

How We Eliminated a 6,500-Ticket Backlog in Five Days and Saved \$332,000 Annually

From Backlogged, Bleeding Revenue, and Bringing Down Two Companies to a Fully AI-Enabled Operation

The Asset

The owner of this company ran four businesses. Two of them shared a single in-house customer service department. The department handled all inbound contact for both brands: phones, emails, and everything in between.

On paper, it was a functioning operation with a team, a leader, and a decade's worth of institutional knowledge. The person running it had twenty years of customer service experience and had been in that specific role for two years.

Sara was VP of Operations for both companies. She had successfully deployed AI in her own operations team, and when that produced results, she was asked if she could do the same thing for customer service. Sara had never worked a single day in customer service in her life, yet she said yes.

The Diagnostic

What Sara found when she walked in was not an AI problem. It was not even primarily a technology problem. It was a leadership and infrastructure problem that technology had been asked to solve and couldn't.

The department was fielding roughly 25,000 inquiries per month across two brands. Of the 20,000 monthly phone contacts, 6,000 to 7,000 were going unresolved. The abandonment rate — customers who called and hung up before reaching anyone — had climbed from a historic 10% to 18%, with no explanation offered and no one tracking why. Average hold time had reached 45 minutes or more. A backlog of over 6,500 tickets had accumulated. Chargebacks were rising. The merchant accounts for both companies were under threat of closure — not a hypothetical risk, but an active one.

Underneath the volume problems was something more fundamental: there was no quality assurance process. Nobody was listening to calls. Nobody was reviewing tickets for accuracy or tone. There were no performance standards, no metrics dashboards, no accountability structure. HR was required to attend every team meeting because the

department's leader had made comments serious enough that the meetings could not be left unsupervised.

The technology picture was equally bare. The team was operating on a custom legacy CRM and a custom legacy ticketing system that were incomplete and inconsistently maintained. Their phone system was Five9.

There was no help desk platform, no centralized knowledge base, and no AI. In fact, when Sara went looking for a knowledge base to eventually train an AI system on, she discovered it barely existed. She searched for something as fundamental as the company's refund policy and came up empty.

The diagnosis was clear: you cannot automate a department that has no documented processes, no performance standards, no knowledge infrastructure, and no culture of accountability. The AI deployment everyone wanted was the last step, not the first one. Everything that needed to exist before an AI could function had to be built from scratch.

The Conversion

Sara's first problem was not operational. It was political. She was advised to tell the customer service team that nothing was changing so as not to “rock the boat”. This was the advice she was given to manage a transition in which every single element of the department was being replaced simultaneously: their leader, their team structure, their schedule, their meeting format, their ticketing system, their phone system, their CRM, their performance expectations, and their entire relationship with technology. Everything was changing. She was advised to say nothing was.

Sara didn't follow that advice. As a certified change delivery professional with over a decade in learning and development, she knew better.

She opened the kickoff meeting with the team by being forthcoming that there were going to be some growing pains. She told them she valued their insights and perspectives and would ask a lot of questions before making decisions. She established an open-door policy and procedure and committed to answering every question she could. She told them what was coming, when it was coming, why it was coming, and what resources they would have to get through it. HR attended that first weekly meeting and realized there was no need to ever attend another one.

From that foundation, Sara built the infrastructure the AI would eventually run on. She conducted a full audit of the department, mapped workflows, and did something that had never been done systematically before — she listened to the calls. What she heard was revealing. The customer base for one of the brands skewed older, people managing chronic health conditions who deserved patience and care. What they were

getting fell far short of that standard. The QA process identified who was representing the brands the way they needed to be represented and who wasn't. The team was rebuilt accordingly, going from thirteen to five — not as a cost exercise, but as a quality one.

She implemented a quality assurance program that included call monitoring, CSAT tracking, individual coaching, and corrective action processes. She rebuilt team meetings from the ground up and created an employee handbook retraining program.

In parallel, and simultaneously with all of the above, every technology system the department relied on was replaced. This was not a clean environment getting an upgrade — there were no SOPs, no documentation, no processes to migrate. There was nothing to hand off and nothing to build from.

The legacy CRM and ticketing systems were replaced with Checkout Champ and Zendesk. The Five9 phone system was replaced with Vonage. Each migration required its own rollout plan, its own training, and its own change management. All three happened at the same time, while the department was still taking calls and emails and Sara was still running the department.

Then she built the knowledge base from nothing. Articles, FAQs, refund policies, product information, brand-specific content for both Primal Health and USS Tactical — all of it had to be written, formatted, organized, and loaded into Zendesk before Ada, the AI platform, could be trained on any of it. All of this significant work had to happen before a single AI conversation could go live.

The Ada deployment itself was treated as a project within the project. Sara developed the statement of work, negotiated SLAs, built the training and testing framework, created escalation protocols, and managed a phased rollout that covered both email and voice channels across both brands. She built over 50 workflows and six AI bots. She created a centralized bug and gap tracking system to catch and close issues in real time post-launch.

The Result

Ada resolved 52% of all incoming emails and 32% of voice contacts without human involvement, immediately upon launch. The 6,500-ticket backlog was cleared in five days from go-live. Average hold time dropped from 45+ minutes to under five. CSAT scores increased by more than 150%. The team headcount reduction of 65% generated \$332,000 in annualized savings. HR oversight of team meetings — a standing requirement before Sara arrived — was eliminated after her first meeting with the team.

The person who had been running the department for two years was replaced, and the brands now had a customer service operation that could scale.

What This Case Proves

Most AI implementations fail not because the technology doesn't work, but because the organization deploying it was never ready for it. A department with no documented processes, no knowledge base, no quality standards, and no performance culture cannot be fixed by an AI tool. The AI has nothing to learn from, nothing to enforce, and no infrastructure to plug into. What looks like an AI problem is almost always a people and process problem.

This case also proves something about change management that gets consistently underestimated in operational transformations: being honest with people about what is coming is not a risk — it's the strategy. Sara walked into a department in the middle of the most significant operational overhaul of their careers, and was advised to tell them nothing was changing. She did the opposite. She told them the truth they needed to hear, gave them resources, kept the door open, and earned enough trust in a single meeting to make a long-standing HR concern disappear.

She also did this without any prior experience in customer service. The expertise she brought was not CS domain knowledge. It was the ability to audit an operation, diagnose what was actually broken versus what was being blamed, sequence the work correctly, build the infrastructure the AI required before deploying it, and manage the humans through a change they would naturally resist.

This case works when an organization has a customer-facing operation that is underperforming, a genuine appetite for AI, and the willingness to address the human and process infrastructure before the technology is deployed. It does not work when the goal is the technology and not the outcome. This approach is for organizations that want AI that actually gets results.