

Excellent — this is exactly the kind of initiative that can set you apart as both a *thinker* and a *builder of new capability* inside Bullivants.

Let's design this properly. To create your roadmap for the **Discovery Sprint** and the **Cross-Functional AI Project Group**, I'll first confirm a few things so I can tailor the plan precisely. Then I'll outline Phase 1 in full detail (objectives, structure, methods, templates, outputs, meeting rhythm, and leadership comms).

## **Before I draft your roadmap, I need to clarify these**

Please answer these quickly (short sentences are fine):

1. **Timeline:** How long do you want the Discovery Sprint to run? (e.g., 4 weeks, 6 weeks, 8 weeks?)
2. **Access:** Can you freely interview or shadow Customer Service Officers (CSOs), or do you need approvals?
3. **Deliverable format:** Would you prefer a *deck* (e.g., 5-10 slides summarising findings) or a *report/notion-style doc* as the final output?
4. **Leadership audience:** Who are you ultimately presenting to — e.g., Head of Bullivants, Head of Pricing & Analytics, or the CCO?
5. **Bandwidth:** Do you have ~3 hours per week from each project-group member (sales mgr, CS mgr, tech) or less?
6. **Goal framing:** Do you want the sprint to *discover high-value AI use cases only*, or also to produce a **readiness score + roadmap** for when/where AI can be applied?

Once you confirm those, I'll provide:

## **Deliverable from me**

A complete **Discovery Sprint roadmap** divided into:

- **Part 1 – Strategy:** What to achieve and how to think (mindset, hypothesis framing, AI vs automation lens)
- **Part 2 – Fieldwork:**
  - How to run interviews/observations (templates, key questions, note structure)
  - How to code and cluster findings into use-case themes
- **Part 3 – Project Group:**
  - Roles of each member, how to use them as insight-generators not passengers
  - Sample 4-week meeting format (agenda, what to prep, what to capture)
  - Mini “AI fluency drip plan” to raise awareness without derailing discovery

- **Part 4 – Synthesis & Leadership Presentation:**
  - How to score opportunities (Value × Feasibility × AI Readiness)
  - Deck/report outline
  - Example recommendations structure (e.g., “Co-pilot uplift”, “Data readiness gap”, “2 pilot candidates”)

To give you a taste before you answer:

- Your sprint will not “train” them in AI but **mobilize business intelligence** — they’ll surface friction points; you’ll translate them into automation or AI possibilities.
- The six-level diagnostic model you found will become your **lens**, not your questionnaire. You’ll map pain points *after* listening, not impose levels *during* interviews.
- Yes, this sprint will surface **both automation and AI** opportunities; I’ll show you how to differentiate them (AI = judgment + pattern learning; Automation = rules + trigger-action).

Can you confirm those six answers above?

Once I have them, I’ll deliver your full roadmap — practical, Bullivants-specific, and ready to start next week.

**You said:**

1. 6 to 8 weeks 2. I don't need any approvals. 3. Deck preferable 4. Head of Bullivants. 5. I don't know that yet. But lets presume I have 3 hours per week from each project group member 6. Readiness score plus roadmap would be great.

**ChatGPT said:**

Perfect — that’s clear and gives enough room to design a **high-impact, low-waste 6–8-week Discovery Sprint** that balances exploration with structure.

Here’s your full roadmap, written as if you were leading this as an internal innovation project.

## **Phase 1: Discovery Sprint — *Exploring the Use of AI Applications in Customer Service (Bullivants)***

**Duration:** 6–8 weeks      **Output:** Executive deck to Head of Bullivants      **Goal:** Identify, score, and roadmap high-potential AI and automation opportunities + assess readiness.

## **PART 1 – STRATEGY & MINDSET**

## Objectives

1. **Discover pain points, not tools.**  
Observe and listen before mentioning “AI.”
2. **Diagnose work types** (judgment vs repetition vs search).
3. **Assess readiness** — data, process, risk, volume, consistency.
4. **Produce a portfolio** of candidate use-cases ranked by value × feasibility × AI-readiness.
5. **Deliver a narrative:** “Here’s where AI can / can’t add value today, and the next right step.”

## Approach Philosophy

“Don’t start with AI. Start with what hurts.”

- You’re not hunting for AI use cases; you’re discovering **decision bottlenecks, repetition, and information friction**.
- Once pain points are mapped, **you’ll layer the Six-Level AI Model** to classify maturity.
- The outcome may be: “We’re not ready for AI, but here’s a readiness roadmap.”

