

AI COPILOT WORKSPACE

Executive product brief | Conceptual case study

Decision in one sentence: Create an AI-assisted workspace that helps support leaders prioritize risk, inspect evidence, compare options, approve actions, and validate outcomes while preserving human accountability.

BUSINESS PROBLEM

Support leaders already have dashboards and reports. The gap is the time required to combine disconnected signals, understand why an issue matters, choose the right response, and track whether the action worked.

CORE WORKFLOW

1. Detect Cases, QA, surveys, workforce, knowledge, financial, and product signals.	2. Prioritize Customer, employee, operational, financial, compliance, and escalation impact.	3. Explain Evidence, confidence, assumptions, missing data, and conflicting sources.
4. Decide Accept, revise, defer, reject, escalate, or request more evidence.	5. Act Create an owner, workflow, timeline, communication, and audit record.	6. Validate Measure customer, quality, operational, financial, and risk outcomes.

PRIORITY ASSESSMENT

Factor	Example evidence
Customer impact	Repeat contact, negative sentiment, high-value accounts, service risk
Operational impact	Backlog, approval delay, reopen rate, handling time, manager effort
Financial impact	Credits, avoidable handling cost, retention risk, lost productivity
Confidence	Data completeness, source agreement, pattern strength, missing dependencies
Human review	Customer recovery, financial authority, employment, policy, legal, compliance

RESPONSIBLE AI CONTROLS

Grounded retrieval Cited approved data and knowledge	Confidence thresholds Low confidence requires more evidence	Human approval High-impact actions remain reviewed
Permission-aware access Role and purpose control visibility	Auditability Inputs, output, decisions, and outcomes recorded	Challenge mechanism Users can reject and document alternatives

IMPLEMENTATION ROADMAP

Timing	Phase	Primary work
Weeks 1-2	Discover	Map decisions, users, data, governance, pain points, risks, and measures
Weeks 3-4	Define logic	Create priority factors, evidence standards, confidence rules, and review boundaries
Weeks 5-6	Prototype	Build recommendation, evidence, option comparison, approval, and activity flows
Weeks 7-8	Integrate	Connect Salesforce, Amazon Connect, knowledge, QA, surveys, identity, and events
Weeks 9-10	Pilot	Test prioritization, explanations, human review, action creation, and escalation avoidance
Weeks 11-12	Stabilize	Refine thresholds, train leaders, establish monitoring, and launch governance

PLATFORM ARCHITECTURE

Experience Leader workspace, review controls, manager views, activity timeline	Decision Priority logic, recommendations, confidence, option comparison, impact model
Knowledge & data Salesforce, Amazon Connect, QA, surveys, workforce, billing, product, approved guidance	AWS & governance API Gateway, Lambda, EventBridge, Step Functions, DynamoDB, S3, CloudWatch, identity, logging, controls

SUCCESS MEASURES

Time to priority decision; recommendation acceptance, revision, deferral, rejection, and escalation; confidence calibration; evidence completeness; escalation avoidance; action completion; validated improvement; and reasons managers override recommendations.

EXPECTED OUTCOMES

Projected benefits include faster prioritization, earlier risk intervention, more accountable follow-through, clearer leadership visibility, and safer AI adoption. These are design targets and require pilot and production validation.

KEY TRADEOFFS

Speed vs. explainability: faster output is useful only when leaders can inspect the evidence. **Signal breadth vs. data quality:** more sources increase context but can reduce confidence when inconsistent. **Recommendation vs. automation:** the system can propose and prepare actions, but high-impact decisions remain human-owned. **Personalization vs. consistency:** adapt views while preserving shared governance and priority standards.