MOHI AI PARTNERS

REDACTED CLIENT EXAMPLE

AI-Enabled Customer Experience Transformation

Enterprise AI strategy, chatbot & intelligent-agent enablement, and a measured path from pilot to enterprise-wide ROI

2.4M	35%	3.2x	7 mo.
annual customer interactions	contact deflection	year-1 ROI	payback period

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Executive Summary

The Challenge

- Rising contact volume (2.4M interactions/yr) was outpacing service-team capacity
- Average handle time of 18.4 minutes and a $7.80 cost per contact were eroding margin
- CSAT had plateaued at 72, well below the enterprise's 85+ target
- Manual, cross-system workflows created inconsistent resolution and long handoffs

Our Approach

- Led discovery to prioritize AI use cases against volume, cost and CX impact
- Story-lined and drove the business case, ROI model and executive steering deck
- Managed delivery of a conversational AI chatbot and automation agents across service ops
- Owned the phased roadmap, KPI tracking and change management through scale-up

AI ENABLEMENT STRATEGY

Three Pillars of AI-Enabled CX

C

Conversational AI / Chatbot

- Deployed AI chatbot across web, mobile & messaging for top-20 contact drivers
- Integrated with the knowledge base for grounded, self-service resolution

61%

of inbound volume now triaged or resolved by the bot

A

Intelligent Agents & Automation

- Built AI agents to automate manual back-office and case-handling workflows
- Removed cross-system handoffs between service, billing and fulfillment

40%

of eligible manual tasks now automated end-to-end

G

CX Strategy & Governance

- Defined the AI adoption roadmap aligned to enterprise CX & cost KPIs
- Established model-risk, data-privacy and responsible-AI guardrails

