution prototyping.



Phase 1: Diagnosis | Issues Tree - disaggregation of the issues

Issues Tree

- An Issues Tree is a structured approach of breakdown an issue into its logical parts.
- Typically depicted horizontally, the trunk of the tree is the Problem Description for the Problem Statement
- Figuratively speaking, branches, sub-branches emerge from the trunk and continue breaking down into twigs and leaves



Each level of an Issue Tree breaks down a higher-level component into its sub-component parts.

For example:

Inventory Volume is a function of:

- Inbound Replenishment
- Outbound Fulfillment

Inbound Replenishment is a function of:

- Order Timing
- Vendor Shipping

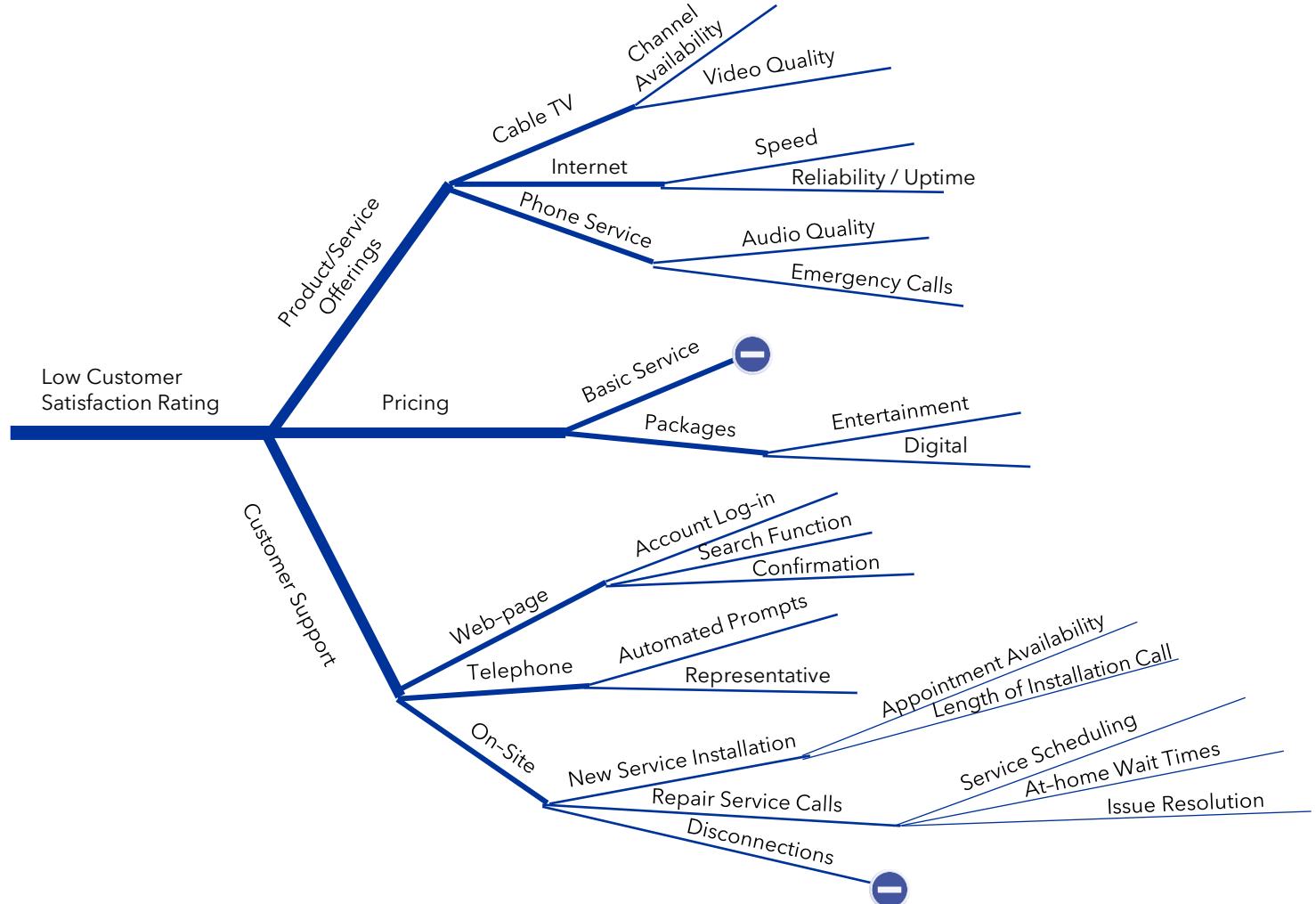
Notes:

- Creating an Issues Tree should be a "**team exercise**" so that multiple perspectives are considered and can be captured
- Constructing an Issues Tree should be an **exhaustive and exclusive** exercise where time is taken to capture all the components of an issue while ensuring that the branches are exclusive (i.e., not overlapping)



Phase 1: Diagnosis | Issues Tree - example

Metro Cable Issues Tree



- Customer satisfaction ratings for Metro Cable represent an aggregation of many factors that influence the customer experience.
- Breaking down the issue into its component parts using an Issue Tree to capture all aspects of the problem will help ensure that Data Requests are both well-focused and comprehensive.

Note:

Boundaries listed in the Problem Statement cite Basic Service Fees are not to be considered, and that efforts should focus on Current Customers. Therefore, those branches are not broken down further in this initial version of the Issues Tree. Subsequent information may suggest that these branches be reconsidered with Metro Cable leadership approval.



Phase 1: Diagnosis | Data Request: Understanding the Data Landscape

Following the Issues Tree, we aim to understand what data exists, where it lives, and how it can be used to validate, quantify, and target the identified issues, informing a focused data request list and an effective data collection process.

Data Origins

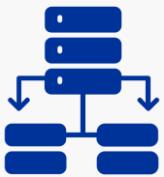


Unstructured data in the form of emails, text messages and physical documentation.



Structured data in the form of data feeds, on-line forms, and downloads.

Data Platforms



Applications, systems, and databases in which data is ingested and stored for subsequent use

Data Engineering



Cleansing, editing, deduplication, standardization, integration, aggregation and other activities that render ingested data into usable forms

Data Use



Business processing, analysis, reporting and other end states of data flowing through the organization

Data First investigations use data logs and system information to follow transactional data through the organization's systems and processes looking for anomalies and trends that signal inefficiencies and opportunities for improvement.



Phase 1: Diagnosis | Data Request – example

A critical part of Diagnose Data activities is ingesting all pertinent data for analysis. AOMT Data Requests differ from traditional requests because in addition to typical transaction data, we are also seeking machine/system logs and unstructured data in the request.

The screenshot shows the Digital Data Request Tracker interface. On the left, there's a sidebar with 'Projects' (selected), 'Create New Project', 'Select Project' (set to 'Project_Test (doker)'), 'Share Project', 'Shared with (2)', 'Upload Received Files' (0), 'Uploaded Files (6)', 'Project Info', and 'Filters'. The main area has a title 'Digital Data Request Tracker' and tabs for 'Request List', 'Tracker Dashboard', and 'Status Update Generator'. Under 'Request List', it says 'Project: Project_Test (shared by doker)'. Below that are two sections: 'Establish Initial Request List' and 'Upload Existing List'. The 'Upload Existing List' section contains an 'Important' note about required columns and a 'Drag and drop files here' input field. To its right is the 'AI Generate List' section with an 'Upload documents (optional)' note and a 'Browse files' button.

Digital Data Request Tracker is a flexible agent that can be used to build, present, and manage data requests.

Typically, the process using this tool includes:

1. Create/upload Requests List (either upload an existing one or generate with AI)
2. Review and Edit the Requests List as needed (add/remove as well as validate tasks, owners, status, dates and resolve any overlapping requests)
3. Upload Received Files to the Tracker (AI-enabled tracking)
4. Review the latest status in the Tracker Dashboard
5. Extract Status Data (excel-based full tracker and/or PPT data request status update deck) using Status Update Generators
6. Iterative review and data collection process to close all outstanding items collaborating with the team

Note: Not only does AOMT produce AI enabled tools to solve business issues, but AI enabled tools are also used throughout AOTM activities to increase the speed and quality.



Phase 1: Diagnosis | Data Request - example continued

Using the AI Tool, a Data Request can be generated based on the Initial Problem Statement. Later as more details are known the Data request can be update to include additional insights.

Project Name: Metro Cable Project Material: Request Tracker Date: 11/24/2025												
Request Type	Category	Request Item	Description	Owner	Status	Overdue?	Requested On	Due Date	Remaining Gaps	Follow-on Questions	File Name	Notes
Data	Customer Satisfaction	Historical ACSI scores and customer satisfaction survey data	Detailed customer satisfaction scores (ACSI) for Metro Cable over the past 3-5 years, including new service installations	Customer Experience Team	Requested		11/21/2025	12/01/2025				Include comparison data with other utilities
Data	Customer Support	New service installation performance metrics	Complete dataset on new service installations including scheduled vs actual installation times	Operations Team	Requested		11/21/2025	12/01/2025				Prioritize last 12-24 months of data for
Data	Customer Support	Repair service call data and resolution metrics	Detailed repair service call logs including call volume, response times, time to resolution, average wait times, call abandonment rates, first call resolution rates	Field Services Team	Requested		11/21/2025	12/01/2025				Include root cause categorization if
Data	Customer Support	Call center performance and customer service metrics	Call center data including average wait times, call abandonment rates, first call resolution rates	Customer Service Team	Requested		11/21/2025	12/01/2025				Request includes IVR navigation data and
Data	Pricing & Billing	Pricing information, billing accuracy, and dispute data	Pricing by packages in entertainment and digital statistics on billing error rates, customer disputes	Billing Department	Requested		11/21/2025	12/01/2025				Include data on billing clarity and customer
Data	Product/Service Offerings	Service reliability, quality, and outage data	Video/audio quality metrics, cable TV channel availability, internet speed, reliability and	Network Operations Team	Requested		11/21/2025	12/01/2025				Break down by geographic region if
Data	Competitive Analysis	Competitor benchmark data and market analysis	Pricing comparison, service offerings, customer satisfaction scores, and market share data for	Strategy Team	Requested		11/21/2025	12/01/2025				Focus on utilities with higher ACSI scores
Data	Finance	Rate case historical data and PSC decision documentation	Previous rate case submissions, PSC decisions and feedback correlation between customer	Regulatory Affairs Team	Requested		11/21/2025	12/01/2025				Include any PSC guidance on customer
Meeting	Stakeholder Alignment	Kickoff meeting with Metro Cable leadership	Initial meeting to align on project scope, objectives, timeline, and key stakeholders.	Project Manager	Requested		11/21/2025	12/01/2025				Include representatives from
Meeting	Subject Matter Expert	Customer Experience team interview sessions	Series of interviews with Customer Experience team to understand current pain points, recent	Customer Experience	Requested		11/21/2025	12/01/2025				Schedule 2-3 sessions with different team
Tech	Data Access	Access to customer database and analytics systems	User credentials and permissions for customer relationship management (CRM) system, billing	IT Department	Requested		11/21/2025	12/01/2025				Read-only access required for analysis
Data	Customer Feedback	Qualitative customer feedback and verbatim comments	Open-ended survey responses, social media mentions, complaint letters, and any other	Customer Insights Team	Requested		11/21/2025	12/01/2025				Text analytics may be needed for large
Data	Operations	Employee training and staffing data	Training completion rates, employee satisfaction scores, staffing levels vs demand, technician	Human Resources Team	Requested		11/21/2025	12/01/2025				Focus on customer service and field
Meeting	Regulatory	PSC requirements and expectations briefing	Meeting with Regulatory Affairs to understand PSC expectations, timeline for rate case	Regulatory Affairs Director	Requested		11/21/2025	12/01/2025				Clarify target ACSI score needed for
Data	Process Documentation	Current customer journey maps and process documentation	Existing documentation of customer touchpoints, service delivery processes, escalation	Process Excellence Team	Requested		11/21/2025	12/01/2025				Include any Six Sigma or Lean projects

1 Based on the Initial Problem Statement, the AI Tool recommends requesting a comprehensive data set across the full spectrum of potential contributors to low levels including billing and network operations.

2 Based on what the team has learned about the **data landscape, Issues Tree** and **Initial Hypotheses**, the team should refine the Data Request to ensure proper coverage while avoiding assemblage of less relevant data.



Phase 1: Diagnosis | Data Request: Risks & Considerations

AI Analysis tools (discussed later) can render multiple analyses quickly; however, when making data requests team should consider practicality of the request based on the problem to be solved.



Overly Comprehensive

Pros

- In general, a comprehensive data request is preferred as the subsequent analysis will reveal hidden contributors to the problem, or areas of significance that had not been initially considered.
- Getting more data earlier can help eliminate multiple subsequent requests that may prove frustrating for both the data team and those analyzing the data.

Cons

- Large data requests, especially from multiple sources (omni-channel) may delay data availability
- Conducting data engineering on multiple data sets can consume valuable time and may not enhance the analysis results
- Teams can unwittingly succumb to analysis paralysis and miss out on opportunities to secure quick wins



Too Limited

Pros

- Highly focused data requests can be fulfilled more rapidly, allowing teams to reveal opportunities and pursue quick win solutions.
- Fewer data sets simplifies data engineering and allows teams to quickly engage in analysis to validate hypotheses.

Cons

- A too tightly focused data request can lead teams away from larger opportunities or require subsequent data request that may slow down progress
- Analyzing the problem from a limited viewpoint can reduce the ability to identify potential unintended consequences of proposed solutions
- Team can unwittingly succumb to missing the forest of opportunities by looking at intensely at a single tree.

Crafting an appropriate data request that balances these considerations is the “art” behind the “science”.



Phase 1: Diagnosis | AI Enabled Research - example

Employing AI Tools to conduct basic research related to the Problem Statement can help confirm and/or reshape initial impressions regarding the problem to be solved.

Prompt:

Summarize trends in customer satisfaction scores within the Utilities industry including key drivers of customer satisfaction

Overall Satisfaction Trends

The utilities industry is experiencing divergent trends between residential and business customers:

Residential Customers: Satisfaction has declined for a fourth consecutive year to 707 (on a 1,000-point scale) for electric utilities. The ACSI Energy Utilities Study 2025 shows residential customer satisfaction slipped 1% to an ACSI score of 74 (out of 100). Water utilities are also struggling, with overall customer satisfaction at 515, down 2 points from 2024.

Business Customers: In contrast, overall business customer satisfaction with electric utilities increased 30 points to 784 in 2024, following several years of declines.

