

REGAL

DESIGNING DELIGHTFUL CUSTOMER EXPERIENCES

CRS EXECS IN THE KNOW 2026



CSAT

(Past 7 days)

97%



AGENDA

01	INTRO	5 min
02	CASE STUDY: NEGOTIATION	20 min
03	CASE STUDY: DISPATCH	20 min
04	RECAP + Q&A	15 min

SESSION FORMAT

1

We share the problem

A real, anonymized deployment — the operational reality a team was facing before AI.

2

We discuss it

What examples have you seen?
What could AI handle, where does a person stay essential, what works for everyone involved?

3

We show you the build

Live in the platform — what was actually built, and how it works.

A NATIONWIDE MARKETPLACE THAT MATCHES AND NEGOTIATES JOBS

A request from a consumer comes in. Somewhere in a network of contractors is someone available and qualified to take it. Finding them, negotiating the price, and matching them back to the job: all of it happens by phone from a human team.

- Contractors don't respond to a first text — staff has to follow up by phone to get a real answer
- Each rep tops out around 15-20 calls an hour; hard-to-fill jobs get skipped for easy ones
- Price gets negotiated live, call by call — contractors compare notes, so terms have to stay consistent
- Once a contractor agrees, they still have to get matched back to the original request without anything getting lost

Success: The job is done when the contractor is priced, agreed, and matched back to the request.

QUESTIONS

- 1. HOW WOULD YOU DESIGN THIS?**
- 2. WHAT COULD AI HANDLE?**
- 3. WHERE DOES A PERSON STAY ESSENTIAL?**
- 4. HOW CAN YOU MAKE THIS A GOOD AND EFFICIENT EXPERIENCE?**
- 5. BE PREPARED TO REPORT BACK A HIGH LEVEL DESCRIPTION OF YOUR CUSTOMER JOURNEY**

HERE'S WHAT WE BUILT

Live in the platform

Outbound reach that doesn't wait for a callback — AI calls the contractor immediately instead of sitting in a queue for a rep to get to it.

Live negotiation with randomized logic — AI negotiates the price on the call in real time, moving within guardrails using randomized logic so contractors can't learn the pattern and game the system.

Structured capture of the agreed terms — Once the contractor agrees, price and job details are captured cleanly, not left in a call recording someone has to re-listen to.

Automatic match-back to the original request — The agreed job ties back to the consumer's request without a manual handoff step.

Escalation when it stalls — If the contractor won't move or the negotiation gets stuck, it hands to a person instead of forcing the AI to close it anyway.

A NATIONAL ROADSIDE NETWORK THAT VERIFIES AND DISPATCHES HELP

A driver calls in stranded on the side of the highway: locked out, out of gas, a dead battery, or waiting on a tow. Somewhere in a network of providers is someone available and equipped to help. Verifying coverage, locating the driver, and dispatching the right provider. All of it happens by phone by a human team

- Policy verification fails often enough that it kicks to a human — coverage details don't always match what's on file
- Drivers give incomplete or wrong location details, especially mid-breakdown when they're stressed
- Providers have to be matched by real-time availability and distance, not just whoever's next on a list
- Reps spend the first few minutes on intake before the actual dispatch decision even starts

Success: The job is done when the provider is verified, the driver is located, and help is dispatched.

IN YOUR GROUPS

- 1. HOW WOULD YOU DESIGN THIS?**
- 2. WHAT COULD AI HANDLE?**
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HERE'S WHAT WE BUILT

Live in the platform

Verification that adapts to imperfect data — If policy details don't match exactly, it can still confirm coverage instead of defaulting straight to a human.

Location capture that doesn't rely on the driver being precise — Pulls from device or app data as a fallback when a stressed driver can't describe exactly where they are.

Real-time matching by availability and distance — Dispatches the provider who can actually get there fastest, not just whoever's next in the queue.

Streamlined intake — Collects what's needed for dispatch without the multi-minute Q&A before the real decision gets made.

Context-preserving handoff when it escalates — If it does kick to a person, they pick up with full context instead of the driver starting over.

REVERSE YOUR INSTINCT

MORE STRAIGHTFORWARD USE CASES

- FAQ & status checks
- Simpler scheduling use cases
- Reminders

COMPLEX USE CASES

- Negotiation
- Urgent, high-stakes calls
- Judgment calls

Challenge your team to start with the harder use cases first to prove them out

QUESTIONS?

KEEP THE CONVERSATION GOING

Visit Regal at the Innovations Lab

Thursday, October 1 • 4:00–5:30 PM

See a personalized live demo and learn more about our platform

REGAL