ASA

case study

AI Strategy Advisory

Transforming Operational Bottlenecks

After multiple failed vendor pilots and stalled internal initiatives, a SaaS platform in customer success automation turned to ASA to reset and refocus their AI efforts. We delivered a clear roadmap and helped launch a pilot use case that unlocked measurable efficiency—without adding headcount or disrupting core systems.

CHALLENGES

• No Traction from Past Pilots

Vendor-led initiatives lacked clarity and ownership. Internal teams weren't aligned, and no use case had gained traction.

• Ops Bottlenecks Slowing Growth

Support teams were overwhelmed by repetitive inbound tickets, while customer success leadership struggled to prioritize outreach.

• Exec & Employee Frustration

Leadership felt pressure from PE stakeholders with nothing to show for it. Teams were fatigued by shifting priorities and failed rollouts.

• Too Many Tools, Not Enough Outcomes

Multiple platforms (Zendesk, Gong, CRM, internal wiki) weren't integrated. Duplicative efforts drained time and blurred accountability.

TRANSFORMATION STRATEGY

- Ran a discovery sprint with product, ops, and engineering to identify high-friction, high-frequency workflows.
- Prioritized ticket triage automation for pilot based on internal impact and team readiness.
- Delivered build-vs-buy recommendation and supported pilot launch using a GenAI tool layered on top of Zendesk.
- Created an internal success framework and async training to support adoption and enablement.

RESULT

• Ticket Triage Time Cut by 28%

Support agents handled inbound queries faster, with fewer escalations.

• Adoption Across 3 Teams

Product, Ops, and CS shared a single view of pilot performance—building momentum for additional use cases.

• Internal Confidence Restored

Pilot became a credibility moment, helping the team shift from reactive to proactive AI planning.

• Zero Net New Headcount

All gains achieved within existing team structure and tooling.

CONCLUSION

For SaaS teams, clarity and fast traction are everything. This pilot proved that with a focused roadmap and embedded guidance, AI impact is possible—without disruption. Strategy over spray-and-pray wins every time.

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