Key Drivers of Customer Satisfaction

1. Price and Value Perception (Most Critical)

The average monthly residential electric bill reached \$182 nationally in 2024, the highest amount ever recorded by J.D. Power, while water bills rose from \$95 to \$101 per month

Prompt:

Summarize customer satisfaction ratings for the top ten Cable Providers including key drivers of customer satisfaction

Top-Providers (Multiple-sources~ACSI/J.D.Power):

- 1.→Verizon-Fios: 77/100 (ACSI), consistently #1 in East
- 2.→AT&T-Fiber: 78-80/100 (ACSI), highest fiber satisfaction
- 3.→Google-Fiber: High satisfaction across metrics
- 4.→Xfinity: 67-71/100, improved significantly to 3rd place overall
- 5.→T-Mobile-5G-Home: 76-78/100
- 6.→Spectrum: 63-71/100 (improved 4% in 2025)
- 7.→Cox: 63/100
- 8.→Frontier: Lower scores, "notorious for poor customer service"
- 9.→Optimum: Among lowest performers

Key-Drivers-of-Customer-Satisfaction

1. Value-for-Price (Most-Critical)

The study measures satisfaction based on seven dimensions: value-for-price-paid; consistently-delivering-high-quality-service; level of trust with provider; ease-of-doing-business; people; digital-tools; and resolving problems or complaints. Price-satisfaction-is-paramount, with 82% of cable-TV customers subscribing to at least one streaming service, indicating price-sensitivity drives switching behavior.

2. Performance-and-Reliability

Verizon-Fios ranked first in overall internet performance thanks to its top-five satisfaction.

Initial characterizations of the Metro Cable situation appear to be valid based on some simple AI prompts:

- Current Customer Satisfaction ratings are well below the Utilities Industry average (74/100)
- Likewise, amongst cable providers, current customer satisfaction ratings for Metro Cable (55/100) place it at the bottom of peers

Important: AI tools can make mistakes. Entering the same prompt into multiple AI tools or prompting a second AI tool to validate the output of the first tool can help reduce risks. Always validate key facts before using the AI output for critical decision making.



Phase 1: Diagnosis | AI Enabled Research - example continued

Another simple AI prompt suggests Metro Cable concerns about current customer satisfaction ratings potentially having a negative impact on PSC approval of the upcoming rate case.

Prompt:

Summarize the impact of Customer Satisfaction scores on Utilities Rate Case approval when presented to Public Service Commissions for approval

Impact-of-Customer-Satisfaction-Scores-on-Utility-Rate-Case-Approval¶

Direct-Financial-Penalties-Through-Negative-Revenue-Adjustments-(NRAs)¶

2 Customer-satisfaction-performance-has-become-a-formalized-enforcement-mechanism-in-utility-regulation, with-direct-financial-consequences-that-affect-rate-case-outcomes.¶

New-York-State-Model: Utility-failure-to-meet-customer-service-targets-results-in-financial-penalties-or-negative-revenue-adjustments-(NRAs), which-reduce-shareholder-earnings, and-are-automatically-credited-to-customers-under-each-utility's-respective-rate-plan-or-deferred-until-the-next-rate-case. In-2024-alone, penalties-or-NRAs amounted-to-approximately-\$28.9-million-for-customer-service-performance-measure-failures, following-\$23.5-million-in-financial-penalties-against-5-utilities-in-2024-for-failing-to-meet-2023-customer-service-standards.¶

Escalating-Penalties-for-Repeat-Failures: Given-that-NYSEG-had-failed-its-Customer-

Key-Customer-Service-Metrics-Monitored-by-Public-Service-Commissions¶

Commissions-typically-track-and-enforce-performance-on:¶

1

- 1.→Customer-Satisfaction-Survey-scores--The-most-direct-measure¶
- 2.→PSC-Complaint-Rate--Complaints-per-100,000-customers¶
- 3.→Call-Answer-Rate--Speed-of-customer-service-response¶
- 4.→Estimated-Bill-accuracy--Billing-quality-metrics¶
- 5.→Problem-Resolution-time--Service-restoration-metrics¶

The-Commission's-rate-orders-for-most-utilities-set-the-PSC-Complaint-Rate-target-as-the-number-of-SRS-complaints-per-100,000-customers.¶

Regulatory-Framework-and-Enforcement¶

Performance-Based-Ratemaking; Performance-based-ratemaking-ties-utility-profits-to-

than-ever.¶

Best-Practices-for-Utilities¶

3

- Based-on-the-evidence, utilities-seeking-favorable-rate-case-outcomes-should:
 - 1.→Maintain-minimum-satisfaction-thresholds-to-avoid-automatic-NRAs¶
 - 2.→Build-strong-brand-appeal-through-community-engagement-and-transparent-communications¶
 - 3.→Document-service-improvements-tied-to-capital-investments-requested-in-rate-cases¶
 - 4.→Proactively-address-complaints-before-they-escalate-to-PSC-complaints¶
 - 5.→Invest-in-customer-service-infrastructure-as-evidence-of-commitment-to-service-quality¶

4

Bottom-Line: Customer-satisfaction-scores-have-evolved-from-soft-metrics-to-hard-financial-consequences-that-directly-reduce-approved-revenue-requirements-by-millions-of-dollars-and-can-trigger-escalating-penalties-for-repeated-failures. High-customer-satisfaction-facilitates-rate-case-approval, while-poor-performance-creates-regulatory-resistance-and-reduces-the-likelihood-of-receiving-requested-rate-increases.¶

Note:

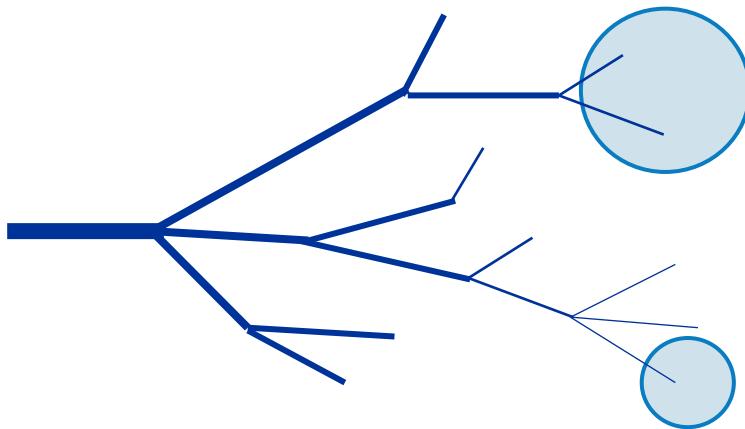
In addition to relevant details regarding rate case approvals¹ and customer satisfaction, this output also offers insights on key metrics² and PSC considerations that will help inform how solutions (once implemented) can be included in the rate case documentation³ to increase the likelihood of a favorable outcome⁴.

Important: AI tools can make mistakes. Entering the same prompt into multiple AI tools or prompting a second AI tool to validate the output of the first tool can help reduce risks. Always validate key facts before using the AI output for critical decision making.



Phase 1: Diagnosis | Initial Hypotheses (Day 1 Thinking)

Based on details in the problem statement and some basic research teams should begin developing an initial set of Hypotheses which can help shape the Data Analysis Plan.



- Comparing the results of basic research against the initial **Issues Tree** can suggest those sub-components that are likely contributors to the overall problem.
- For each identified branch**, the team should create both a Null Hypothesis and an Alternative Hypothesis which can be used in subsequent data analysis.

H₀ - **Null Hypothesis** | Changes in the characteristics of this sub-component will have "no effect" or will make "no difference" relative to the overall problem.

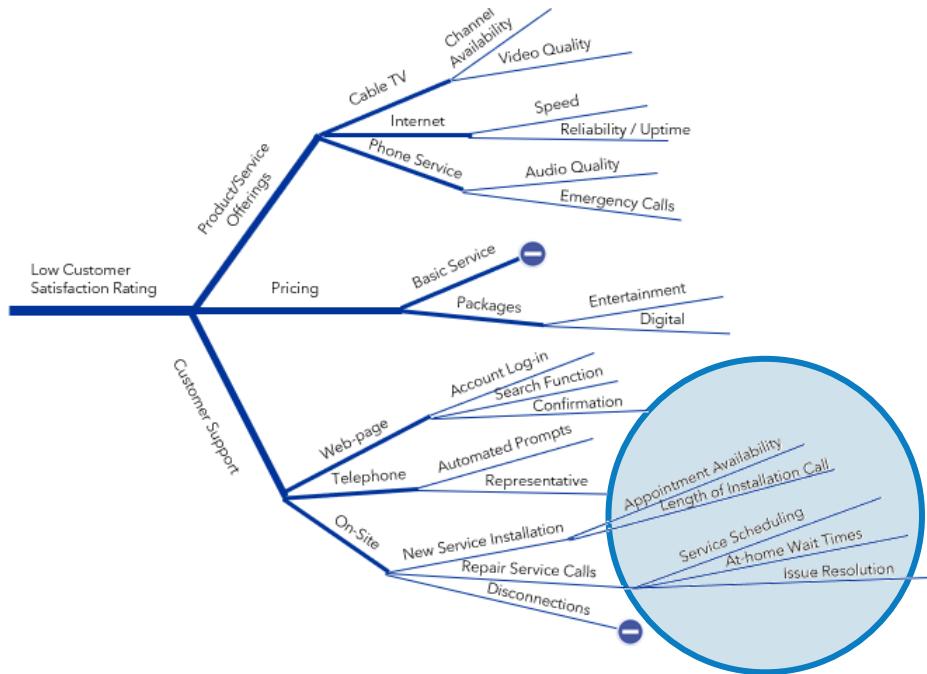
H_a - **Alternative Hypothesis** | Changes in the characteristics of this sub-component *cannot be proven to have "no effect"* or will make "no difference" relative to the overall problem. *Essentially "accepting" the Alternative Hypothesis indicates that the sub-component might be a contributor to the problem.*

Note: To be consistent with the principles of Hypothesis Testing, the Null Hypothesis assumes that there is "no effect". Testing the Null Hypothesis attempts to "prove" that there is "no effect". If the team cannot prove there is "no effect" then by tradition the Null Hypothesis is rejected, and the team accepts the Alternative Hypothesis which in a practical sense suggests that the sub-component is worth looking at as a contributor to the overall problem.



Phase 1: Diagnosis | Initial Hypothesis (Day 1 Thinking) - example

The submitted Data Request will look at several branches of the Issues Tree and subsequent data analysis will reveal which branches are most impactful. Basic research and previous service industry experience prompts the team's Day 1 Thinking to be *curious* about the Customer Support branch and specifically New Service Installation and Repair Service Calls.



The team develops a set of Hypotheses to test against requested data:

Issue	H ₀ - Null Hypothesis	H _a - Alternative Hypothesis
Appointment Availability	Inability to get a desired appointment time for installation does not impact Customer Satisfaction	Getting a desired appointment time for service installation may have an impact on customer satisfaction
Length of Installation Call	The length of the installation call does not have an impact on Customer Satisfaction	Lengthy installation calls may have an impact on Customer Satisfaction
Service Scheduling	Inability to schedule a convenient time for a service visit does not impact Customer Satisfaction	Scheduling a convenient time for a service visit may have an impact on Customer Satisfaction
At-home Wait Times	Time required to wait at-home for a service visit does not impact Customer Satisfaction	Time required to wait at-home for a service visit may have an impact on Customer Satisfaction
Issue Resolution	Issue resolution during a service visit does not have impact on Customer Satisfaction	Issue resolution during a service visit may have an impact on Customer Satisfaction

Note: Accepting the Alternative Hypothesis does not confirm a cause-and-effect relationship but can be used to narrow the list of contributing factors to those that are more highly likely to have a role in solving higher level issues.



Phase 1: Diagnosis | Refined Data Request - example

A revised data request will reflect an edited form of the AI generated request with **additional requested data that aligns to initial Hypotheses**.

Project Name: Metro Cable Project							
Material: Request Tracker							
Date: 1/21/2026							
Request Type	Category	Request Item	Description	Owner	Status	Overdue?	Requested On
Data	Customer Satisfaction	Historical ACSI scores and customer satisfaction survey data	Detailed customer satisfaction scores (ACSI) for Metro Cable over the past 3-5 years, including	Customer Experience Team	Requested		11/21/2025
Data	Customer Support	Call center performance and customer service metrics	Call center data including average wait times, call abandonment rates, first call resolution rates,	Customer Service Team	Requested		11/21/2025
Data	Pricing & Billing	Pricing information, billing accuracy, and dispute data	Pricing by packages in entertainment and digital, statistics on billing error rates, customer disputes,	Billing Department	Requested		11/21/2025
Data	Product/Service Offerings	Service reliability, quality, and outage data	Video/audio quality metrics, cable TV channel availability, internet speed, reliability and	Network Operations Team	Requested		11/21/2025
Data	Competitive Analysis	Competitor benchmark data and market analysis	Pricing comparison, service offerings, customer satisfaction scores, and market share data for	Strategy Team	Requested		11/21/2025
Data	Finance	Rate case historical data and PSC decision documentation	Previous rate case submissions, PSC decisions and feedback, correlation between customer	Regulatory Affairs Team	Requested		11/21/2025
Meeting	Stakeholder Alignment	Kickoff meeting with Metro Cable leadership	Initial meeting to align on project scope, objectives, timeline, and key stakeholders.	Project Manager	Requested		11/21/2025
Meeting	Subject Matter Expert	Customer Experience team interview sessions	Series of interviews with Customer Experience team to understand current pain points, recent	Customer Experience	Requested		11/21/2025
Tech	Data Access	Access to customer database and analytics systems	User credentials and permissions for customer relationship management (CRM) system, billing	IT Department	Requested		11/21/2025
Data	Operations	Employee training and staffing data	Training completion rates, employee satisfaction scores, staffing levels vs demand, technician	Human Resources Team	Requested		11/21/2025
Meeting	Regulatory	PSC requirements and expectations briefing	Meeting with Regulatory Affairs to understand PSC expectations, timeline for rate case	Regulatory Affairs Director	Requested		11/21/2025
Data	Process Documentation	Current customer journey maps and process documentation	Existing documentation of customer touchpoints, service delivery processes, escalation	Process Excellence Team	Requested		11/21/2025
Data	Customer Support	Repair service call data and resolution metrics by technician, comments fields	Detailed repair service call logs including call volume, response times, time to resolution, at-	Field Services Team	Requested		11/21/2025
Data	Customer Support	New service installation performance metrics including cancellation and	Complete dataset on new service installations including scheduled vs actual installation times,	Operations Team	Requested		11/21/2025
Data	Customer Feedback	Qualitative customer feedback and verbatim comments - complaint log & PSC	Open-ended survey responses, social media mentions, complaint letters, and any other	Customer Insights Team	Requested		11/21/2025
Data	Procurement	Equipment inventories turns and vendor turnaround times	Stocking levels, out-of-stock occurrences, and usage trends	Procurement Team	Requested		11/21/2025
Data	Web Team	Web site analytics, log data indicating user navigation	Usage levels and trends about how users are engaging with the web site	Data Team	Requested		11/21/2025

1

Some of the requests indicated by the AI Tool may include other types of requests (i.e., meetings, interview requests, etc.) as indicated in the "Request Type" column.

2

After reviewing the AI Tool recommendations, the team may edit some requested items to include additional data dimensions to reflect areas of interest aligning with the initial Hypotheses.

- 3 Comparing AI Tool recommendations with the Issues Tree, the team may identify gaps or additional desired data that might reveal deeper layers of the problem. Additional data requests can be added as part of the editing process before submitting the Data Request.



Phase 1: Diagnosis | Data Analysis Plan

While waiting for responses to the initial Data Request, teams can begin planning for data analysis based on the Hypotheses to be tested by creating a Data Analysis Plan.

