



P.AI for after Sales Service



Broad Connectivity ***

Sources	Connection Date	Status
Salesforce	11th Jan 2023	Active
SAP	06th May 2023	Active
ERP	18th Aug 2023	Active
HRMS	23rd Nov 2023	Inactive
Botree	22nd Mar 2024	Inactive



➤➤➤ P. AI : Benefits

● Summarization

Get an assistant that not only analyzes your data but understands it! From giving a birds-eye view to drill-down analysis, get everything at your fingertips. All you need to do is, simply ask

● Advanced search in Natural Language

Ask questions in plain English directly within MS Teams. No more struggling with SQL! Navigate through vast information combining internal, external, and third party data sources



● Activity based nudges

Want a nudge when the bottleneck arises or when your targets are achieved? Sure! Create reminders for your specific needs as and when you want them - set the frequency or based on triggers

● Faster & clear answers

Eliminate time wasted learning SQL or waiting for IT assistance. Minimize misinterpretations with clear, natural language queries and get answers fast

● Democratize Data Assets

Empower everyone, regardless of technical expertise, to unlock the insights hidden in your data. Streamline collaboration, improve communication, and save time.



We scoped the data for customer and agent insights

Data Context

Dataset consists of 8 tables to track data related to customer and agents call and conversion across different touchpoints.

Dataset included:

- Agent Informations
- Customer Informations
- Booleans/Flags, and
- Datetime

Total Files = 8 tables

Agent Informations

Includes information on Agent Name, Team, Agent type etc.

Customer Informations

Includes information on customer name, state, contact id, phone no etc

Booleans/Flags

Includes information on flags for user engagement and behavior across the funnel, etc.

e.g. whether a call is dropped, whether a call is unique or whether a call extends over 30min

Datetime

Includes information on Joining Date, Talk time, End Date, etc.



Sample Queries for Key Areas to leverage from the Dataset



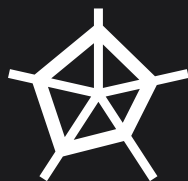
Agent Performance

Who are the top 5 agents with the highest talk time ?
Show agents with over 80% of their time spent on calls.
Which agents are taking the longest breaks?
Compare agents with longest breaks and the % of time they take on calls
What is the average call length by agent type?



Campaign Analysis

What was the total number of calls made in the last 30 days?
Break down call volume by campaign and direction (inbound vs outbound)
Which campaign had the longest average call duration?
Plot call trend by day over the last month.



Conversion Metrics

Which lead source group has the highest conversion rate?
How many leads converted within 7 and 45 days of contact?
Outbound conversion rate for top 5 agents
List top 5 struggling Agents
Which campaign had the highest number of repeat calls?



Customer Insights

Who are our 5 longest customers?
Show customer states with the highest lead volume.
How many unique customers were contacted in Q1 2025?
What's the conversion rate for calls longer than 500 sec?
Which customers contributed to the spike in calls in 7th Jan,2025?