100%

of use cases covered by monthly governance review

PILLAR 1 — CHATBOT PERFORMANCE

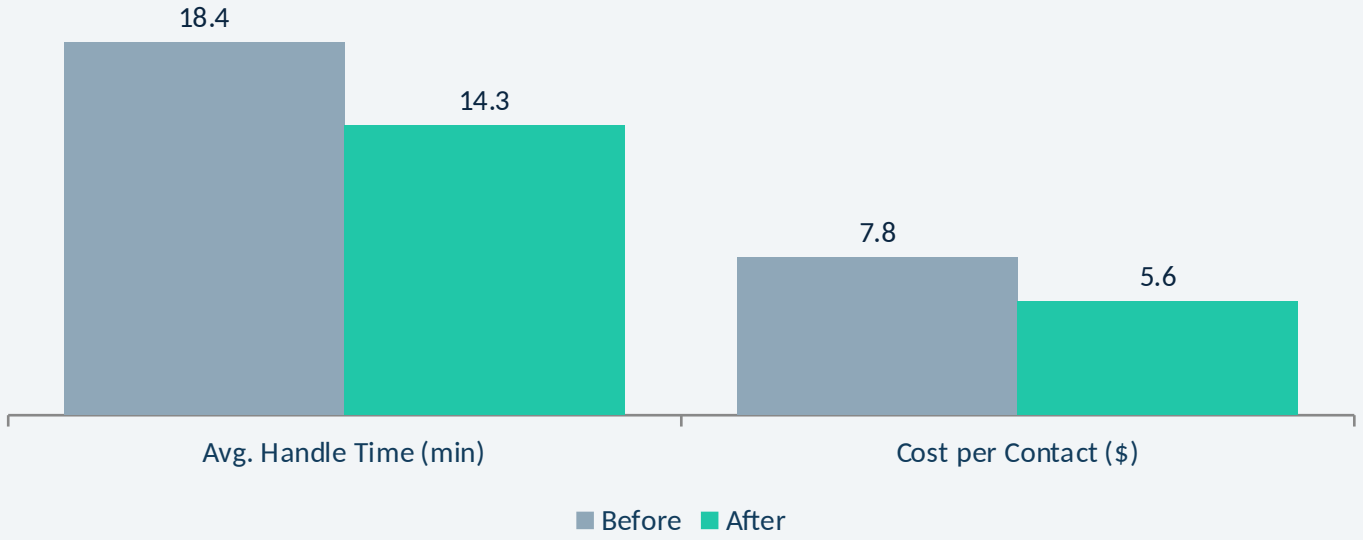
Conversational AI in Production

61%
of inbound volume triaged by chatbot

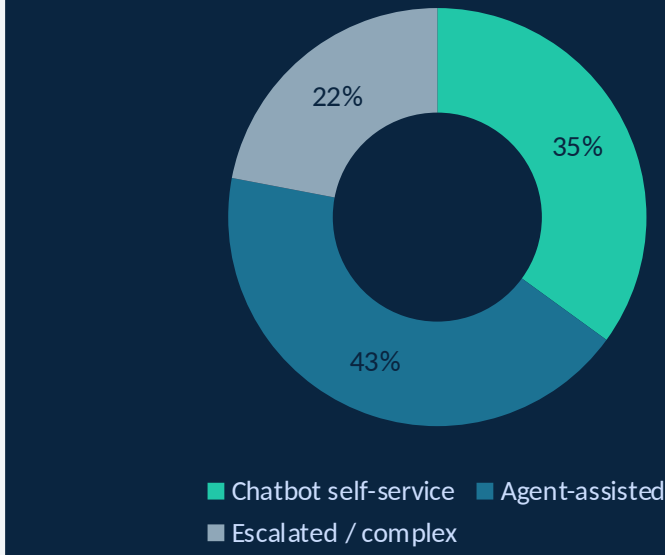
78%
first-contact resolution rate

4.6 / 5
in-chat customer satisfaction score

Average Handle Time & Cost per Contact — Before vs. After



Where the Volume Goes



35% of all contacts are now fully resolved by the chatbot, at a 3-second average response time, with no human involvement.

PILLAR 2 — AI AGENTS & AUTOMATION

Agentic Automation at Scale

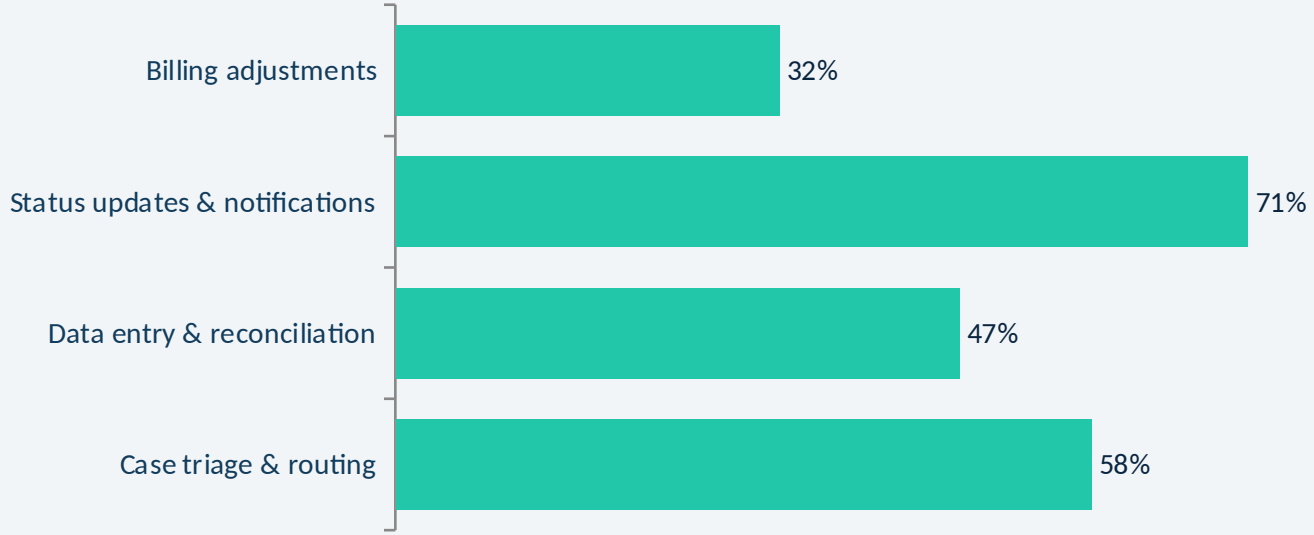
40%
of manual tasks automated

11,000
agent hours saved annually

+30%
service-team productivity

Automation Coverage by Workflow

also cut cross-system handoffs 65%



How the Agents Work

1. Intake: case or request received from chatbot, email or portal
2. Reason: agent classifies intent and pulls context from CRM & knowledge systems
3. Act: agent executes the workflow or routes to the right human owner
4. Learn: outcomes feed a monthly tuning cycle against KPI targets