A well-crafted Data Analysis Plan will conclude:

- Issue – the branch of the Issues Tree against which the Hypotheses apply
- H_0 – the null hypothesis (“no effect”)
- H_a – the alternative hypothesis (“no effect” can not be proven)
- Data Source – what data in the Data Request will be used for the analysis
- Planned Analysis – what analysis is planned to test the hypothesis
- Lead – who is responsible for conducting the analysis

Issue	H0	Ha	Data Source	Planned Analysis	Lead



Phase 1: Diagnosis | Data Analysis Plan - example

While waiting for responses to the initial Data Request, teams can begin planning for data analysis based on the Hypotheses to be tested by creating a Data Analysis Plan.

Issue	H ₀	H _a	Data Source	Planned Analysis	Lead
Appointment Availability	Inability to get a desired appointment time for installation does not impact Customer Satisfaction	Getting a desired appointment time for service installation may have an impact on customer satisfaction	<ul style="list-style-type: none"> Call Center data logs Web site data files Dispatch data logs Work order system data Customer complaint logs 	<ul style="list-style-type: none"> Scheduled Installations vs work order completion Changes to originally scheduled dates Lag time between first contact and scheduled date Customer complaints 	Chris Z.
Length of Installation Call	The length of the installation call does not have an impact on Customer Satisfaction	Lengthy installation calls may have an impact on Customer Satisfaction	<ul style="list-style-type: none"> Work order system data Customer complaint logs 	<ul style="list-style-type: none"> Order start to finish times Orders against complaints 	Abigail G.
Service Scheduling	Inability to schedule a convenient time for a service visit does not impact Customer Satisfaction	Scheduling a convenient time for a service visit may have an impact on Customer Satisfaction	<ul style="list-style-type: none"> Call Center data logs Web site data files Dispatch data logs Work order system data Customer complaint logs 	<ul style="list-style-type: none"> Lag time between first contact and service visit Dry runs - customer not home Reschedules Cancelled orders Customer complaints 	Yaz K.
At-home Wait Times	Time required to wait at-home for a service visit does not impact Customer Satisfaction	Time required to wait at-home for a service visit may have an impact on Customer Satisfaction	<ul style="list-style-type: none"> Dispatch data logs Work order system data Customer complaints 	<ul style="list-style-type: none"> Service completion time within scheduled service window Reschedules Cancelled orders Customer complaints 	Sam N.
Issue Resolution	Issue resolution during a service visit does not have impact on Customer Satisfaction	Issue resolution during a service visit may have an impact on Customer Satisfaction	<ul style="list-style-type: none"> Work order system Customer complaints 	<ul style="list-style-type: none"> Work not completed -reason codes Reschedules for 2-Tech crews Customer complaints 	Jamie W.



Phase 1: Diagnosis | Data Analysis - example

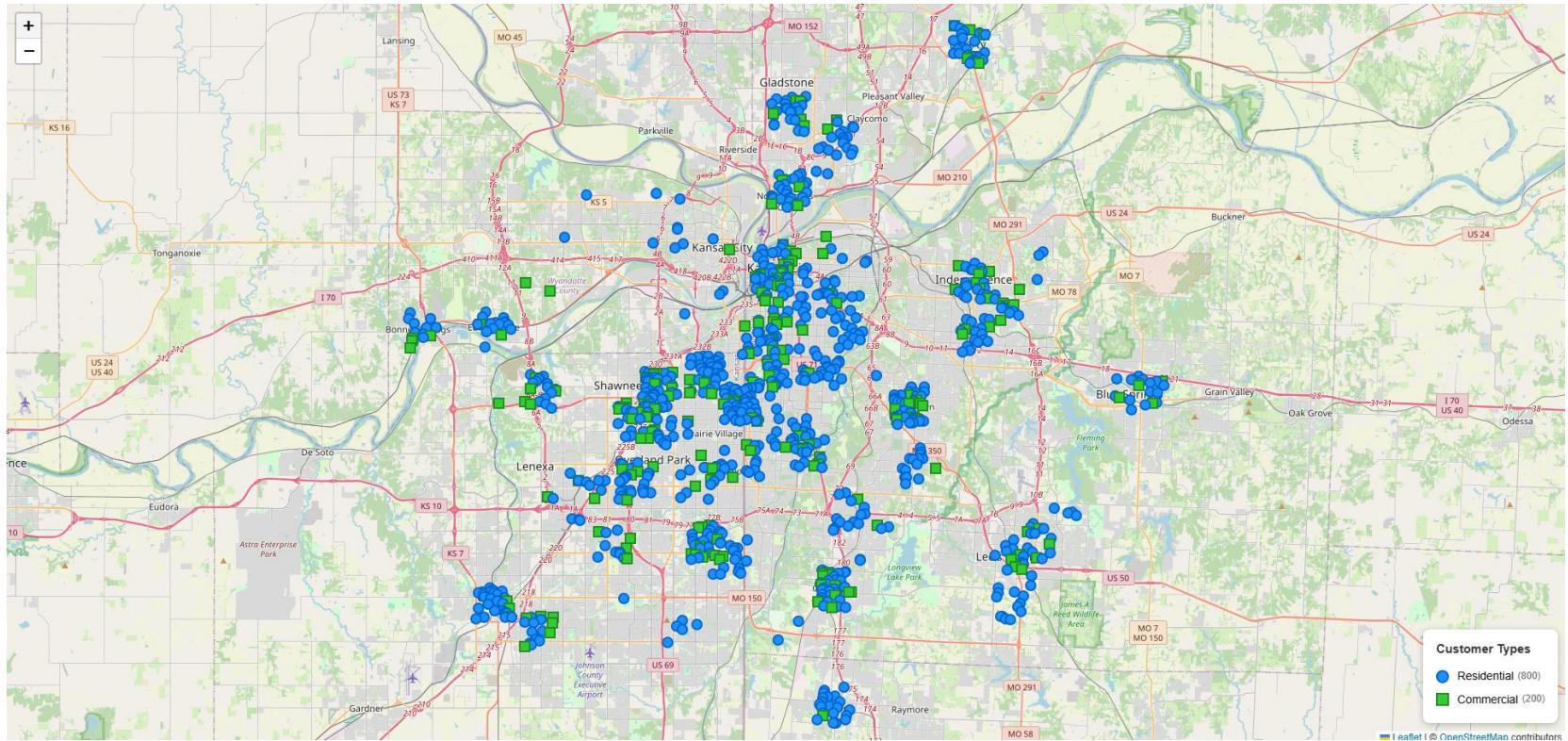
Account Number	Customer Name	Street Address	City	State	ZIP	Customer Type	Service Level	Billing Cycle	Billing Rate	Billing Cycle Date	Current Balance
000202PG	Ronald Castillo	7127 Cleveland Pkwy	Leawood	KS	66206	Residential	Premium + Sports	Monthly	\$308.29	15th of Month	0
000202YR	Ethan Richardson	583 Washington Way	Kansas City	MO	64116	Residential	Basic + Internet	Monthly	\$147.50	15th of Month	0
000427PA	Charles Fisher	7499 McGee St	Kansas City	MO	64130	Residential	Premium	Monthly	\$224.48	1st of Month	673.44
000589FT	Donna Richardson	7760 Linwood Ln	Overland Park	KS	66210	Residential	Basic + Internet	Monthly	\$147.50	15th of Month	0
000749DH	Ashley Young	6470 Troost St	Blue Springs	MO	64015	Residential	Premium	Monthly	\$224.48	1st of Month	224.48
000946SR	Cormac Tremont	6344 State Line Rd	Mission Hills	KS	66208	Residential	Premium	Monthly	\$224.48	15th of Month	\$0.00
001551UJ	Scott Gonzalez	1871 51st St	Olathe	KS	66062	Residential	Premium	Monthly	\$224.48	Last Day of Month	0
001715LW	Karen Howard	7743 Lydia Pkwy	North Kansas City	MO	64116	Residential	Premium + Sports	Monthly	\$308.29	Last Day of Month	0
001969KQ	Justin Collins	8567 E 89th St	Kansas City	MO	64138	Residential	Premium + Sports	Monthly	\$308.29	15th of Month	\$0.00
002019XT	Joshua Davis	5332 51st Pkwy Apt 823	Gladstone	MO	64118	Residential	Basic	Monthly	\$83.70	15th of Month	83.7
002040HZ	Dennis Rogers	5157 Antioch Way	Shawnee	KS	66226	Residential	Basic + Internet	Monthly	\$147.50	Last Day of Month	0
002332SR	Carolyn Kelly	3453 75th Ct	Lenexa	KS	66285	Residential	Basic + Internet	Monthly	\$147.50	Last Day of Month	0
002466DY	Quantum Medical Group	444 Kaw Dr	Edwardsville	KS	66113	Business	Commercial Internet + Basic	Quarterly	\$473.67	1st of Quarter	\$473.67
002516NE	Joseph Ramirez	8850 Indiana Ave	Shawnee	KS	66216	Residential	Basic + Internet	Monthly	\$147.50	15th of Month	0
002694SC	Helen Barnes	4992 Cleveland St	Shawnee	KS	66226	Residential	Basic	Monthly	\$83.70	1st of Month	83.7
002736XH	Olivia Ramos	4174 Westport Ave	Lee's Summit	MO	64065	Residential	Basic + Internet	Monthly	\$147.50	Last Day of Month	442.5
002862CR	Daniel Kelly	9712 Prospect Ave	Lee's Summit	MO	64065	Residential	Premium	Monthly	\$224.48	1st of Month	0
003832FB	Heather Thomas	1925 Metcalf Ln	Raytown	MO	64133	Residential	Basic + Internet	Monthly	\$147.50	1st of Month	0
003888YE	Fabian Fitzroy	11365 Nall Ave	Overland Park	KS	66207	Residential	Premium	Monthly	\$224.48	15th of Month	\$0.00
004082IA	Sarah Carter	2884 95th Pkwy	Kansas City	MO	64123	Residential	Premium + Sports	Monthly	\$308.29	15th of Month	1233.16
004516XB	Brenda Richardson	7232 Maple Ln	Prairie Village	KS	66224	Residential	Premium + Sports	Monthly	\$308.29	1st of Month	0
004583NJ	Joseph Davis	4747 95th Dr	Leawood	KS	66211	Residential	Basic + Internet	Monthly	\$147.50	Last Day of Month	442.5
004917XZ	Aaron Barnes	5987 75th Ln	Raytown	MO	64138	Residential	Premium + Sports	Monthly	\$308.29	15th of Month	0
004922DP	Christopher Evans	6885 Red Bridge Way	Blue Springs	MO	64013	Residential	Premium	Monthly	\$224.48	1st of Month	673.44
004933XU	Michael Ward	6193 State Line Pkwy	Grandview	MO	64030	Residential	Premium	Monthly	\$224.48	1st of Month	673.44
004983AI	Lisa Roberts	5545 Cherry Pl Apt 541	Liberty	MO	64065	Residential	Basic + Internet	Monthly	\$147.50	1st of Month	442.5
005892CR	Christina Henderson	1112 Benton Way	Raytown	MO	64133	Residential	Premium	Monthly	\$224.48	1st of Month	0
006340XD	Kathleen Rogers	835 Prospect Blvd	Lee's Summit	MO	64064	Residential	Basic + Internet	Monthly	\$147.50	Last Day of Month	590
006568NB	Susan Carter	7683 College Ter	Lenexa	KS	66215	Residential	Basic + Internet	Monthly	\$147.50	15th of Month	0
006650PG	Silas Tremont	6694 N Prospect Ave	Gladstone	MO	64119	Residential	Premium + Sports	Monthly	\$308.29	15th of Month	\$0.00
006916EL	Andrew Martin	7789 Nieman Rd	Shawnee	KS	66203	Residential	Premium + Sports	Monthly	\$308.29	15th of Month	\$0.00
007203ZP	Julie Powell	9405 Elm Ter	Grandview	MO	64030	Residential	Basic	Monthly	\$83.70	1st of Month	167.4
007236NA	Andrew Castillo	3631 Ward Parkway Ave	Shawnee	KS	66203	Residential	Basic	Monthly	\$83.70	Last Day of Month	334.8
007264LI	Shirley Richardson	107 Johnson Drive Ct Apt 636	Belton	MO	64012	Residential	Premium + Sports	Monthly	\$308.29	1st of Month	0
007406MM	Alexander Rogers	1755 Kansas St	Belton	MO	64012	Residential	Basic + Internet	Monthly	\$147.50	15th of Month	0
007454SG	Alaric Ravencroft	8939 Nall Ave	Prairie Village	KS	66208	Residential	Premium + Sports	Monthly	\$308.29	15th of Month	924.87
007510MM	Adam Nguyen	7043 Antioch Blvd	Olathe	KS	66063	Residential	Premium + Sports	Monthly	\$308.29	15th of Month	924.87
007625NE	Alexander Price	8314 31st Pl Suite 754	Raytown	MO	64138	Residential	Premium + Sports	Monthly	\$308.29	1st of Month	1233.16
007780RQ	David Ortiz	7411 Sterling Dr	Grandview	MO	64030	Residential	Basic	Monthly	\$83.70	1st of Month	0
008244GK	James Evans	9749 Benton Ct	Lee's Summit	MO	64086	Residential	Premium + Sports	Monthly	\$308.29	1st of Month	0
008547CY	Tyler Cooper	5981 Rainbow St	North Kansas City	MO	64116	Residential	Basic	Monthly	\$83.70	Last Day of Month	0
008613JK	Sandra Stewart	7059 Woodland Pkwy Apt 282	Independence	MO	64052	Residential	Premium + Sports	Monthly	\$308.29	15th of Month	0
008628BM	Laura Price	9040 Holmes Rd	Overland Park	KS	66213	Residential	Basic + Internet	Monthly	\$147.50	1st of Month	0
008796YJ	Melissa Gonzalez	9147 Oak Dr	Raytown	MO	64133	Residential	Premium	Monthly	\$224.48	Last Day of Month	0
008910WT	Brenda Coleman	4637 Main Pkwy Suite 697	Leawood	KS	66209	Residential	Premium	Monthly	\$224.48	1st of Month	0
008913XF	Indira Osgood	326 Cambridge St	Belton	MO	64012	Residential	Basic + Internet	Monthly	\$147.50	15th of Month	0

The first available Metro Cable dataset is Customer Account Data. The team can conduct preliminary analysis on this data to gain insights while other datasets are being compiled.

Phase 1: Diagnosis | Data Analysis: "Visualization" - example

Prompt:

Using the attached file, plot the location of customers on a daylight version map of the Kansas City metropolitan area that includes streets. Each residential customer must be indicated with a small blue circle. Each commercial customer must be indicated with a small green square. Symbols (circles and squares) should be high-contrast relative to the map background.



Using **AI enabled analysis tools**, the Team can quickly plot customer locations on a map of the service area - in the past, such analysis would have required specialized mapping tools and significant effort on the part of the team.

Data Visualization

- A good early analysis is to make the data visual.
- Having data in a visual format can help teams understand key dynamics of the operations that might not be readily apparent in the dataset.
- *In this case, the Team is interested in understanding the geographic distribution of Metro Cable customers.*
- These insights may prove valuable in future analysis.

