KLARDAGER

CASE STUDY · CUSTOMER SERVICE PARTNER · FULL CASE STUDY

A structured choice gave Workz Academy the right first AI step

Of five assessed use cases, the winner was the one Workz can own outright: an AI mentor for new starters.

Workz recruits and trains customer service advisers for companies that want a partner in customer service. What sets Workz apart from a staffing agency is Workz Academy: six months of training, coaching and quality follow-up for every new adviser. Workz wanted to know how AI could strengthen Workz Academy as the company grows.

After a series of conversations, a review of the operation and a structured assessment of five use cases with the leadership team, Workz Academy Wingman became the first step: an AI mentor that supports new advisers in their everyday work.

Four weeks

From first conversation to recommendation

Five use cases studied, one clear choice.

We then wrote the requirements for how Wingman can be built.

PART 1 The case study

A familiar situation

The first weeks on the phones shape every new customer service adviser. After three to four weeks of structured onboarding, they get coaching and follow-up on site. Being there makes a difference, and clients value it.

That is when the need for support is greatest. The pace is high and many calls come from customers where something has already gone wrong. Just then, a coach is rarely nearby, and around a third of advisers work in security-cleared departments that coaches cannot enter. The more Workz grows, the more people the support has to reach. At the same time, advisers work in clients' systems, where Workz has no say over the technology.

> "After three or four weeks of onboarding, new advisers feel ready. Then they go live with high volumes, a fast pace and high demands, and don't know whether they are doing it right or wrong."

Kajsa Halonen, Head of Recruitment, Workz

How we made the choice

01 **Conversations and a review of the operation**

We walked through the Workz Academy journey with the CEO, operations managers and the recruitment team, from hiring to self-sufficient adviser. The head of recruitment and a recruiter also described what it is like for a new starter to take their first live calls after onboarding. The conversations surfaced many possible use cases for AI.

02 **Five use cases in a structured assessment**

In a workshop, the leadership team assessed the five most relevant against five criteria: business and customer value, time to impact, technical readiness, change to ways of working, and risk and compliance. The group also tested a concept for Workz Academy Wingman that we had sketched.

03 **Recommendation**

The result was a report with a prioritisation matrix, placing each use case by value and feasibility, and a recommended next step.

THE PRIORITISATION MATRIX: FIVE USE CASES BY VALUE AND FEASIBILITY

	Lower feasibility	Higher feasibility
Higher value	**Strategic project** High value, needs more groundwork • AI-supported coaching and quality follow-up in the client's platform • Analysis of recruitment outcomes	**Quick win** High value, feasible now • Workz Academy Wingman: AI mentor for new advisers (recommended first step) • Workz Academy Tracking: the adviser's progress during the Workz Academy period (with reservations)
Lower value	**Low priority** Lower value, needs more groundwork • None of the five	**Avoid for now** Lower value in its current form • Digital assistant in the client's IT environment

Why Wingman won

Wingman scored highest on both value and feasibility. The mentor offers conversational support for difficult customer calls and stress, and direct answers from Workz's own material on procedures and terms. A major factor was that Wingman is the only use case Workz can own outright. The mentor can sit outside clients' systems and follow the adviser through the whole Workz Academy period.

> "We want to support every adviser as much as we possibly can during the first three months, when they are learning the most. Then they get up to speed faster."

Thomas Rogalin, Founder, Workz

What Workz got

01 **A concept for Workz Academy Wingman**
An AI mentor designed around Workz's circumstances, able to follow every new adviser through the whole Workz Academy period.

02 **A rapid evaluation of a new AI-based mentoring system**
The concept was tested as a prototype during the project. In four weeks, Workz knew the idea held up, before anything had to be built for real.

03 **A prioritisation matrix**

All five use cases prioritised, with reasoning.

In Thomas's own words

"Workz should be the partner that makes our clients' customer service better: happier customers, happier employees and more efficient customer service. Workz Academy is what gets us there, and it has to grow with us."

Thomas Rogalin, Founder, Workz

After delivery

We checked the recommendation to go straight to a tightly scoped live version with the leadership team and operations managers. The conversations produced four requirements: the solution must fit the core training as it runs today, work for advisers with different levels of digital confidence, give managers an overview without extra admin and cover more roles than customer service. On that basis, we wrote the requirements for Wingman and mapped out how it could be built, from content and placement to ongoing management.

FACTS	
CLIENT	Workz Sweden AB, a customer service partner with its own training through Workz Academy
SITUATION	Several possible AI investments and limited reach in clients' systems
FROM THE CLIENT	CEO, operations managers, head of recruitment and recruiters
ENGAGEMENT	Structured AI assessment for Workz Academy, March 2026: conversations, workshop, follow-up interviews, prioritisation matrix and recommendation. Followed by requirements for Workz Academy Wingman

OUTCOME

A prioritised use case Workz can own outright and requirements for building it

PART 2 Our analysis

> Klardager's own assessment. This section describes what the choice opens up for Workz and for other organisations in the same situation.

Why the choice matters more now

Customer service is splitting in two. Simple cases are being automated, and the ones left for people are harder and more important. New advisers therefore need to become confident faster, and Workz Academy needs to reach more people at once.

Start where you are in control

Many AI investments get stuck in dependencies: systems someone else owns, contracts that have to change and data that is not shared. Workz chose a use case they control completely, both the content and the development. That shortens the road from decision to impact.

What the first step can lead to

Wingman supports advisers between coaching sessions and leaves the human conversations to the coaches. We see impact in three areas:

Better employee experience. A new adviser gets support straight after a tough call, even when no coach is on hand.

Better customer experience. Clients' customers meet confident advisers earlier in their employment.

Greater efficiency. Advisers become self-sufficient sooner and clients get efficient customer service earlier. That makes them more satisfied and gives Workz new room to grow.

What it means for you in the same situation

01 **As a head of customer service**

Find out what support your new advisers are missing in their first six months.

02

As IT close to the business

Start where the organisation owns the environment. A standalone tool goes live faster than a solution in the core systems. Workplace security rules often decide the form.

03

On the leadership team

Assess the options against the same criteria before you invest. Choose a solution and start with the cheapest, fastest test that can give a real answer, for example a simple prototype a few advisers use in their work. Then build on it in small iterations until you have something that makes a difference and delivers the results you want.

Our conclusion

Most organisations have more possible AI investments than they have time to carry out. Workz got a choice that holds, because every option was tested on the same terms and the winner was a step Workz can own outright.