Agent & Team Efficiency

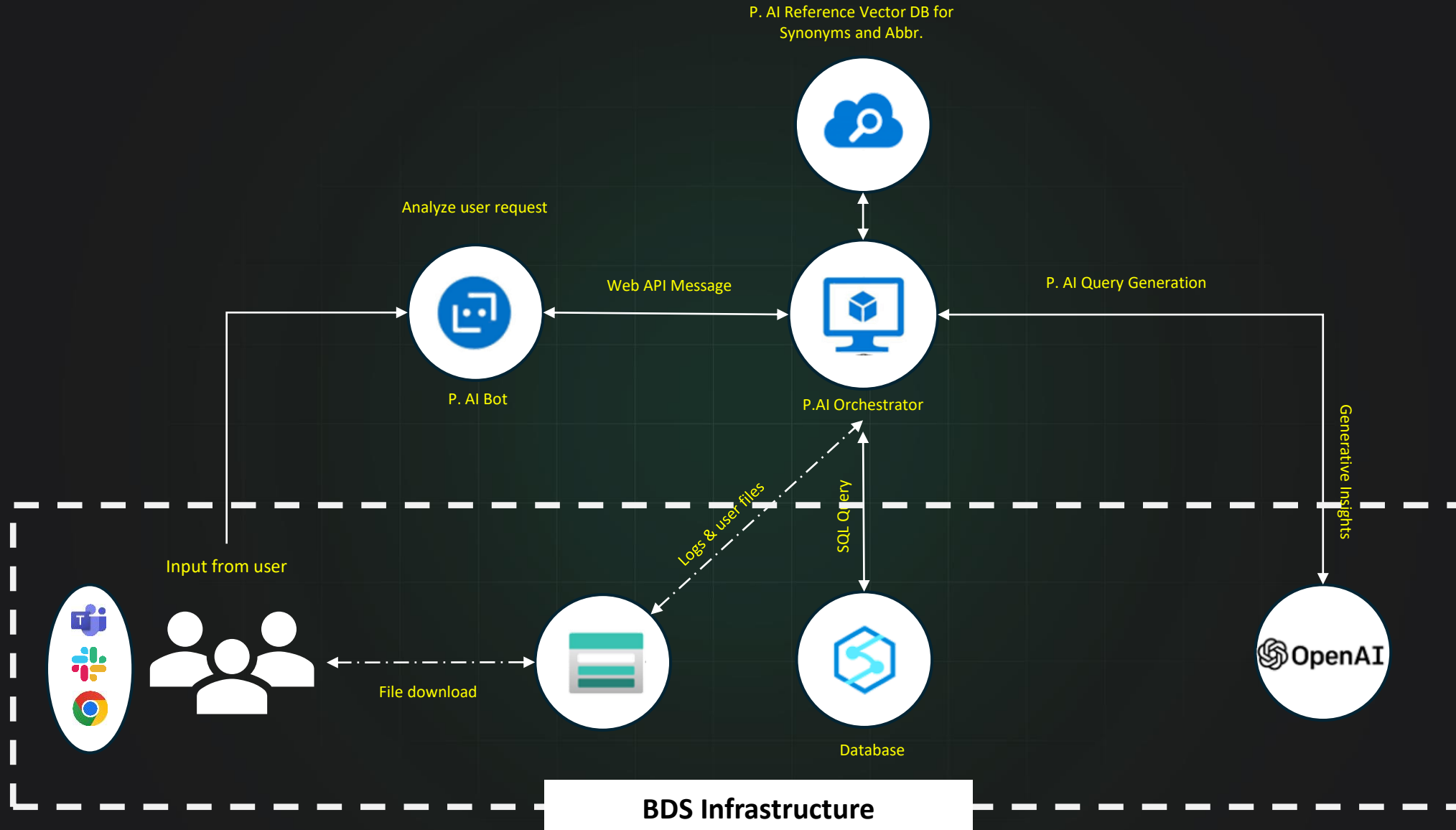
What's the login vs talk time ratio per agent?
Identify agents who logged in but had fewer than 5 calls.
List agents who logged in for more than 8 hours per day.
Which team has the best conversion rate?
How does performance differ between Closer and Others agent types?



Trends and Anomaly

List top 5 agents whose performance is below team average
Show call volume spikes over the previous year
Identify the top 5 agents in conversion rate for the JFM 2025
Find agents who improved conversion rates the most month over month during JFM 2025.

➤➤➤ P. AI : High Level Functional Architecture





Login Credentials and Data Model Explanation:

Data Model

The **Data Model** is focused on **performance tracking** and **conversion analytics** in a customer outreach and debt resolution contact center environment. It supports operational reporting such as **agent productivity** and **call handling**, while also enabling strategic insights into conversion trends and campaign effectiveness. The model leverages common dimensions like **Agent, Customer, Campaign, Lead, Time, Team, Call Direction**, and **Language** to allow flexible slicing across KPIs.



User Today at 1:29 PM

Explain the data model



This data model is focused on performance tracking and conversion analytics in a customer outreach and debt resolution contact center environment.

It supports both operational reporting (agent productivity, call handling) and strategic insights (conversion trends, campaign effectiveness).

****Common Dimensions****

These dimensions provide slicing capabilities across all KPIs:

- Agent
- Customer
- Campaign
- Lead
- Time
- Team
- Call Direction
- Language (English/Spanish)

****Specific Dimensions by Category****

✓ Agent & Call Center Productivity KPIs:



P. AI is a Private LLM with analytical and visualization capabilities trained on organizational data



Integrated in MS Teams (or other productivity tools)
Private LLM with analytics and visualization embedded in your daily tools



Role-Based Security Access
Ensures insights are delivered securely based on user access profiles



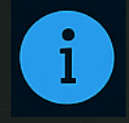
Natural Language Query
Ask questions in plain English and get real-time data responses



Real-Time Data Access
Always up-to-date answers from live datasets — no lag, no extracts



Deployed Under client Firewall
Fully secure deployment behind your network boundaries



Contextual & Granular Insights
Go beyond charts: get metadata-driven explanations with every query

