



Customer Experience for the Win: Reduced wait times from 49 to 7 Minutes

A national provider support organization, transformed end-to-end with AI in a HIPAA compliant environment, eliminating friction, improving experiences, slashing costs, and scaling operations without headcount.

83%

Drop in hang-up calls

86%

Reduction in average wait time

60%

Total call containment by AI Agent

20K+

Calls handled per week



Scale & Adoption

- 100% of inbound calls screened by AI.
- Analysis on call type and resolution used for continuous improvement.
- After-hours: ~600 calls nightly handled with zero human staffing
- AI enabled provider portal with natural language interface, serving 1,000 users daily
- 12% call volume reduction after portal launch
- Network spans 400+ health plan types



Technology & Integration

- AI agents integrated with existing telephony (IVR)
- Queue-based call routing — seamless handoff
- DANA agent queries 400+ documents instantly
- AI Call Note Agent eliminates manual note-taking
- Enabled 2X growth in memberships without headcount expansion



Strategic Outcome

- Structural shift — not incremental improvement
- Eliminated wait-time, improving both retention and member satisfaction
- AI-first service model, human interaction reserved for high-value outbound
- AI phone handling at \$0.08-\$0.013 per minute
- Established foundation for enterprise-wide AI automation to support strategic goals



BOTTOM LINE: Faster access. Lower cost. Higher efficiency. Reduced operational burden. At scale.

Case Study #2

Field Operations & Compliance with Copilot

4.5 hrs/week

saved per participant after training

- Expanded Copilot access to 160 additional team members
- Improved scheduling, safety documentation, and vendor communications
- Hands-on workshop aligned operations, estimating, IT, and finance
- Higher confidence and consistency in AI usage across teams



Created momentum for broader adoption across the organization

Case Study #3

Financial Review & Deck Creation with Copilot

9.5/10

post-training survey score

- Faster checklist-based financial package reviews
- Flags missing components for quicker quality control
- Turns images and notes into first-draft presentations
- Reduced repetitive manual work without adding headcount



Validated strong user satisfaction and immediate practical value

Case Study #4

Firm-Wide Copilot Adoption in Legal Services

10/10

post-training survey score

- Demand for Copilot licenses surged after training
- Prompt patterns standardized drafting, summarizing, and communication
- IT and practice leaders aligned on safe-use habits
- Turned early interest into momentum for broader rollout



Built confidence and fluency across attorneys and staff

Case Study #5

Content Library → Customer-Facing Chatbot

400-500

customer inquiries handled monthly by AI Chatbot

- A national chemicals manufacturer had years of product and technical knowledge locked in an extensive content library
- Pisteyo transformed that library into a front-end AI chatbot
- Customers now access real-time answers and commercial request support
- The result became the talk of their industry



Created a real-time customer knowledge experience unmatched in the industry



BOTTOM LINE: Practical AI wins across operations, finance, legal, and customer experience.

Trusted By Industry Leaders & Innovative Disruptors

A selection of organizations Pisteyo has supported across industries.



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Certy Partners is a national wealth management firm with over 1,500 colleagues servicing over 40,000 clients. We partner with Pisteyo to transform how we harness AI — and it has saved us 85% of the time it took to perform tasks like AR reconciliation.
 — Suk Shah, CFO, Certy Partners

“
Pisteyo’s tailored, outcome-focused AI education has transformed our organization. Their approach has unlocked incredible potential within our team, revealing capabilities and intelligence we never realized were there.
 — Greg Sobiech, CEO & Founder, DelveDeeper.com



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