[KC Customer Map.html](#)



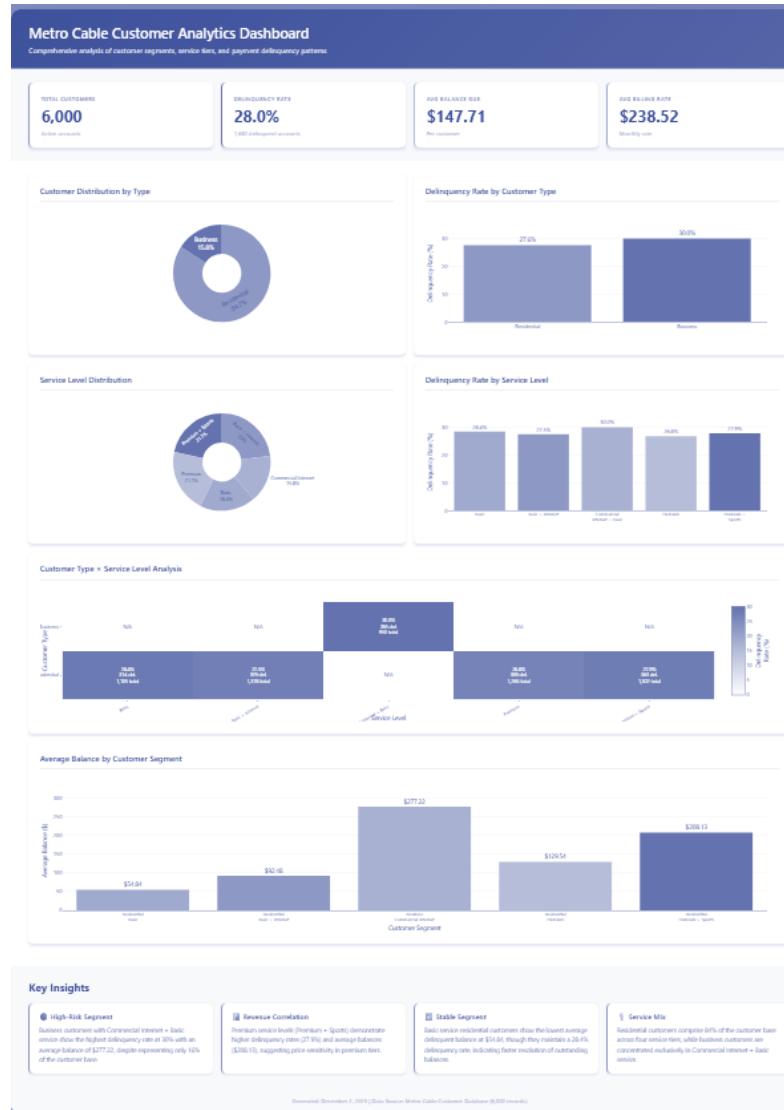
Phase 1: Diagnosis | Data Analysis: “Visualization” - example

Prompt:

Provide a graphical summary of any relevant relationships between Customer Type, Service Level, and Payment Delinquency

Data Visualization

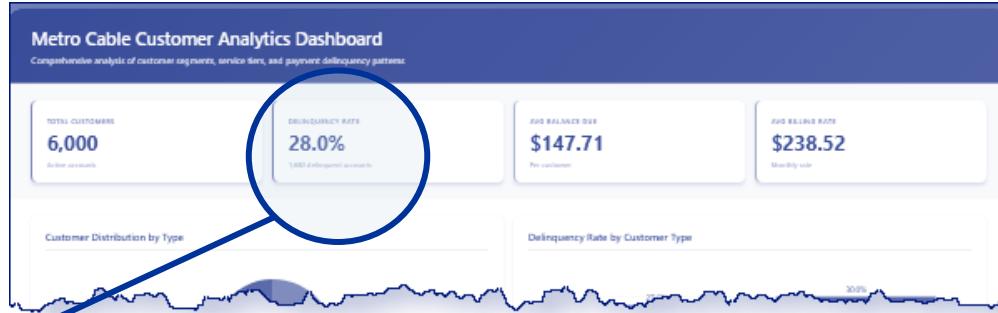
- AI enabled analysis can be thought of as **“curiosity enabled analysis”** using AI tools.
- Traditionally, due to the length of time required to complete manual data analysis, teams would prioritize which areas to address.
- Labor intensive manual data analysis often meant the team was time-constrained and unable to fully interrogate the data.
- In this case, the team seeks to understand more about late and delinquent customer accounts. Using a simple prompt, the team can expose any potential relationships between customer type, or service level and account delinquency.
- Note:** Even when the AI enabled data analysis doesn't show a significant relationship, this type of quick analysis can be used to narrow the focus of subsequent analysis.



Important: AI tools can make mistakes. Entering the same prompt into multiple AI tools or prompting a second AI tool to validate the output of the first tool can help reduce risks. Always validate key facts before using the AI output for critical decision making.



Phase 1: Diagnosis | Data Analysis: "Curiosity Analysis" - example



One statistic in the previous Customer Payment Analysis stood out to the team and initiated a follow-up AI enabled analysis prompt.

Prompt:

What is the average customer monthly delinquency rate for public utilities and how does the Metro Cable delinquency average compare to monthly delinquency rates of cable and internet providers.

- Results from the AI Analysis suggest that Metro Cable's delinquency rate is slightly better than the average for cable and internet providers.
- While this high-level analysis didn't reveal an anomaly, the team will make a note of delinquency rate and look for cross-connections throughout subsequent analysis.

Important: AI tools can make mistakes. Entering the same prompt into multiple AI tools or prompting a second AI tool to validate the output of the first tool can help reduce risks. Always validate key facts before using the AI output for critical decision making.



Phase 1: Diagnosis | Data Analysis - example

The next data the team receives is from Human Resources and the Finance Department:

- List of all employees with labor rates
- Current month P&L with forecast and year-to-date details

The team can conduct additional “curiosity analysis” while waiting for the data from the customer service team.

Employee #	First Name	Last Name	Street Address	City	State	Postal Code	Birth Date	Hire Date	Position	Hourly Rate
19091001	Steve	Johnson	2847 Independence Ave	Independence	MO	64052	Feb-14-1969	Jun-03-1991	Technician	\$41.00
19121001	Richard	Morrison	4201 Verona Rd	Mission Hills	KS	66208	May-18-1972	Mar-15-2011	General Manager	\$64.62
19127001	Raymond	Kowalski	3421 E 39th St	Kansas City	MO	66128	Jun-30-1979	Apr-15-2012	Major Maintenance Tech	\$37.94
19141003	Linda	Nakamura	6520 Blue Ave	Prairie Village	KS	66208	Nov-27-1975	Jan-06-2014	Office Manager	\$34.38
19151002	Patricia	Kowalski	8742 Blue Heron Ln	Leawood	KS	66206	Sep-03-1978	Jul-20-2015	Sales Manager	\$44.13
19157002	Carlos	Gutierrez	7856 W 75th St	Overland Park	KS	66204	Feb-18-1983	Aug-24-2015	Major Maintenance Tech	\$37.29
19161004	Marcus	Chen	3847 W 83rd St	Prairie Village	KS	66206	Feb-14-1980	Sep-12-2016	Service Manager	\$38.22
19163001	Nancy	Bergstrom	4521 NE Antioch Rd	Kansas City	MO	64119	Oct-05-1982	Mar-21-2016	Billing / Accounting	\$24.18
19172005	Emily	Washington	12450 Quivira Rd	Overland Park	KS	66213	Aug-11-1987	Nov-13-2017	Salesperson	\$32.41
19174001	Angela	Kozlov	2345 Liberty Dr	Liberty	MO	64068	Jul-14-1984	Jun-05-2017	Dispatcher	\$26.32
19177003	Terrance	Mitchell	2345 Blue Ridge Blvd	Independence	MO	64052	Oct-07-1985	Dec-04-2017	Major Maintenance Tech	\$40.10
19182001	Jennifer	Blackwood	5234 Brookside Blvd	Kansas City	MO	64112	Apr-22-1985	May-14-2016	Salesperson	\$32.13
19183004	William	Johansson	3421 N Brighton Ave	Kansas City	MO	64117	Aug-12-1986	Apr-02-2018	Billing / Accounting	\$24.48
19186001	Gregory	Yates	4521 Sterling Ave	Raytown	MO	64133	Aug-22-1987	Oct-08-2016	Inventory Specialist	\$25.44
19192003	Sarah	Fitzgerald	7823 Wornall Rd	Kansas City	MO	64114	Dec-15-1988	Aug-26-2019	Salesperson	\$31.08
19193002	Robert	Tran	7234 Johnson Dr	Shawnee	KS	66203	May-19-1989	Jul-08-2019	Billing / Accounting	\$24.94
19194004	Stephanie	Burke	4567 E 23rd St	Independence	MO	64055	Apr-21-1988	Sep-23-2019	Dispatcher	\$27.87
19197004	Jeffrey	Park	5432 Shawnee Mission Pk	Shawnee	KS	66205	Mar-23-1988	Jun-17-2019	Major Maintenance Tech	\$37.93
19202002	David	Okonkwo	9156 Antioch Rd	Overland Park	KS	66212	Jul-08-1990	Feb-03-2020	Salesperson	\$30.36
19204002	Daniel	Nguyen	6789 N Oak Trafficway	Gladstone	MO	64118	Dec-03-1990	Mar-16-2020	Dispatcher	\$26.75
19212004	Michael	Ramirez	4521 W 1st St	Prairie Village	KS	66208	Mar-30-1992	Apr-05-2021	Salesperson	\$28.05
19213003	Michelle	Orozco	5678 E 87th St	Raytown	MO	64138	Feb-28-1993	Nov-15-2021	Billing / Accounting	\$21.76
19215003	Ashley	Rivera	2134 S 38th St	Kansas City	KS	66106	Jun-09-1994	Feb-22-2021	Customer Service Rep	\$18.56
19216002	Melissa	Andersen	6789 Pfleum Rd	Lenexa	KS	66215	Apr-05-1991	Jul-12-2021	Inventory Specialist	\$22.95
19222006	James	Patel	6234 Walnut St	Kansas City	MO	64113	Jan-25-1994	Jun-20-2022	Salesperson	\$29.36
19224004	Christopher	Santos	8234 Metcalf Ave	Overland Park	KS	66212	Sep-08-1992	Jan-10-2022	Dispatcher	\$25.11
19225001	Jessica	Harper	3456 Troost Ave	Kansas City	MO	64109	Mar-17-1996	Aug-01-2022	Customer Service Rep	\$17.50
19227005	Antoine	Williams	8901 N Woodland Ave	Kansas City	MO	64155	Sep-11-1990	Mar-07-2022	Major Maintenance Tech	\$33.57
19232007	Amanda	Kowalczyk	8901 Lamar Ave	Lenexa	KS	66215	Jun-07-1991	Jan-09-2023	Salesperson	\$29.98
19233005	Christina	Mbeki	9012 W 95th St	Overland Park	KS	66212	Nov-30-1995	May-22-2023	Billing / Accounting	\$22.85
19235002	Brandon	Kim	7890 E Truman Rd	Independence	MO	64050	Nov-25-1998	Apr-17-2023	Customer Service Rep	\$18.16
19245004	Tyler	O'Brien	5678 NE Parvin Rd	Kansas City	MO	64117	Jan-14-1999	Jun-08-2024	Customer Service Rep	\$15.31
19318042	Alan	Anderson	8234 Wornall Rd	Kansas City	MO	64114	Jul-15-1998	Sep-11-2017	Technician	\$31.00
19319078	Carta	Cranfield	7892 Metcalf Ave	Overland Park	KS	66212	Aug-30-1990	Sep-16-2019	Technician	\$29.80
19322067	Mike	Hendricks	5678 State Line Rd	Leawood	KS	66206	Jun-03-1992	Sep-19-2022	Technician	\$27.90
19327045	Kevin	Thompson	6473 Overhill Rd	Mission Hills	KS	66208	Mar-27-1994	Jun-01-2017	Technician	\$31.00
19421089	Barbra	Bedford	4521 Rainbow Blvd	Kansas City	KS	66103	Apr-08-1991	Oct-18-2021	Technician	\$28.75
19423156	Allison	Harris	1542 E 63rd St	Kansas City	MO	64110	Nov-22-1997	Sep-05-2023	Technician	\$26.50
19524033	Derrick	Donald	3156 N Oak Trafficway	Kansas City	MO	64116	Jan-17-1993	Mar-11-2024	Technician	\$25.20

[Metro Cable Employees.xlsx](#)

METRO CABLE												
Profit and Loss Statement												
For the Month Ended November 30, 2025												
Category	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sep-25	Oct-25	Nov-25	Dec-25 (Fcst)
Total Revenue	\$1,131,100	\$1,131,100	\$1,131,100	\$1,131,100	\$1,131,100	\$870,947	\$870,947	\$870,947	\$957,664	\$1,044,382	\$1,131,100	\$1,131,100
Cost of Services												YTD 2025
Network Ops & Prog	\$397,917	\$397,917	\$397,917	\$397,917	\$397,917	\$306,396	\$306,396	\$306,396	\$336,903	\$367,410	\$397,917	\$397,917
Service Tech Labor	\$85,445	\$85,445	\$85,445	\$85,445	\$85,445	\$85,445	\$85,445	\$85,445	\$85,445	\$85,445	\$85,445	\$939,893
Payroll Taxes (COGS)	\$25,633	\$25,633	\$25,633	\$25,633	\$25,633	\$25,633	\$25,633	\$25,633	\$25,633	\$25,633	\$25,633	\$281,968
Gross Profit	**\$622,105**	\$622,105	\$622,105	\$622,105	\$622,105	\$453,473	\$453,473	\$453,473	\$509,683	\$565,894	\$622,105	\$6,168,625
Operating Expenses												
Sales & Admin Labor	\$100,936	\$100,936	\$100,936	\$100,936	\$100,936	\$100,936	\$100,936	\$100,936	\$100,936	\$100,936	\$100,936	\$1,110,296
Payroll Taxes (SG&A)	\$30,281	\$30,281	\$30,281	\$30,281	\$30,281	\$30,281	\$30,281	\$30,281	\$30,281	\$30,281	\$30,281	\$333,089
Marketing & Adv	\$45,244	\$45,244	\$45,244	\$45,244	\$45,244	\$34,838	\$34,838	\$34,838	\$38,307	\$41,775	\$45,244	\$45,244
Rent & Utilities	\$22,622	\$22,622	\$22,622	\$22,622	\$22,622	\$22,622	\$22,622	\$22,622	\$22,622	\$22,622	\$22,622	\$22,622
Vehicle & Equip Maint	\$18,098	\$18,098	\$18,098	\$18,663	\$19,229	\$19,794	\$20,360	\$20,925	\$21,491	\$22,056	\$22,622	\$22,622
Other General & Admin	\$45,244	\$45,244	\$45,244	\$45,244	\$45,244	\$34,838	\$34,838	\$34,838	\$38,307	\$41,775	\$45,244	\$45,244
EBITDA	**\$359,681**	\$359,681	\$359,681	\$359,115	\$358,549	\$210,164	\$209,598	\$209,033	\$257,741	\$306,448	\$355,156	\$3,344,846
Depreciation	\$169,665	\$169,665	\$169,665	\$169,665	\$169,665	\$169,665	\$169,665	\$169,665	\$169,665	\$169,665	\$169,665	\$1,866,315
EBIT	**\$190,016**	\$190,016	\$190,016	\$189,450	\$188,884	\$40,499	\$39,933	\$39,368	\$88,076	\$136,783	\$185,491	\$185,491
Interest Exp	\$33,933	\$33,933	\$33,933	\$33,933	\$33,933	\$33,933	\$33,933	\$33,933	\$33,933	\$33,933	\$33,933	\$33,933
Net Income	**\$117,062**	\$117,062	\$117,062	\$116,638	\$116,214	\$4,925	\$4,500	\$4,076	\$40,607	\$77,138	\$113,669	\$828,951

