AI FEATURE DISCOVERY WORKSHOP

Sample Deliverable Excerpt

Illustrative Example — Mid-Market Customer Support SaaS

This is a condensed, illustrative example built around a fictional company for demonstration purposes. Company name, figures, and data shown are not real and do not represent an actual client engagement.

Executive Summary

HelioDesk is a mid-market customer support platform serving roughly 400 B2B companies on a subscription model. Support ticket volume has grown 40% year over year, agent headcount has not kept pace, and first-response times have slipped from a target of 2 hours to an average of 4.2 hours.

Through the AI Feature Discovery Workshop, we identified 4 high-priority AI opportunities across ticket handling, agent productivity, and reporting. Two of these, AI Ticket Triage and Response Drafting, are Quick Wins deployable within 30-45 days using HelioDesk's existing support platform and data. The highest long-term opportunity, a natural-language reporting assistant for CS leadership, is scoped as a Phase 3 initiative.

This document shows a condensed excerpt of the full deliverable: the Feature Prioritization Matrix, ROI Projection, and 90-Day Roadmap. A complete engagement also includes a full Opportunity Catalog, Technical Blueprint, and Developer Scope for each recommended feature.

Feature Prioritization Matrix

Feature	Revenue Impact	Retention Impact	Tech Complexity	Dev Cost	Priority Tier
AI Ticket Triage & Routing	Medium	High	Low	Low	Quick Win
AI Response Drafting for Agents	Medium	High	Medium	Medium	Quick Win
NL Reporting Assistant	High	Medium	Medium	Medium	Strategic Bet
Predictive Churn Alerts	High	High	High	High	Strategic Bet

Quick Wins

AI Ticket Triage & Routing and AI Response Drafting were prioritized for Phase 1 and 2: both address the immediate first-response time problem, both rely on data HelioDesk already collects, and both can be built without new infrastructure.

ROI Projection

Feature	Baseline Metric	Projected Impact	Basis for Estimate	Confidence
AI Ticket Triage & Routing	Avg. first-response time: 4.2 hrs	25-35% reduction	Comparable helpdesk AI-triage benchmarks + HelioDesk's own ticket volume data	Medium
AI Response Drafting	Avg. handle time: 12 min/ticket	15-20% reduction	Pilot data from comparable SaaS support teams of similar size	Medium

Estimates are presented as ranges with a stated confidence level and basis rather than as guarantees, consistent with the actual data HelioDesk has available today.

90-Day Roadmap

Phase	Feature	Description
Phase 1 Month 1	AI Ticket Triage & Routing	Automatically classifies and routes incoming tickets by urgency and topic, cutting time-to-first-response on high-priority issues.
Phase 2 Month 2	AI Response Drafting	Drafts a suggested reply inside the existing agent workflow; agents review and send, reducing average handle time without removing human judgment.
Phase 3 Month 3	NL Reporting Assistant	Lets CS leaders ask plain-language questions of support data (e.g., "which accounts had the most escalations this month") instead of building custom dashboards.

A full engagement produces this same structure built around your product, your data, and your team.

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