



Suhas Bhairav

AI Enterprise Customer Emergency Playbook Setup

**A pragmatic, beginner-friendly playbook to
auto-triage high-value complaints**

Deliver an automated, human-reviewed emergency plan for high-priority client complaints within minutes.

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Emergency Trigger & Draft Plan

This page describes the automated flow triggered by a high-value client's urgent complaint. It defines what gets automated and what remains human-reviewed.

Key move Always require human review before any customer-facing response.

PRACTICAL CHECKLIST

- 01** Detect high-value complaint based on client tier, keywords, and urgency.
- 02** Create a new incident in CRM with client, issue type, and priority.
- 03** Generate an initial solution plan draft with remediation steps and timelines.
- 04** Assign owner from on-call rotation and notify the executive sponsor.
- 05** Prepare internal notes and a customer-safe draft message skeleton (not sent yet).
- 06** Log all actions for audit and SLA tracking.

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What data and tools are needed

This section lists the data sources, systems, and tools required to automate the emergency playbook. It also notes guardrails for privacy.

Key move Verify data access restrictions before enabling auto-draft generation.

PRACTICAL CHECKLIST

- 01** CRM data: client tier, ARR, purchase history, last contact date.
- 02** Email intake: monitored inbox or ticketing trigger with subject and body.
- 03** AI drafting tool: Claude or ChatGPT with guardrails and prompts.
- 04** Incident record: create tickets in CS platform (Zendesk, Service Cloud).
- 05** Data integration: connectors, API bridges, data mapping, and sync cadence.
- 06** Governance: privacy controls, access rights, audit logs, data retention.
- 07** Security: role-based access, PII minimization, and encryption at rest.

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Weekly rollout plan + example

This page maps a practical 4-week adoption with an enterprise CS example. It shows weekly action items for teams.

Key move Start with one high-value account to validate thresholds.

PRACTICAL CHECKLIST

- 01** Week 1: enable trigger, test AI draft on a sample email.
- 02** Week 2: auto-create incident and assign CS owner upon trigger.
- 03** Week 3: integrate with CRM for logging and executive alerting.
- 04** Week 4: add SLA templates, response time targets, and approval gates.
- 05** Week 5: deploy safety prompts, PII rules, and audit hooks.
- 06** Week 6: scale to additional accounts, document governance, and review metrics.
- 07** Example: Enterprise Acme triggers a major delivery delay; draft plan covers remediation, SLA, and executive update.

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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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