[Metro_Cable_PL_Nov2025.xlsx](#)



Phase 1: Diagnosis | Data Analysis - example

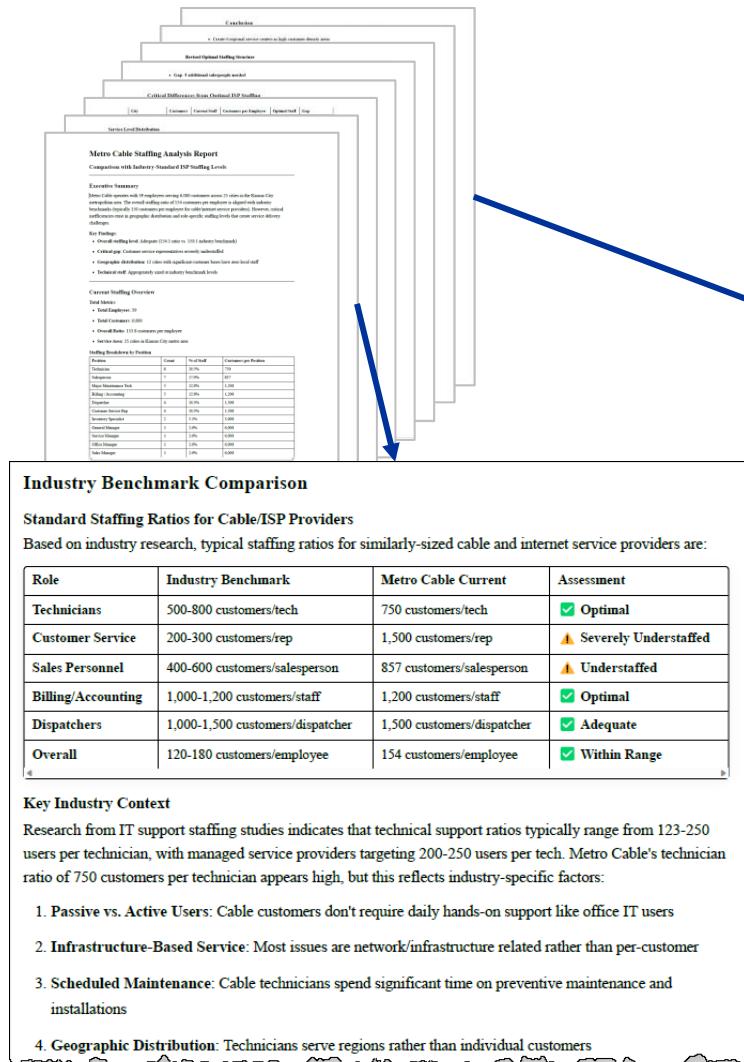
Prompt:

Analyze the attached files to determine if Metro Cable staffing is consistent with similarly sized cable and internet service providers. Summarize the similarities and differences between Metro Cable staffing and optimal staffing given the geographic distribution of customers

- A simple prompt to review Customer and Employee data produces an eight-page report
- This report suggests that Metro Cable has a reasonable level of staffing with shortfalls in a couple areas
- The report also offers some insights that the team can pursue as they further their problem-solving efforts

CAUTION!

- Analysis produced by AI tools can change significantly from session to session in both format and details
- Likewise, the analysis can change based on the data supplied (see next slide)
- Team should **always validate** results before rendering final determinations



Conclusion

Metro Cable's overall staffing level is appropriate for its customer base, but critical inefficiencies exist in role distribution and geographic allocation. The company operates at 154 customers per employee, which matches industry standards, but faces two major challenges:

Similarities to Industry Standards:

1. Appropriate total headcount for customer base size
2. Well-staffed technical and maintenance teams
3. Adequate billing and dispatch operations
4. Proper management structure

Critical Differences Requiring Action:

1. Customer service is understaffed by 80% (needs 16 additional CSRs)
2. Geographic distribution creates 30-40% process inefficiency (needs regional restructuring)
3. Sales capacity limits growth potential (needs 5 additional sales staff)

The recommended staffing increase from 39 to 69 employees represents a significant investment (~\$840,000 annually) but addresses fundamental process inefficiencies that cost the company far more in:

- Lost customers (churn)
- Reduced employee productivity (travel waste)
- Missed revenue opportunities (inadequate sales coverage)
- Damage to brand reputation (poor customer service)

Priority Recommendation: Focus first on customer service staffing (16 CSRs) and geographic redistribution (6 regional placements). These changes will yield the highest immediate return on investment through improved customer retention and operational efficiency.

[Metro_Cable_Staffing_Analysis_1.pdf](#)



Phase 1: Diagnosis | Data Analysis - example

Prompt:

Analyze the attached files to determine if Metro Cable staffing is consistent with similarly sized cable and internet service providers. Summarize the similarities and differences between Metro Cable staffing and optimal staffing given the geographic distribution of customers

- Using the exact same prompt but adding the P&L file to the analysis conducted by the AI tool produces dramatically different results
- This report suggests the Metro Cable is overstaffed compared to industry standards while the previous report suggested understaffing
- Teams must use caution in reviewing and making recommendation based a single analysis generated by AI tools
- Teams should **validate results** and use care to provide the AI tool with data relevant to the question being asked - in this case P&L data may not be directly pertinent to the question regarding staffing levels

Key Findings:

- Overall Staffing:** 6.5 employees per 1,000 customers vs. industry benchmark of 5.8
- Field Technicians:** Potentially overstaffed by 35-40% based on estimated service demand
- Geographic Challenge:** Dispersed service area across 26 cities creates operational inefficiencies
- Customer Base:** 84.2% residential, 15.8% business customers

Optimal Staffing Model Recommendation

Recommended Staff Structure (Target)

Function	Current	Optimal	Change	Rationale
Technical Field Staff				
Standard Technicians	8	5	-3	Match service demand at 75% utilization
Major Maintenance Techs	5	4	-1	Proportional reduction
Service/Support				
Service Manager	1	1	0	Maintain
Dispatchers	4	3	-1	Automation and optimization
Customer Service Reps	4	5	+1	Handle tier-1 technical calls
Sales & Marketing				
Sales Manager	1	1	0	Maintain
Salespeople	7	7	0	Appropriate for growth focus
Administration				
General Manager	1	1	0	Maintain
Office Manager	1	1	0	Maintain
Billing/Accounting	5	5	0	Maintain
Inventory Specialist	2	2	0	Maintain
TOTAL	39	35	-4	

Conclusion

Summary of Findings

Metro Cable's staffing of 39 employees serving 6,000 customers places it **above current industry benchmarks** but within historical norms. The company is approximately:

- 12% overstaffed compared to 2024 industry standards
- 7% understaffed compared to 2016-2021 historical averages

Primary Issues:

- Technical field staff is 35-40% overstaffed based on estimated service demand (current utilization ~47%)
- Geographic dispersion across 26 cities creates inherent inefficiencies requiring more staff than customer volume alone would justify
- Limited adoption of modern efficiency tools (self-service, remote diagnostics) compared to industry leaders



Phase 1: Diagnosis | Data Analysis: "Validation" - example

Teams should never rely on a singular AI tool analysis for key determinations or recommendations. Ultimately, applying human intelligence and experience across **multiple analyzes** will increase overall accuracy of interpretations.

Validation Methods:

- Multiple runs of the same prompt and data in the same AI tool in **separate sessions**
- Slight alterations to the prompt in a **secondary run** of the same data in the same AI tool
- Running the same prompt and data set in **different AI tools** and comparing results
- Cross validation of results** between AI tools

Why results differ...

- AI analysis reflects a point-in-time snapshot influenced by the model's training method and available data.**
 - As datasets expand, analyses using newer or broader reference data may yield different results
 - More importantly, LLM outputs are inherently probabilistic, meaning results can vary even with the same inputs
- Example:** Industry averages will change based on the number of years of historical data considered OR the same AI prompt may generate slightly different insights or recommendations each time it is run due to probabilistic modeling
- Note:** Running a second analysis in the same session (chat) will incorporate all data provided in that chat (i.e., a second analysis in a chat that previous considered the P&L data will incorporate those insights in subsequent analysis unless prompted otherwise)

AI tool 1- 1st Result

Appropriately staffed

AI tool 1- 2nd Result

Overstaffed

AI tool 2- 1st Result

Right-sized

Conclusion

Metro Cable's overall staffing level is appropriate for its customer base, but **critical inefficiencies exist in role distribution and geographic allocation**. The company operates at 154 customers per employee, which matches industry standards, but faces two major challenges:

Similarities to Industry Standards:

- Appropriate total headcount for customer base size
- Well-staffed technical and maintenance teams

Bottom Line

Metro Cable's staffing is:

- 12% above current (2024) industry efficiency standards
- 7% below historical (2021) industry averages
- Significantly overstaffed in field technical positions (35-40% excess capacity)
- Appropriately staffed in support functions (sales, billing, customer service)

The primary driver of overstaffing is **technical field staff**, where current capacity (40.5 jobs/day) far exceeds estimated demand (19.1 jobs/day), resulting in only 47% utilization.

Executive Summary

Metro Cable's staffing analysis reveals that while the overall headcount is consistent with industry standards for a provider of its size, there are significant inefficiencies in role allocation and geographic deployment. The company is currently well-positioned in terms of total labor force but requires strategic adjustments to optimize service delivery and reduce operational costs.

1. Staffing Level Consistency

The analysis confirms that Metro Cable is "Right-Sized" relative to its customer base.

Industry Benchmark: 5.8 to 8.0 employees per 1,000 customers.

Metro Cable Metric: 6.5 employees per 1,000 customers (39 employees for ~6,000 customers).

Conclusion: The total headcount is optimal. No immediate mass hiring or downsizing is required based on total volume.

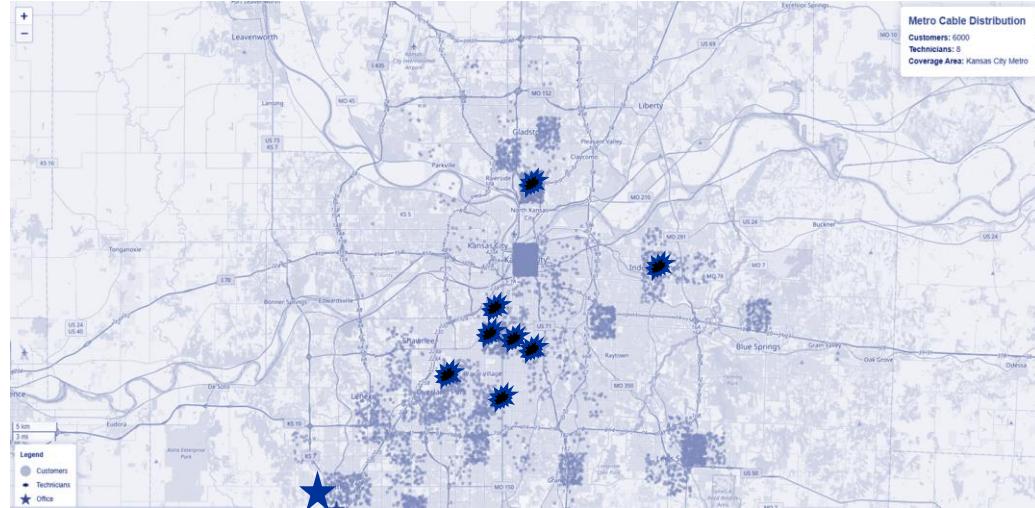
Phase 1: Diagnosis | Data Analysis: "Follow-up" - example

The team notices that all three Staffing analyses, mention the potential of inefficiencies regarding Technicians.

- 1** To get a sense of how Technicians home addresses related to the Metro Cable office the team uses AI Tools to create a simple visualization.

Prompt:

Using the Metro Cable Customer file, produce a visualization of how Metro Cable customers are distributed on a daylight version map (with streets identified) of the Kansas City Metropolitan area. Using the Metro Cable Employee file plot the location on each Technician's home address with a black diamond. Then plot the location of the Metro Cable office located at 1290 S. Enterprise Drive, Olathe, KS with a large red star symbol. Produce the final visualization in an HTML format.



- 2** To get a deeper level of understanding, the team uses AI Tools to calculate "distance from the office" and travel times for each Technician.

Prompt:

Using the attached Metro Cable Employee file calculate the distance between each Technician's home address and the Metro Cable offices located at 1290 S. Enterprise Drive, Olathe, KS. Also, provide estimated drive times for each Technician given average weekday traffic flows in the Kansas City metropolitan area. Present output in an MS-Excel table.

Employee #	First Name	Last Name	Home Address	City	State	Postal Code	Distance to Office (miles)	Est. Drive Time (minutes)
19319078	Carla	Cranfield	7892 Metcalf Ave	Overland Park	KS	66212	11.61	23.4
19322067	Mike	Hendricks	5678 State Line Rd	Leawood	KS	66206	11.82	23.8
19327045	Kevin	Thompson	6473 Overhill Rd	Mission Hills	KS	66208	12.98	26.1
19318042	Alan	Anderson	8234 Wornall Rd	Kansas City	MO	64114	16.92	30.4
19423156	Allison	Harris	1542 E 63rd St	Kansas City	MO	64110	17.99	32
19421089	Barbra	Bedford	4521 Rainbow Blvd	Kansas City	KS	66103	20.1	35.2
19524033	Derrick	Donald	3156 N Oak Trafficway	Kansas City	MO	64116	23.65	40.5
19091001	Steve	Johnson	2847 Independence Ave	Independence	MO	64052	28.56	47.8

SUMMARY: 17.95 32.4

Notes:

- Office Location: 1290 S. Enterprise Drive, Olathe, KS 66062
- Drive times estimated for average weekday traffic conditions in Kansas City metro area
- Distances calculated as straight-line (Haversine) distances; actual driving distances may vary

Based on this initial analysis, the team notices that on average, Technicians are spending an hour of personal time getting to and from work each day.

Phase 2: Prioritization | WSJF

Weighted Shortest Job First (WSJF) prioritization methodology from SAFe (Scaled Agile Framework) is an industry-standard approach for balancing business value, time criticality, risk reduction, and implementation effort to maximize customer value delivery and speed.