ROI & KPI DASHBOARD

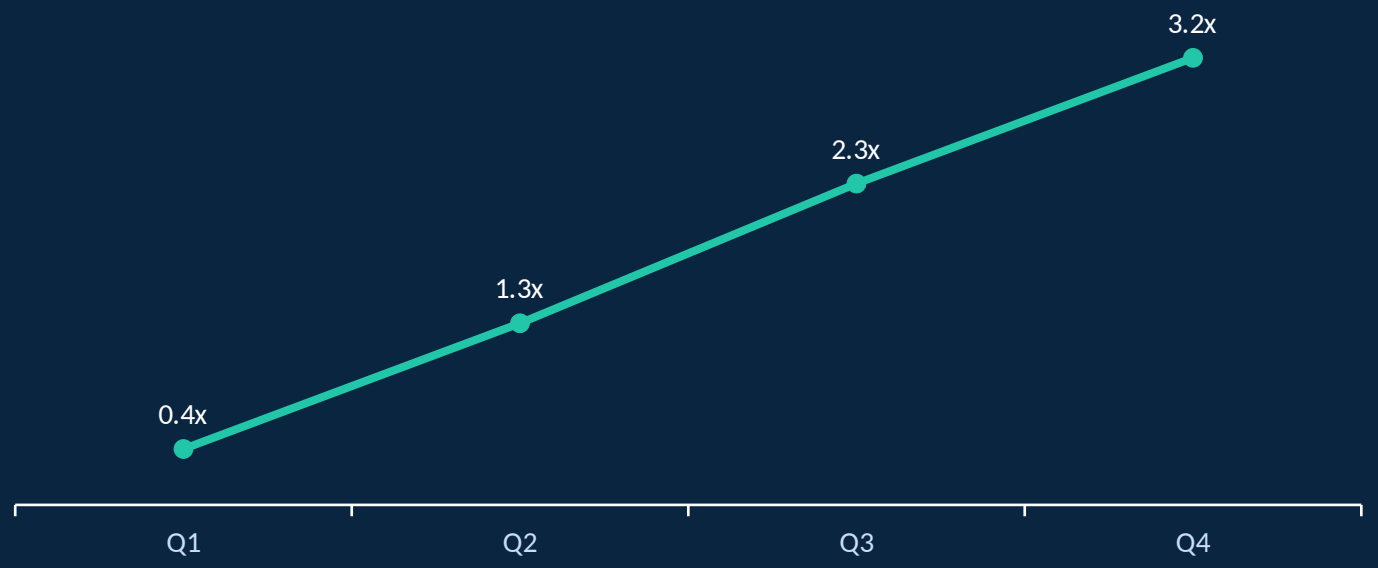
Measurable Business Impact

+12 pts
CSAT improvement
(72 → 84)

-28%
cost per contact
($7.80 → $5.60)

$1.2M
annualized savings
(Year 1, est.)

Cumulative ROI by Quarter — Year 1



Payback & Investment

- 7-month payback on implementation investment
- 3.2x return on investment within the first 12 months
- NPS improved 18 points (34 → 52) over the same period
- 92% of eligible contacts now routed through AI triage first
- Savings reinvested into Phase 3 scale-up and model tuning

ROADMAP

Four-Phase Implementation Plan

Q1 • PHASE 1

Discovery & Design

- Current-state CX & contact-driver analysis
- Use-case prioritization & AI architecture design
- Business case & executive alignment

Q2 • PHASE 2

Pilot: Chatbot & Agent MVP

- Launch chatbot for top-3 contact drivers
- Pilot first AI agent workflow with service team
- Stand up the KPI dashboard

Q3 • PHASE 3

Scale & Integrate

- Expand chatbot & agent coverage enterprise-wide
- Integrate with CRM and knowledge systems
- Begin cross-team change management

Q4 • PHASE 4

Optimize & Expand

- Tune models against ROI and KPI targets
- Define governance for continued AI expansion
- Plan Year-2 use-case pipeline

RESPONSIBLE AI, SUSTAINED

Governance & Next Steps

Guardrails in Place

- Human-in-the-loop escalation for high-risk or low-confidence cases
- Data-privacy review for every workflow touching customer PII
- Monthly model-performance & bias review with risk & compliance
- Executive KPI dashboard with transparent, auditable reporting

Recommended Next Steps

- Approve Phase 3 scale-up budget and timeline
- Expand the chatbot to two additional service lines
- Formalize the AI governance council with risk & legal
- Set Year-2 KPI targets and reconvene executive sponsors quarterly