# PART 2 – FIELDWORK DESIGN

## 1. Methods Mix

Method	Purpose	Format
Contextual Interview	Surface pain, decision moments, data flows	45 min 1-on-1
Shadowing / Observation	See real workflow friction	1–2 h blocks
Quick Diary Study	Let officers jot “AI wish list” moments	Shared sheet
Mini-Workshop (Week 4)	Cluster and re-frame insights	90 min group

## 2. Interview Template (15 core Qs)

### A. Context & Process

1. Walk me through a typical customer case from start to finish.
2. Where do you spend the most time?
3. Which parts feel repetitive or manual?
4. Which steps require judgment or checking multiple systems?

## B. Information & Data

5. What info do you need most often, and where does it live?
6. What tools or systems frustrate you?
7. What info is hard to find or unreliable?

## C. Decision & Risk

8. What decisions do you make daily?
9. What could go wrong if you got one of those wrong?
10. When do you escalate to your manager?

## D. Opportunity & Vision

11. If you had a “magic assistant,” what would it do?
12. What tasks would you never hand over to automation?
13. How do you know a customer interaction went well?

## E. Volume & Variability

14. How many of these cases happen each day/week?
15. How similar are they?



## 3. Note-Taking Framework (one per task)

Field	Example
Task Name	Order Follow-up
Volume	200 tickets / month
Consistency	70 % identical / 30 % exceptions
Risk Impact	Low – incorrect update causes re-call
Data Location	CRM + Email
Time Spent	15 min per case
Pain Points	Re-typing / searching for attachments
Possible AI Assist	Copilot draft response / auto-search docs
Level Guess	Level 3 – Tool-Augmented Assistant
Readiness Notes	Data structured; moderate risk



## 4. AI vs Automation Lens

Dimension	Automation	AI
Logic	Deterministic rules (“If X, do Y”)	Probabilistic reasoning / pattern learning
Data Need	Structured	Unstructured or semantic
Human Role	Review exceptions	Define context & train judgment
Example	Auto-route email by keyword	Summarise email tone & intent

So your discovery log should tag each opportunity as **Automation / AI / Hybrid**.

## PART 3 – PROJECT GROUP PLAYBOOK

### **Composition**

- You (lead / facilitator / translator)
- 2 Customer Service Officers
- 1 Customer Service Manager
- 1 Sales Manager
- 1 Field Service Technician


### **Kick-off (Week 1)**

**Purpose:** Set tone of curiosity, not training.

**Format:** 60 min session

#### **Agenda**

1. Why we're doing this (5 min)
2. What's changing in AI land (10 min demo e.g., ChatGPT use case relevant to CS)
3. How we'll work (roles + 6–8 week timeline)
4. First assignment (“Interview one peer about frustrations”)


 **Outcome:** They feel like co-discoverers, not students.

### **Weekly Catch-Up (30–45 min)**

Week	Focus	Format	Output
1	Kick-off & assign interviews	Group	Shared template
2	Debrief insights 1–3	Stand-up	Key themes emerging
3	Shadowing insights	Roundtable	Top frictions
4	Mid-sprint workshop	In-person / virtual	Cluster pain points → AI/Auto hypotheses
5	Diagnostic mapping	Group	Each use case scored Level 1-6
6–7	Prioritization	Group	Shortlist 3–5 pilot candidates

8	Presentation rehearsal	Group	Draft deck
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## 💡 AI Fluency (Drip, not course)

- Week 2: 10-min demo (“How I use ChatGPT for summarising emails”)
  - Week 4: 10-min exercise (“Write a prompt to extract customer sentiment”)
  - Week 6: 10-min reflection (“Where could AI save you 30 minutes a day?”)
-  You spread fluency organically without turning the project into a training program.

# PART 4 – SYNTHESIS & LEADERSHIP PRESENTATION

## 1. Scoring Matrix

Criterion	Scale (1–5)	Weight
Business Value	Cost / time saved / customer impact	30%
Technical Feasibility	Data availability & integration ease	30%
Risk Tolerance	Consequence of error	15%
Volume & Consistency	Frequency & pattern clarity	15%
Readiness Level	Using Six-Level AI model	10%

Rank each idea → bubble chart (Value vs Feasibility).

## 2. Deck Outline (10 slides)

1. **Why Now:** AI context + Bullivants vision
2. **Objective & Approach:** Discovery Sprint method
3. **What We Did:** Interviews, shadowing, workshops
4. **Themes Found:** E.g., search friction, manual updates, slow approvals
5. **AI Readiness Snapshot:** matrix across functions
6. **Top Use Cases:** (3–5) with Level classification + score
7. **Quick Wins (Co-Pilot/ChatGPT):** Training / templates
8. **Medium Term Pilots:** Structured workflow / semi-automation
9. **Gaps to Close:** Data quality, APIs, process variation

## 10. Recommendations & Next Steps: Pilot plan + governance



### 3. Readiness Scorecard

Dimension	Score (1–5)	Notes
Data Accessibility	2	Scattered across CRM + email
Standardization of Processes	3	Branch variance moderate
AI Fluency	2	Early stage – few prompt users
Risk Tolerance	3	Medium – supervised automation OK
Leadership Support	4	Appetite for efficiency strong

Output → simple radar chart to show readiness at a glance.