BUSINESS VALUE

Customer/Business Benefit

- 9-10:** Transformational impact on customer experience, revenue, or competitive position
- 7-8:** Significant measurable impact on KPIs, cost reduction 25%+, or customer satisfaction
- 5-6:** Moderate impact, measurable efficiency gains 10-25%, improved analytics
- 3-4:** Small incremental improvement, limited scope impact
- 1-2:** Minimal impact, nice-to-have capability

RISK REDUCTION & OPPORTUNITY ENABLEMENT

Strategic Value

- 9-10:** Eliminates major regulatory/compliance risk OR enables multiple future use cases
- 7-8:** Reduces operational risk OR unlocks new business models/products
- 5-6:** Moderate risk mitigation OR enables 2-3 future capabilities
- 3-4:** Minor risk reduction OR enables 1 future capability
- 1-2:** Minimal risk impact, standalone capability



TIME CRITICALITY

Urgency

- 9-10:** Regulatory deadline, critical competitive disadvantage, market window closing
- 7-8:** Significant opportunity cost if delayed, business strategy dependency
- 5-6:** Moderate urgency, aligned with annual planning cycle
- 3-4:** Low urgency, flexible timeline
- 1-2:** No time pressure, can be delayed indefinitely

JOB SIZE

Implementation Effort

- 9-10:** >12 months, major platform changes, high complexity, large team
- 7-8:** 6-12 months, significant technical challenges, multiple dependencies
- 5-6:** 3-6 months, moderate complexity, some dependencies
- 3-4:** 1-3 months, low complexity, minimal dependencies
- 1-2:** <1 month, simple implementation, no dependencies

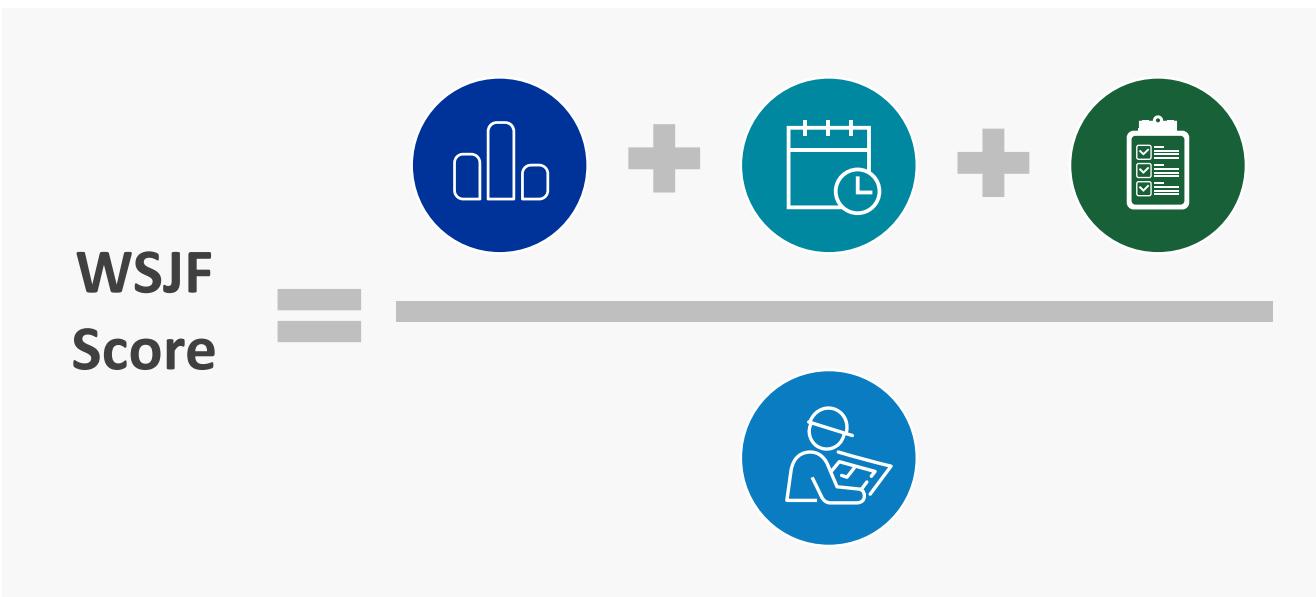
Phase 2: Prioritization | WSJF (cont.)

Higher WSJF scores indicate higher priority. This ensures high-value, time-sensitive opportunities that enable future capabilities are delivered first, even if they require more effort than simpler initiatives.



WSJF Score = Cost of Delay (CoD) ÷ Job Size

Cost of Delay (CoD) = Business Value + Time Criticality + Risk Reduction & Opportunity Enablement



Phase 2: Prioritization | WSJF - example

Higher WSJF scores indicate higher priority. This ensures high-value, time-sensitive opportunities that enable future capabilities are delivered first, even if they require more effort than simpler initiatives.

1

Cost of Delay (CoD) = Business Value + Time Criticality + Risk Reduction & Opportunity Enablement

2

WSJF Score = Cost of Delay (CoD) ÷ Job Size



WSJF Score



2

$$\text{CoD} / \text{Job Size} = \text{WSJF}$$

Opportunities with higher WSJF scores rank higher priority.

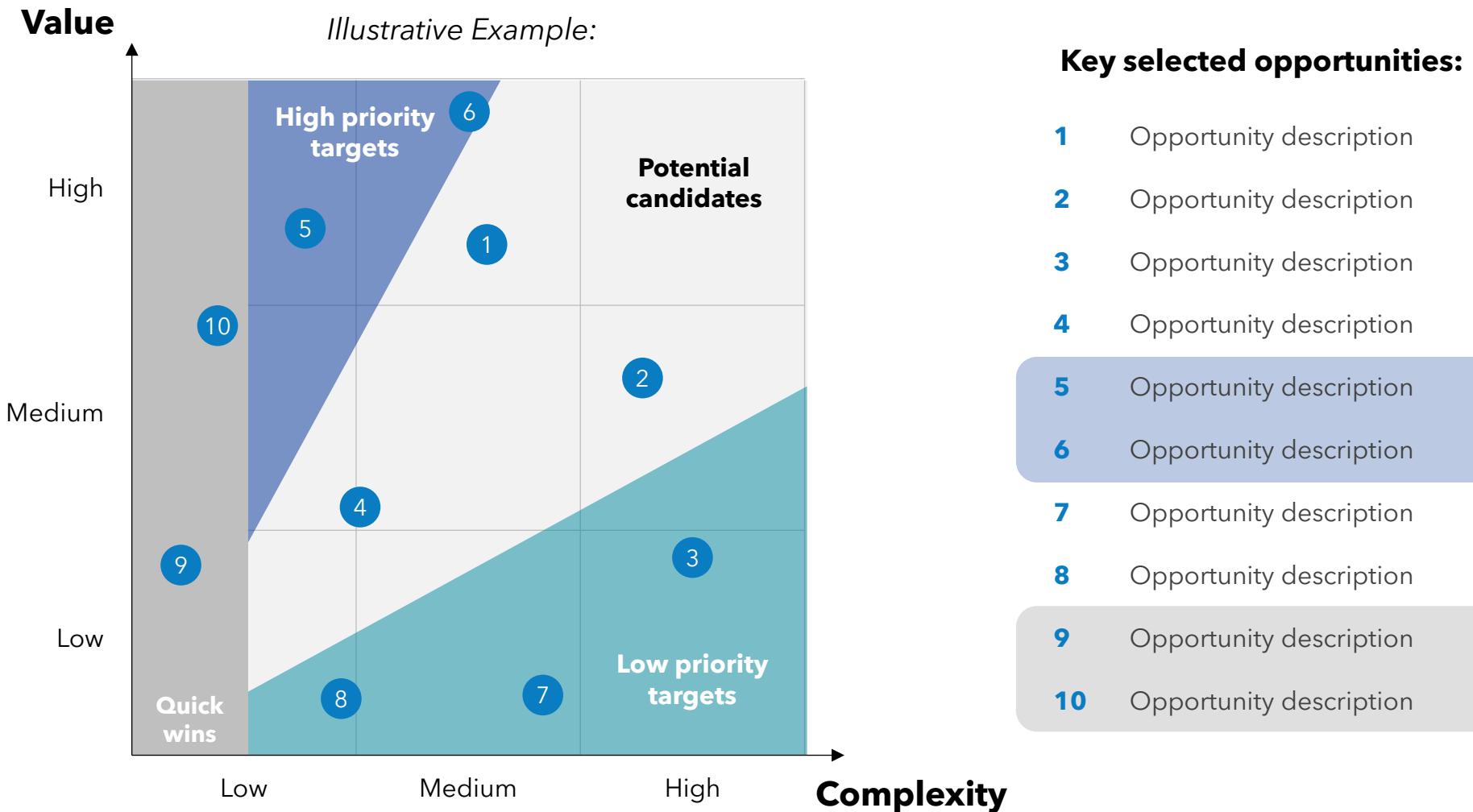
ID	Opportunity Name	SCORING INPUTS (1-10)			CALCULATED OUTPUTS			
		Business Value (1-10)	Time Criticality (1-10)	Risk Reduction/Opportunity (1-10)	Job Size (1-10)	Cost of Delay (CoD)	WSJF Score (CoD ÷ Size)	Priority Ranking
1	AI-Based Installation Appointment Optimization	9	9	8	6	26	4.33	3 Medium
2	Real-Time Technician ETA Visibility for Customers	8	9	6	4	23	5.75	2 High
3	Predictive First-Visit Resolution Support for Technicians	9	8	9	7	26	3.71	7 Low
4	Technician Skill-Based Routing & Dispatch	8	7	8	6	23	3.83	6 Low
5	AI-Assisted Pre-Installation Diagnostics	7	6	8	5	21	4.20	4 Medium
6	Proactive Appointment Confirmation & Rescheduling Automation	7	8	6	3	21	7.00	1 High
7	Targeted Root-Cause Fixes for High-Frequency Service Failures	7	6	7	5	20	4.00	5 Medium

1

$$\sum (\text{Bar Chart Icon} + \text{Calendar Icon} + \text{List Icon}) = \text{CoD}$$

Phase 2: Prioritization | Alternative Approach

Using an alternative simpler framework, opportunities can be prioritized by anticipated value and complexity to drive resources on quick wins and higher priority initiatives.



Section Chapters:

Chapter I: AI Problem Solving

Chapter II: Agentic Tool Dev

Chapter II: Agentic Tool Development & Agile Delivery



AI Tool Development Approach with Agile Delivery

This chapter covers the design, prototyping, and deployment of AI tools using agile methodologies to accelerate time-to-value.

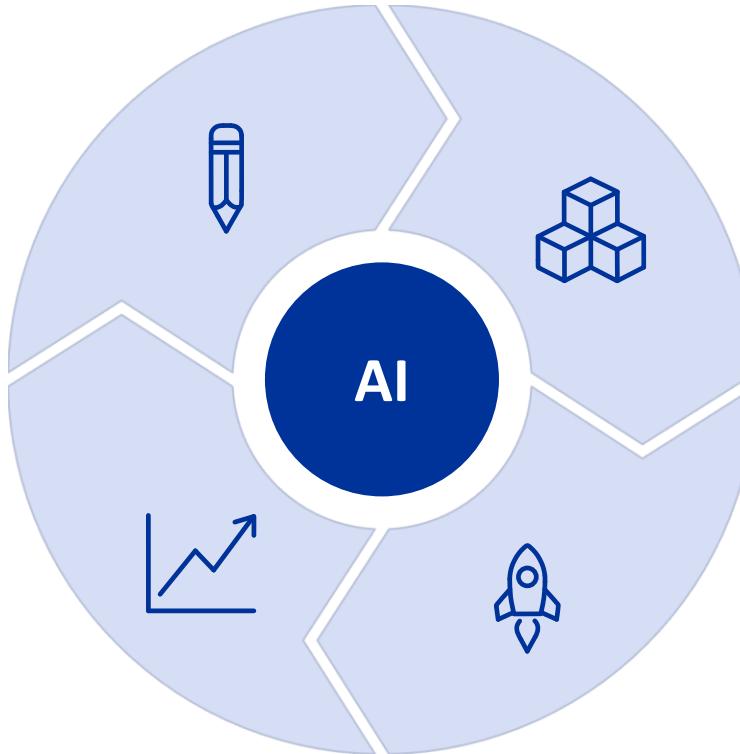
*Initial Phases Completed:
Priority Opportunities Identified*

Design

Define tool requirements and user experience at high level

Iteration

Measure outcomes and refine the solution based on learnings



Prototype

Build rapid prototypes for validation and feedback

Deployment

Release incrementally with continuous integration and ensure user adoption

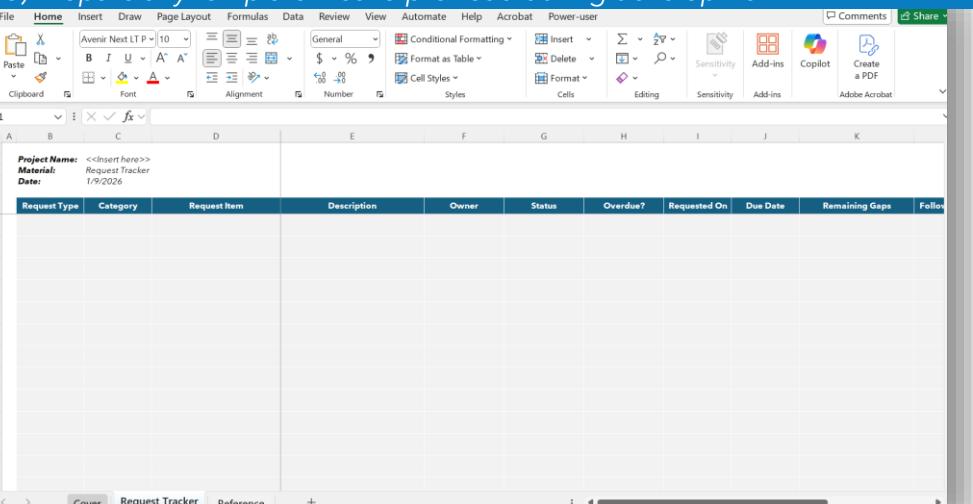
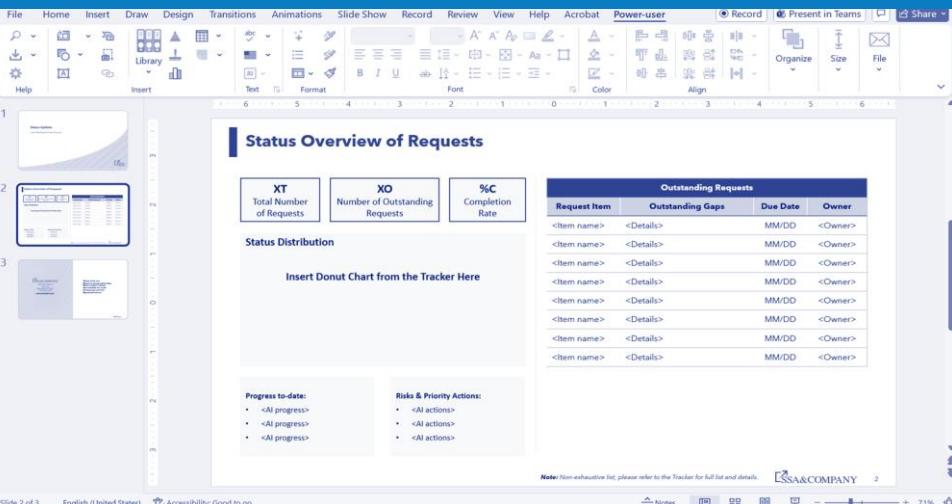
AI Tool Development | Design & Prototype



