



HEPro

Assignment: Workforce Transformation Plan for AI & Automation in Customer Support

Case Scenario

You are the HR Transformation Manager of **ServeWell Outsourcing Pvt. Ltd.**, a third-party customer support service provider for a leading FMCG house. Currently, the company employs **200 staff** to handle calls, emails, and chat support.

Due to advancements in **AI chatbots, RPA (Robotic Process Automation), and voice bots**, the FMCG client has decided to **replace most traditional support operations with AI-driven solutions**. The company has given you **one year** to upskill the existing workforce, hire a few specialized roles, and redesign operations to align with this transformation.

Your task is to create a **comprehensive workforce transformation plan**.

1. Current Workforce Division (200 Employees)

Department/Role	No. of Employees	Current Function
Customer Support Agents (Voice)	100	Handle inbound/outbound calls
Chat & Email Support Agents	60	Manage customer queries via chat/email
Team Leaders / Supervisors	20	Manage teams, handle escalations
Quality Analysts (QA)	10	Monitor performance, audit calls/chats
Training & Development Officers	5	Train agents, onboard new hires
MIS & Reporting Executives	5	Generate client reports, data analysis
Managers (Ops, HR, Admin)	0	Already accounted separately (not part of 200)

2. Transformation Objective

At the end of one year, the organization should:

- Reduce dependency on manual customer support for routine queries.
 - Implement **AI Chatbots, Voice Bots, and RPA tools** for 70–80% of interactions.
 - **Reskill 70% of the existing workforce** into AI-augmented roles.
 - Hire **specialized staff** for AI, data analysis, and bot training.
 - Achieve **cost optimization** while ensuring **customer experience improvement**.
-

3. Future Workforce Vision (Post 1 Year)

Future Role / Department	No. of Employees	Source (Upskilled / New Hire)
AI Bot Trainers & Supervisors	40	Upskilled existing agents
Customer Experience Specialists	30	Upskilled senior support staff
Escalation Support (Human touch)	30	Reduced from 160 frontline staff
Data Analysts (CX, Bot Performance)	15	Mix of upskilled MIS + new hires
Quality & Compliance Managers	10	Upskilled QA + external hire
AI Integration & System Admins	10	New hires (Tech-focused)
Learning & Development Coaches	5	Upskilled trainers
Operations & Project Managers	5	Existing managers
Residual Support Agents (Manual)	20	Retained for non-automated processes
Total	165	Downsized but upgraded

✦ Note: Workforce size reduces from 200 → 165, but overall productivity increases due to automation.

4. Transformation Plan Outline

Phase 1 (Months 1–3): Assessment & Strategy

- Conduct **Skill Gap Analysis** of existing employees.
- Identify roles that can be **upskilled vs. phased out**.
- Partner with EdTech/Training providers for **AI, RPA, Data Analytics** training.
- Create a **Change Communication Plan** to manage employee morale.

Phase 2 (Months 4–6): Upskilling & Pilot Testing

- Launch **Upskilling Program**:
 - Customer agents → Bot Trainers & CX Specialists.
 - MIS Executives → Data Analysts.
 - QA → AI Performance Evaluators.
- Hire **first wave of specialists** (AI system admin, data analysts).
- Run a **pilot bot program** handling 30% of routine queries.

Phase 3 (Months 7–9): Implementation & Transition

- Scale AI bots to handle **50–60% of queries**.
- Redeploy trained staff into new AI-supported roles.
- Identify redundant positions and initiate **outplacement support**.
- Establish **new KPIs**: Bot Accuracy, CX Score, Resolution Time.

Phase 4 (Months 10–12): Optimization & Final Integration

- Bots handle **70–80% queries**, humans handle escalations & experience.
- Fully functional **AI-driven customer support ecosystem**.
- Final hiring for **specialized AI roles**.
- Publish a **transformation outcome report** to stakeholders.

5. Training & Hiring Plan

Upskilling Modules (Internal Workforce)

- **AI & Bot Training (40 hrs)** – NLP basics, bot scripting, escalation handling.
- **Customer Experience (CX) Training (30 hrs)** – Handling complex queries, empathy training.
- **Data Analytics (40 hrs)** – SQL basics, visualization, bot performance tracking.
- **Compliance & Quality (20 hrs)** – AI audit, ethical use of bots.

New Hiring (15–20 people)

- AI System Administrators (5)
 - Data Scientists / Analysts (5)
 - Compliance & Audit Managers (3)
 - Bot Developers / Engineers (2–3)
-

6. Expected Outcomes (Post 1 Year)

- **Cost Reduction:** 25–30% reduction in operational cost.
 - **Automation Coverage:** 70–80% of customer queries handled by bots.
 - **Employee Retention through Reskilling:** 70% workforce transitioned to new roles.
 - **Improved Customer Experience:**
 - Average Resolution Time ↓ 40%
 - Customer Satisfaction Score ↑ 20%
 - **Future-ready Workforce:** AI, data, and CX capabilities embedded in organization.
-

7. Assignment Submission Guidelines

Report Format:

1. Cover Page (Assignment Title, Name, Batch, Date)
2. Executive Summary (1 Page)
3. Current Workforce Division & Analysis
4. Transformation Strategy (Phased Plan)

5. Training & Hiring Plan
6. Future Workforce Vision (with org chart/table)
7. Expected Outcomes & KPIs
8. Annexure (Training modules, Sample KPIs, Communication plan draft)

File Format: PDF or Word

Length: 12–15 pages

Font: Times New Roman, Size 12, Line Spacing 1.5

Deadline: [Insert Date]