



Suhas Bhairav

AI Support Handoff Template Pack

**Practical templates for seamless AI-human
handoffs in customer support.**

A ready-to-use handoff framework to preserve
context and reduce rework.

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What to automate and what to review

This page defines automation boundaries for customer support and clarifies where humans remain essential. It aligns AI capabilities with agent workflows and policy requirements.

Key move Pilot with low-risk tickets first to learn and adjust

PRACTICAL CHECKLIST

- 01** Automate routine triage, data gathering, and basic responses to common inquiries.
- 02** Route tickets to the appropriate agent, specialist, or external team using AI-driven context.
- 03** Keep decisions on high-risk, policy-laden, or sensitive data with humans for final approval.
- 04** Capture rich context in the handoff payload: ticket history, customer profile, and actions attempted.
- 05** Ensure data privacy and compliance by masking PII where not needed.
- 06** Provide data/tool requirements: TMS or ticketing system, AI model, intents, and templates.
- 07** Define SLAs, workflows, and ownership for every handoff stage.

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Handoff templates by role

Use role-specific templates to preserve context and reduce duplication during transfers. Tailor fields to AI, frontline agents, specialists, managers, and external teams.

Key move Fill mandatory fields before sending; missing data breeds confusion

PRACTICAL CHECKLIST

- 01 AI-to-Agent handoff template includes ticket summary, AI rationale, and recommended next actions.
- 02 Agent-to-Specialist template carries customer history, attempted steps, and escalation reason.
- 03 Specialist-to-Manager template adds impact, risk, and proposed SLA adjustment.
- 04 External-team handoff should include privacy constraints, contact method, and data sharing notes.
- 05 Reopen/follow-up template to summarize results and next steps if unresolved.
- 06 Data fields required per handoff: ticket ID, customer ID, timestamps, owner, status, actions.
- 07 Approval state and audit trail to track handoff decisions.

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Implementation steps & guardrails

This page outlines a weekly rollout plan and governance to ensure safe, measurable adoption. It covers ownership, approvals, metrics, and reviews.

Key move Document approvals; avoid bypassing sign-offs

PRACTICAL CHECKLIST

- 01** Week 1: map current ticket flows and data gaps; assign owners.
- 02** Week 2: train AI on common intents and approve templates.
- 03** Week 3: implement templates in the ticketing system and test end-to-end.
- 04** Week 4: establish escalation rules, approvals, and ownership clear.
- 05** Ongoing: monitor metrics (first response time, handoff accuracy, reopens) and adjust.
- 06** Governance: assign workflow owner per queue; schedule quarterly reviews.
- 07** Risk & guardrails: require human review for policy violations and PII handling.

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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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