



Suhas Bhairav

AI Customer Cancellation and Exit Interview Summary

**Transform cancellations into actionable reasons
with AI-driven summaries and weekly dashboards.**

Turn cancellation notes into structured reasons,
trends, and actions with minimal manual review.

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Data & AI Setup for Cancellations

This page outlines the data sources, automation scope, and guardrails to start. It focuses on CS cancellation narratives and exit notes.

Key move Pilot on the last 6 months of churn notes to validate timing and accuracy

PRACTICAL CHECKLIST

- 01** Ingest cancellation messages, exit survey responses, and account metadata into a single data store.
- 02** Standardize fields with consistent reason codes for pricing, product, onboarding, support, competition, and others.
- 03** Apply NLP to classify each message into top reason categories automatically.
- 04** Generate per-item summaries of key themes to support quick review by CS agents.
- 05** Publish a weekly digest with trendlines by product, tier, and tenure.
- 06** Establish a human-in-the-loop review for low-confidence or high-impact cases.
- 07** Store outputs in the data warehouse with access controls and audit trails.

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Operational AI Playbook

Define roles, data privacy rules, and decision boundaries for CS AI use. Establish a repeatable weekly rhythm for insights and actions.

Key move Establish a weekly risk review to address misclassifications early

PRACTICAL CHECKLIST

- 01** Ownership: CS Ops owns data pipelines; CS leadership approves goals and usage.
- 02** Data requirements: cancellation text, exit notes, ARR, plan, tenure, product; privacy controls in place.
- 03** Automation boundaries: auto-assign high-confidence reasons; flag low-confidence for human review.
- 04** Output artifacts: weekly reasons digest, monthly trends, and recommended retention actions.
- 05** Tools and infra: data lake, NLP model, scheduler, dashboards, and audit logs.
- 06** Measurement and governance: track accuracy, time-to-insight, actions triggered; quarterly policy review.

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Adoption Roadmap & Guardrails

Outline a phased rollout and safety nets to reduce disruption. Focus on small weekly tests and documented approvals.

Key move Document decisions in a living playbook and review weekly

PRACTICAL CHECKLIST

- 01** Week 1: set up data pipeline, run pilot on 25 cancellations, measure accuracy and time-to-insight.
- 02** Week 2: scale to 100-200 notes; deploy auto-summarization; share initial executive digest.
- 03** Week 3: roll out to broader CS teams; start win-back action experiments.
- 04** Privacy and security guardrails: PII masking, access controls, and audit trails.
- 05** Risks and mitigations: misclassification, data drift, over-automation; keep human-in-the-loop for critical cases.
- 06** Approvals and ownership: CS leadership sign-off; IT/CS Ops maintain pipeline and KPIs.

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ABOUT THE CREATOR

Suhas Bhairav

I build AI systems that combine distributed architecture, retrieval, knowledge graphs, security, and practical workflow design. My focus is AI that can be used repeatedly by real teams: understandable, reliable, and grounded in the work people already do.

EXPERTISE

- Principal systems architecture and applied AI engineering
- Production-grade AI systems, agentic workflows, RAG, and knowledge graphs
- Full-stack workflow applications across AWS, Google Cloud, Azure, on-premise, and hybrid environments
- Practical AI implementation patterns for automotive, manufacturing, finance, logistics, cybersecurity, sales, and customer operations
- Security, governance, observability, approvals, and failure-mode thinking for operational AI systems

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