Pre-Development Phase	Design	Prototype
Prioritized opportunity identified during the previous phase	<ul style="list-style-type: none">Convert the business vision to high-level requirementsDefine and structure the solution to have an effective process flow, mechanics, and user-friendlinessOptionally, prepare any template files to pre-load during development phase	<ul style="list-style-type: none">Develop an initial prototype by leveraging Generative AI Chatbots and development programsConduct preliminary testing and fix issues (repeat)Improve the solution architecture and featuresPrepare and share the solution package for deployment



AI Tool Development | Design - example

Pre Phase	Design
<p>Example:</p> <p>Solution: Digital Data Request Tracker</p> <p>Business Problem: Manual, time-consuming, non-standardized data request list generation, collection, and tracking process</p>	<p>1) Convert the business vision to high-level requirements</p> <p>Introducing Digital Data Request Tracker: Intelligent Workflow Automation</p> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;">  <p>Smart Suggestions AI analyzes client name and project scope to intelligently suggest comprehensive data requirements</p> </div> <div style="text-align: center;">  <p>Auto-Generated Tracker Creates detailed initial tracker with categorized data items and timeline recommendations</p> </div> <div style="text-align: center;">  <p>Dynamic Updates Automatically matches received documents against requests and updates completion status</p> </div> <div style="text-align: center;">  <p>Knowledge Repository Builds institutional memory by saving improved trackers for future project reuse</p> </div> </div> <p><small>ESSA&COMPANY 3</small></p> <p>2) Define and structure the solution process flow</p> <p>Digital Data Request Tracker: Process Flow</p> <ul style="list-style-type: none"> Input Client Data Upload SOW, project brief, or enter client name and scope details. Also, upload received client data and any changes to the data request items list AI Processing AI analyzes context and suggests comprehensive data requirements based on project type Tracker Generation System creates initial tracker with categorized items, priorities, and timelines Status Monitoring Continuous tracking of document receipt, matching, and completion status updates in form of excel and/or ppt decks  <p>3) Prepare any template files to pre-load during development</p> <div style="display: flex; justify-content: space-around;"> <div style="width: 45%;">  </div> <div style="width: 45%;">  </div> </div>



Agentic Tool Development | Prototype - example

Design

Example:

Solution:
Digital Data Request Tracker

Completed thus far:

- ✓ Initial Design Document
- ✓ PPT and Excel Templates

Prototype

1 & 2) Develop an initial prototype by leveraging Generative AI Chatbots (1) and development programs (2)

The dashboard displays five document versions: Quick deploy v3.11.0, Visual summary v3.11.0, Implementation guide v3.11.0, Decision tree v3.11.0, and V3.11.0.ppt generator fix. Below the dashboard is a code editor window showing the following Python code:

```

1 """
2 Digital Data Request Tracker v3.11.0
3 NEW IN THIS VERSION (v3.11.0):
4   1. Fixed "Outstanding Gaps" in PPT: "All data needed" only for Data
5   2. PPT now uses template slides 2, 3, 4 (doesn't create new slides)
6   3. Smart distribution of items across slides
7
8 CRITICAL FIXES IN v3.10.0:
9   1. Dashboard now auto-updates immediately when changes are saved
10  2. AI Fill Gaps recognizes ALL new entries and invalid status values
11  3. Added delete functionality for uploaded files with tracker ref
12  4. Enhanced gap detection for invalid status values
13
14 Previous fixes maintained:
15  1. PPT template auto-loads from /mnt/user-data/uploads by default
16  2. Fixed table population to correctly start from row 2 with proper
17  3. Table now shows: Request Item | Outstanding Gaps | Due Date (M)
18  4. Multi-slide support: Creates additional slides for >10 outstanding
19  5. Made template upload entirely optional - works out of the box
20 """
21
22 import streamlit as st
23 import pandas as pd
24 import json

```

3) Conduct preliminary testing and fix issues (repeat the process)

The application interface includes a sidebar with project management options like Share Project, Current: Project_Test (shared by doker), and a file upload section. The main area shows the "Request List" tab, which lists "Establish Initial Request List" and "Upload Existing List". It also includes an "AI Generate List" feature where users can upload documents to generate a list.

The code editor shows a project structure for "PythonProject15" with files like app.py, requirements.txt, and various JSON and CSV files. The app.py file contains code related to the digital data request tracker, including a function to parse project names.

```

1 """
2 Digital Data Request Tracker v3.10.4 - PART 1 OF 4
3 Complete Fixed Version
4
5 CHANGES IN THIS VERSION:
6   1. Fixed all NoneType errors related to current_project checks
7   2. File names now display as comma-separated list (no "COMBINED:" prefix)
8   3. Added safe helper function for parsing project names
9   4. All " (shared by " checks now properly handle None values
10
11 import ...
12
13 STORAGE_DIR = Path("data_storage")
14 STORAGE_DIR.mkdir(exist_ok=True)
15 USERS_FILE = STORAGE_DIR / "users.json"
16
17 # HELPER FUNCTION FOR SAFE PROJECT NAME PARSING
18 # =====
19 def parse_project_name(project_name):
20     """Safely parse project name to extract base name and owner.
21     Returns: (base_name, owner, is_shared)
22
23     Examples:
24     "My Project" -> ("My Project", None, False)
25
26     Scanning files to index... 1602:1 1F 4 spaces Python 3.13 (PythonProject15) c0

```

4) Prepare and share the solution package for deployment

The file explorer shows the contents of a folder named "Digital Data Request Tracker (4 items)". Inside are subfolders "data_storage", "template", "app", and a "requirements" file. A large zip file icon is visible on the right side of the screen.



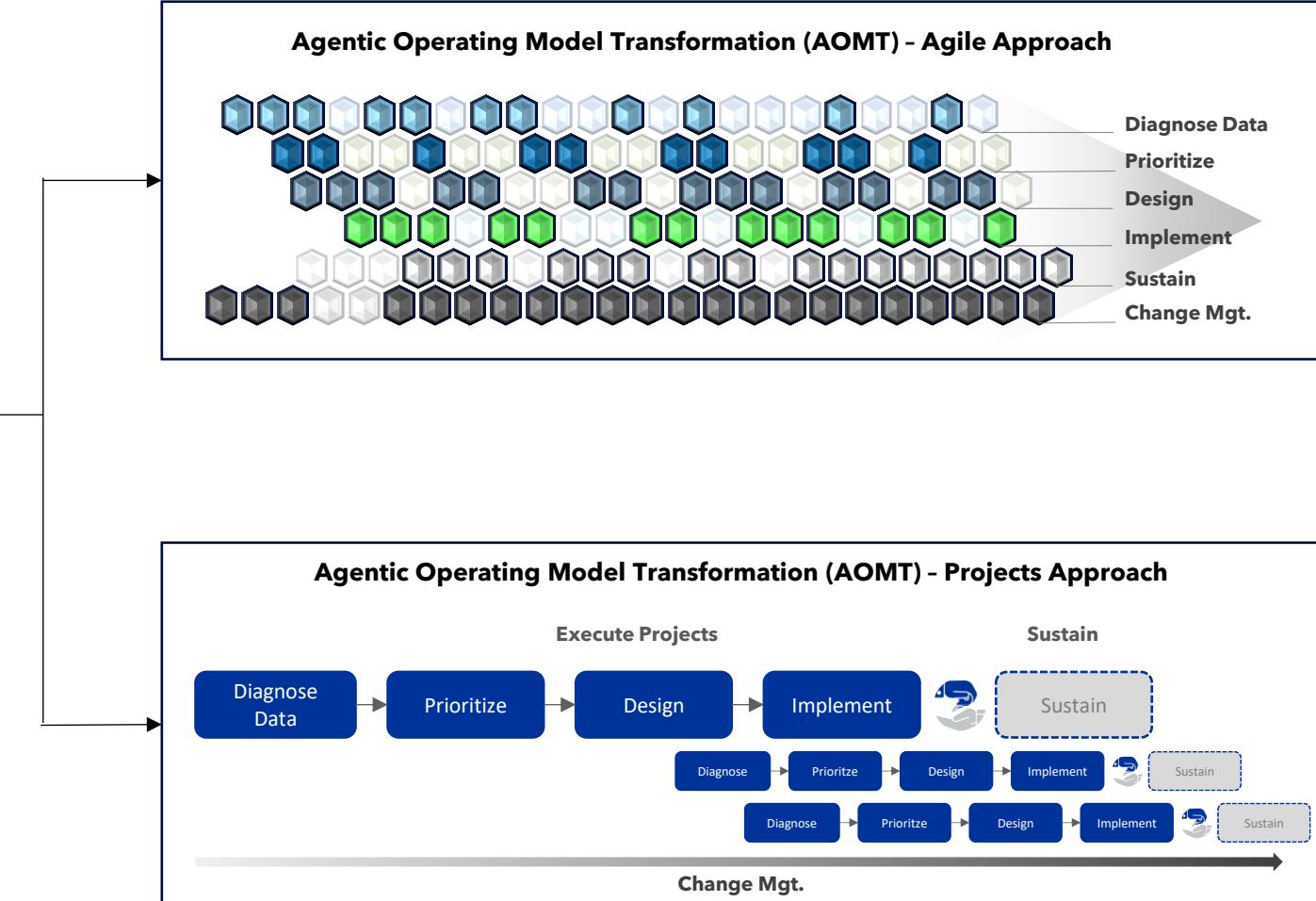
Solution Implementation Approaches | Agile Delivery

AOMT is **best implemented in a comprehensive non-linear, agile, and iterative manner.**

However, depending on an organization's level of solutions delivery, AOMT can be applied as a sequence of key activities on specific projects and then transformed to an agile approach over time.

Regardless of the approach taken, the most significant early action to **ingest all pertinent data:**

- Systems data (machine logs)
- Transactional data (workflow details)
- Unstructured data (emails, chats, etc.)



Note: In general, having access to more data is better, as a limited dataset can fail to reveal the true nature of the problem and often requires additional data requests and repeated reviews which can slow project work - get as much data as possible up front.

Solution Development Lifecycle | SAFe Development Methods

Assess & Plan



Organization Leaders provide vision and direction for solutioning based on results from the Investigation Phase



Program Office develops roadmaps for prioritized solutioning based on:

- **Economic View** - ROI, value creation
- **Systems Thinking** - big picture view



Architecture Review Board (ARB) confirms system architecture is robust to variability and is adaptable to change.
Note: ARB approves all plans prior to hand-over to build teams



Voice of Customer (VOC) | Needs + Wants to inform requirements and add context to the transformation strategy



Voice of the Marketplace (VOM) | Demand + Fit to inform the transformation strategies and architectural designs



Agile Design, Build, Test



Deploy & Adopt Users

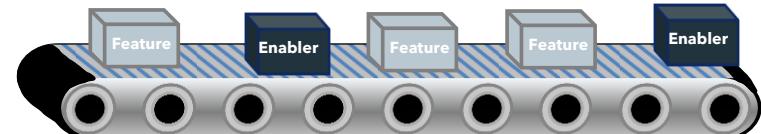
Continuous Value Delivery



Product Owners drive adherence to the transformation roadmap making roadmap adjustments to meet business dynamics while achieving transformational goals.



Backlog is actively managed to ensure a continuous flow of features and enablers assigned to agile build teams



Agile Build Teams develop incremental features and enhancements using an iterative process with finished features and enhancements delivered against the strategic transformation plan



Scrum Master manages agile build teams, removing roadblocks to produce sustainable value, as characterized by:

- **Incremental Build** strategies being maintained
- **Milestones** are met with consistency
- **Build Flow** is continuous
- **Cadence** is consistent with delivering to roadmap objectives

"Develop on cadence / Deliver on demand"



Feedback Loop - to adjust plans based on business dynamics



Business Leaders sign-off on deliver to requirements and commit to adoption



Release Management schedules release and verifies all dependencies are met



Change Management Team ensures end users are prepared for changes to maintain intrinsic motivation



Voice of Customer (VOC) | Feedback to confirm delivered features and enhancements meet business needs

Section Chapter:

**Performance Mgmt.. &
Sustainment**

SECTION 2: SUSTAINMENT

Playbook Deep Dives:

**SECTION I:
Practitioners
Guide**

Chapter I: AI Problem Solving

Chapter II: Agentic Tool Dev & Agile Delivery

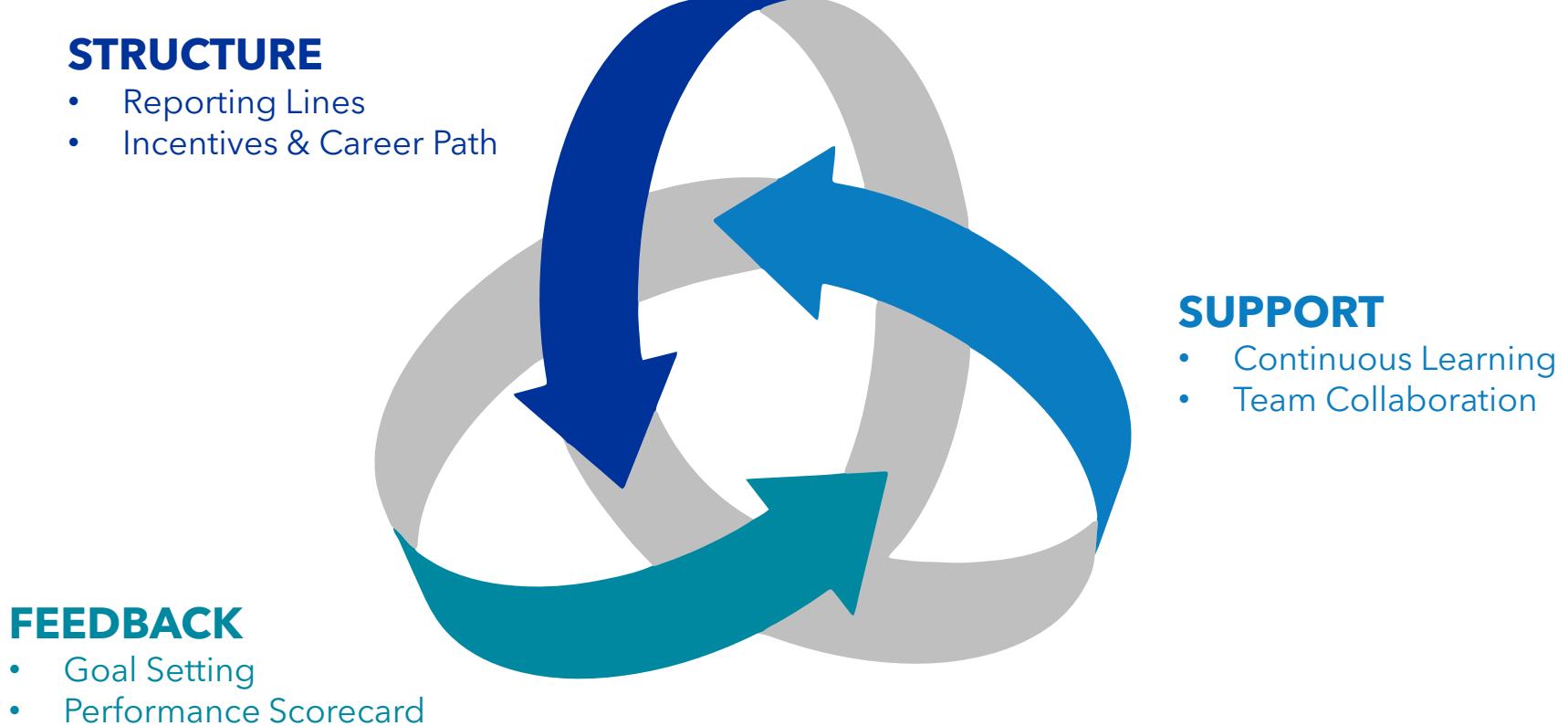
SECTION II: Perf. Mgmt. & Sustainment

SECTION III: Change Readiness



Sustainment Framework

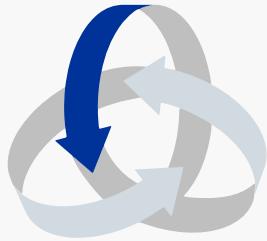
In transformation efforts, sustaining the change is the most difficult step because it requires permanent changes in individual behaviors. A successful change program applies multiple levers across Structures, Support and Feedback.