## OPTIONAL PILOT READINESS TEMPLATE

Pilot Name	Problem Statement	Current Effort (Hours/Mo)	Target AI Level	Expected Impact	Next Step
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## NEXT STEPS THIS WEEK

1. **Write a one-page “Discovery Sprint Charter”** — purpose, duration, team, and success definition.
2. **Schedule the 60-min Kick-off** (Week 1).
3. **Set up a shared Notion / Excel log** with the interview template & note structure.
4. **Select 4–5 initial CSOs** to interview.
5. **Book your first catch-up agenda** using the table above.

Would you like me to draft that **Discovery Sprint Charter** (one page you can send to the team and leadership to announce the project)?

It would summarise purpose, outcomes, who’s involved, and next milestones — perfect as your kickoff document.

**You said:**

Yes. Send the charter

**ChatGPT said:**

Perfect.

Here's your **Discovery Sprint Charter** — written in a crisp, internal-project tone that fits Bullivants' culture (practical, forward-leaning, but not buzzwordy).

You can paste this into an email, PDF, or slide and use it directly for kickoff and leadership alignment.



## Project Charter: Discovery Sprint — Exploring the Use of AI in Customer Service

**Sponsor:** Head of Bullivants

**Project Lead:** Rahul Tawde – Pricing & Analytics Manager

**Duration:** 6–8 Weeks (Discovery Sprint)

**Team:**

- Customer Service Manager
- Two Customer Service Officers
- Sales Manager
- Field Service Technician
- Pricing & Analytics (Lead)



## Purpose

To explore how Artificial Intelligence (AI) can enhance customer service operations at Bullivants — identifying high-value opportunities, assessing readiness, and building a roadmap for future pilots.

The sprint aims to **discover, not decide** — uncovering where AI or automation could meaningfully improve speed, accuracy, and customer experience.



## Objectives

1. **Map key workflows** within customer service (order handling, inquiries, quotations, returns, etc.).
2. **Identify friction points** — repetitive tasks, judgment-heavy decisions, and data bottlenecks.
3. **Classify opportunities** using the Six-Level AI Maturity Model (Advisor → Fully Autonomous).
4. **Assess readiness** across data quality, process standardization, and risk tolerance.
5. **Deliver a clear AI Readiness Score + Opportunity Roadmap** for leadership review.





## Approach

- Conduct **interviews and shadowing** with Customer Service Officers to observe real work.
- Use a structured **diagnostic framework** (volume, consistency, risk, data, speed) to evaluate each task.
- Facilitate **weekly team sessions** to cluster insights and co-develop ideas.
- Distinguish between **automation** (rule-based) and **AI augmentation** (judgment-based).
- Produce a **leadership deck** summarising findings, readiness, and pilot recommendations.



## Sprint Milestones

Week	Focus	Output
1	Kick-off & Role Alignment	Charter shared, interviews planned
2–3	Field Interviews & Shadowing	Pain points documented
4	Workshop: Pattern & Theme Clustering	Emerging opportunities
5–6	Diagnostic Scoring & Readiness Assessment	Use-case matrix + readiness radar
7–8	Prioritization & Presentation Prep	Final Deck: Readiness + Roadmap



## Expected Outcomes

- A **portfolio of 3–5 potential AI/automation use cases** ranked by value and feasibility.
- A **Bullivants AI Readiness Snapshot** highlighting data, process, and people gaps.
- Practical next steps — from simple co-pilot-style efficiencies to structured pilot opportunities.
- A shared understanding across Sales, Service, and Field of where AI fits into our customer experience.



## Definition of Success

- Real, first-hand insights from the front line — not theoretical ideas.
- Cross-functional engagement: every team member contributes one discovery or idea.

- A clear, actionable recommendation to the Head of Bullivants on where to start (and where not to).
- Creation of an internal base of **AI fluency and curiosity** within the service function.

Would you like me to follow this up with a **Kickoff Deck (5 slides)** you can present in Week 1? It would include:

1. Why AI, Why Now (Bullivants context)
2. Project Charter Summary
3. What We'll Do (Method + Timeline)
4. What's Expected from Each Role
5. What Success Looks Like

— basically your **“Day 1 launch pack”** to energize and align the group. Shall I draft that next?