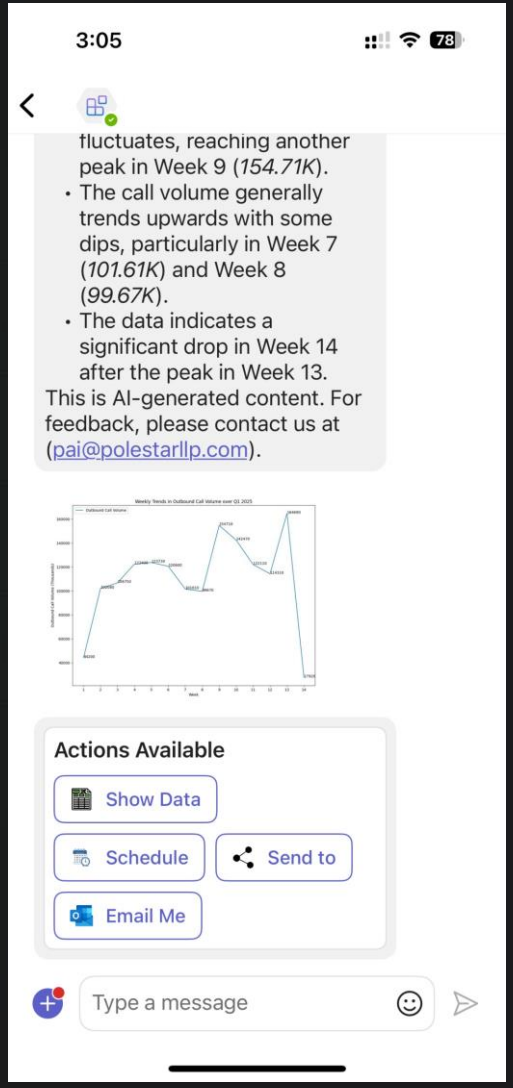
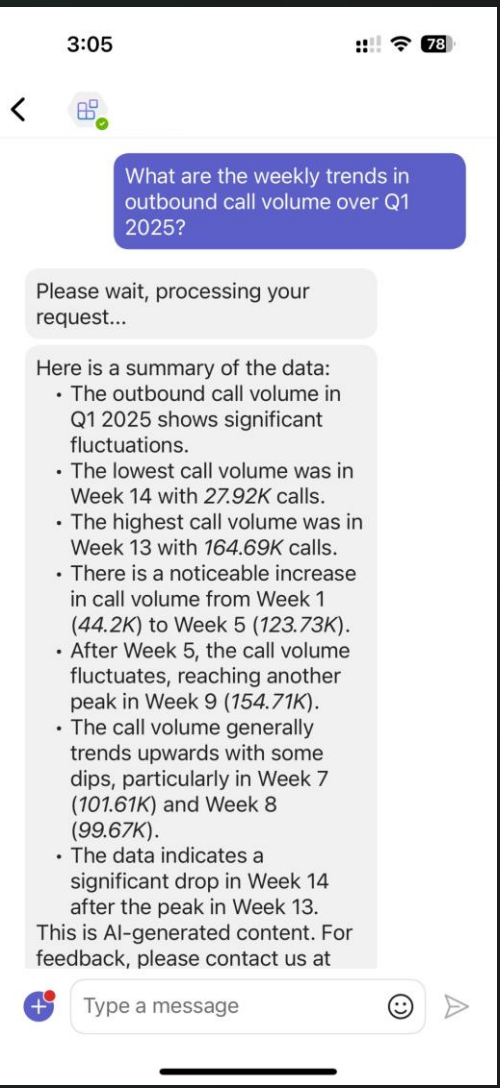


No Training Required
Metadata engine auto-understands the data model — no ramp-up needed



Adaptive Shareable Insight Cards
Automatically generated, shareable, and customizable visual summaries

P.AI will bring insights directly to Organizations — no training, no delays, just answers.



➤➤➤ Why P. AI? How does P. AI compare with PowerBI (w/Co-Pilot)

Feature / Capability	 P. AI	 Power BI (with Co-Pilot)	 Power BI (with Q&A)
 User Interface	Platform agnostic – Lives wherever your teams work – Web, slack, teams)	Tied to Power BI and requires Power BI Premium	Tied to Power BI
 Dependency	Can consume from any Datalake Layer (e.g., Databricks, Fabric, Snowflake, custom etc.)	Currently restricted to Microsoft Fabric	Restricted to Power BI
 Data Access	Sits on Data Layer and can respond to any question contained within the Datalake	Sits on Semantic Layer and works only for that specific Power BI Dashboard	Works only for that specific Power BI dashboard
 LLM Capability	Client preferred LLM (Anthropic, Llama, Open AI etc.) + enterprise context	Currently restricted to work only with OpenAI	Not Applicable

While tools like Copilot and Power BI serve specific functions well, P. AI is purpose-built to deliver secure, real-time, conversational access to enterprise data—making it more adaptable, intuitive, and aligned with cross-functional decision-making needs.



Thank You