Change sustainment requires establishing long-term support structures. The approach to sustainment varies by organization due to culture, past experiences, and work environment. It is likely that multiple forms of structure, support, and feedback are necessary for the different stakeholders impacted by the change.

Sustainment | Structure

Sustainment requires structural alignment. Organizational structures must be intentionally reviewed and, if needed, redesigned to support and reinforce new behaviors and ways of working—otherwise changes will regress to old patterns.



STRUCTURE

- Reporting Lines
- Incentives & Career Path

Sustainable change requires alignment across structure, metrics, leadership messaging, and incentives.

Without this organizational alignment, teams optimize in their silos at the expense of enterprise outcomes.

Reporting Lines

Siloed groups and misaligned reporting lines hinder sustainment.

- When ownership of an end-to-end process is split across organizational groups, objectives, metrics, and leadership messages often diverge
- This generates behaviors that conflict with sustained change and overall goals
- *Example:* Production group is measured on speed and volume, while the Legal group is charged with ensuring quality and regulatory compliance

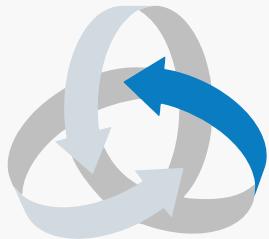
Incentives & Career Path

Incentives and career path shape long-term behavior and may hinder change.

- If variable pay and recognition are not updated to reflect new methods and desired behaviors, employees will continue optimizing for old metrics, even when they contradict the intended change
- *Example:* Top salesperson awards are presented to staff members registering the highest sales volume, but not necessarily the most profitable sales

Sustainment | Support

Lasting change is not a one-time event. Meaningful, durable change happens through ongoing support and continuous reinforcement, not through isolated initiatives or single interventions.



SUPPORT

- Continuous Learning
- Team Collaboration

Sustainable change requires continuous learning and interactive team collaboration.

Without continuous learning systems and collaborative support network, disconnected individuals and teams diverge from best practices, standardized methods, and shared knowledge, hindering overall performance and consistent adoption of evolving practices.

Continuous Learning

Workforce without proper training and skills struggles to adopt change.

- Continuous learning culture and practices is crucial for sustainment.
- New process discoveries and reinforcement of key methods should become part of the normal business practices to avoid repetition of errors throughout staff
- Example: Many professional classes require annual recertification on critical skills and some professionals conduct peer reviews of complex cases to increase staff awareness

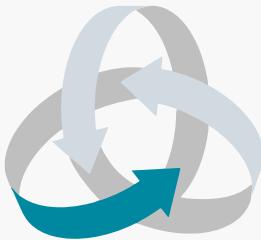
Team Collaboration

Insufficient team engagement and interaction degrades standardization.

- Post-training, team members often are left to apply new practices individually. As a result, variability degrades standardized methods, and sustainment of changes suffers.
- Team standups offers a safe environment to collaborate, discuss, and close knowledge gaps together
- Example: Teams that have implemented 15-minute daily huddle meetings often dedicate the final minutes to identify process issues and reinforce work practices

Sustainment | Feedback

Sustainment requires clear goals and continuous performance feedback. This ensures teams stay aligned and can adapt their efforts based on measurable progress.



FEEDBACK

- Goal Setting
- Performance Scorecard

Sustainable change requires aligned goals and real-time performance scorecards.

Without clear goal-setting and effective feedback mechanisms, teams lack direction on desired behaviors and ways of working and visibility into the KPIs needed to track progress toward intended business outcomes.

Goal Setting

Misaligned goals prevent staff performance to reach new business objectives.

- Goals established for team performance should follow the SMART criteria (Specific, Measurable, Achievable, Relevant, Time-bound)
- Goals should be translatable to individual daily performance to the impact of changes in their work
- Example: Daily, weekly, monthly goals help ensure teams are making productive use of efficiency gains realized from process improvements

Real-time Performance Scorecards

Lack of real-time visual displays of performance impairs sustainment.

- Performance scorecards should be readily available to staff members who have been asked to change
- They should reflect both individual and team performance in near-real-time or real-time
- Example: Customer service centers typically display queuing statistics, call abandonment rates, caller wait times, and call handling time on digital display boards visible from all parts of the workspace

Section Chapter:

Change Readiness

SECTION 3: ORGANIZATIONAL CHANGE

Playbook Deep Dives:

SECTION I:
Practitioners
Guide

Chapter I: AI Problem Solving

Chapter II: Agentic Tool Dev & Agile Delivery

SECTION II: Perf. Mgmt. & Sustainment

SECTION III: Change Readiness



Change Management | Readiness Baseline



North Star

Confirm the North Star vision.

- Are all employees aware of the strategic vision for where the organization heading and wants to be in 5 years?
- Do employees understand how their daily work contributes to achieving the North Star vision?
- How has the digital improvement work been presented to employees relative to the North Star vision?
- What measures and methods are used to register progress in the North Star journey and how is progress communicated?



Performance Management

Confirm KPIs and how project-level success measures are aligned.

- Are performance goals and KPIs explicitly aligned with the behaviors and outcomes required by the change?
- Do employees clearly understand how their individual performance contributes to the success of the change?
- Are we measuring and rewarding adoption and behavior change, not just business results?
- Do managers provide regular feedback and coaching focused on new ways of working?



Resources

Confirm resource capacity and capabilities.

- Can necessary resources be dedicated to participate in solution design, build, test, and implementation activities?
- How will resources be structured into teams, and what strategy is in place to repatriate practitioners after the project is completed
- What methods are in place to assess existing skills and how will skills acquisition be managed
- What standardized practices are in place for project management and change management

Change Management | Readiness Assessment



Case for Change

Assess the case for change.

- Does everyone in the organization realize the need for change?
- Does everyone feel change is needed even if it causes short-term disruptions?
- Do all levels of the organization understand how the benefits of change will impact them?
- Do all levels of the organization realize the likely eventualities of not changing?



Influence Network

Define the organization's influence network.

- How do employees know what is important to the organization and organizational leadership?
- How does direct manager impressions (endorsement) enhance organizational messaging?
- Who are the staff level "go to" employees that colleagues seek out for coaching/mentoring through change?
- How are low levels of change adoption mitigated within the organization?



Communications

Codify organizational communications.

- Which channels are perceived as convey important information?
- How does communication authorship influence effectiveness?
- What characteristics define a recent "effective" communication and what short-coming have been noted?
- How impactful is frequency of communication?
- What is the most effective "lead-time"?
- How are messages typically reinforced?
- What mitigations strategies are in-place to bolster messaging that appears not to have been received?

Change Management | Readiness Assessment: Survey

Readiness survey sections should move deliberately from strategic motivation, to organizational capacity for change, to practical ability to execute, while intentionally capturing perception gaps across leadership, management, and staff.

Survey Questions Distribution - example



Business Drivers

E M

- Purpose:** Establish / validate strategic urgency for AI adoption
- Lens:** Enterprise-level outcomes (growth, competitiveness, cost, customer value)
- Audience focus:** Primarily Executives, with a small, overlapping subset for Managers to validate alignment

Organizational Readiness

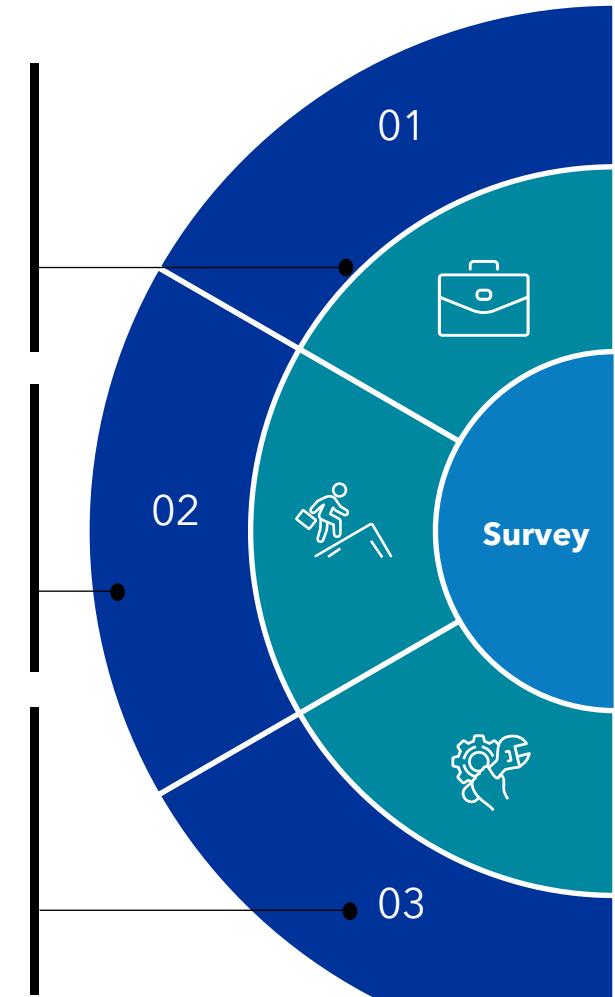
E M S

- Purpose:** Assess the organization's ability to absorb and execute change
- Lens:** Culture, leadership, energy, learning, and collaboration
- Audience focus:** Executives, Managers, and Staff

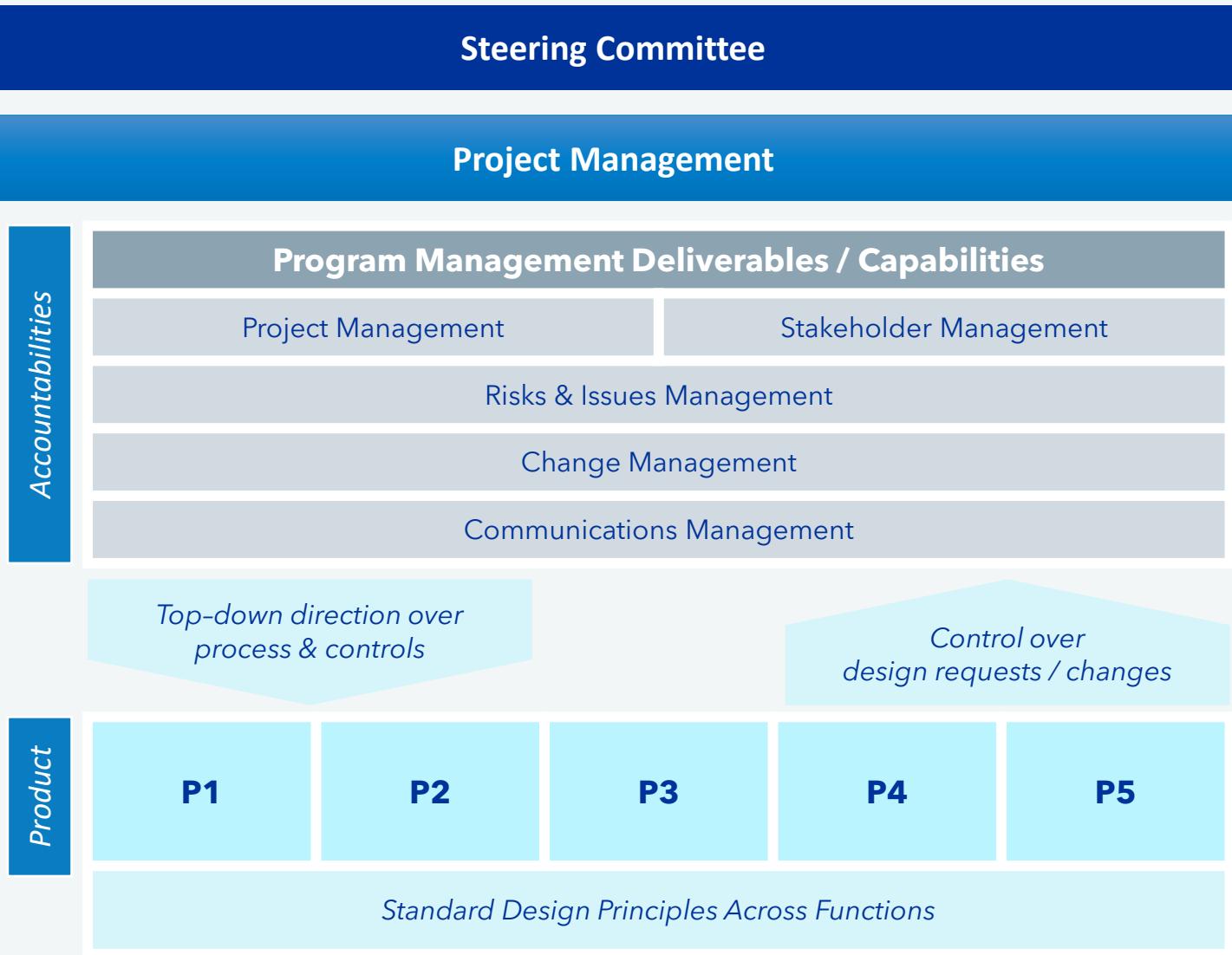
Capabilities & Resources

M S

- Purpose:** Evaluate execution readiness, not just intent
- Lens:** Tools, skills, data, operating model, and support
- Audience focus:** Managers, split into Tech Managers vs. Business Managers, in addition to a limited Staff view.



Change Management | Governance



Governance Principles:

- **Establish a system** of rules, practices, and processes to drive a consistent project delivery discipline across regions
- **Optimize value** by top-down regional implementations in compliance with standard process, controls, and technology / data architecture
- **Leverage a Program Lead** to govern the critical capabilities for the transformation

Summary

The Playbook guides your organization to harness AI for meaningful, sustainable change.

3

Main Sections

Comprehensive coverage from problem-solving to delivery to change management

2

AOMT Core Principles

Data First and AI First guide every transformation decision

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Use Cases

Tool-agnostic framework adapts to any organizational context

Transform with intention. Start with data. Lead with AI. Sustain through people.



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Expert problem-solving
Accountability for results
Transparency and trust
Exponential returns