Case Studies

AI-assisted request drafting

Current role · five brands · approximately 750 locations

Situation. Each loosely worded request required rebuilding intake checks, business rules and data files by hand.

Approach. Documented company standards, brand facts and recurring request patterns. Built an AI-assisted process that uses specifications, descriptions and source data to create data-work files and vendor requests. Missing information becomes a question; drafts pass the Definition of Done, leader approval and the standard audit.

Outcome. Used for four brandwide price changes and the largest annual holiday gift-card promotion, saving an estimated week of work in one month. Preparation shifted toward reviewing and approving; the underlying documentation also trains new team members.

300K-record billing migration

CorePower Yoga · 2015–2021 · approximately 10,000 interactions per week

Situation. Customer billing moved to new database software while the support team continued daily operations.

Approach. Consulted on software customization and managed migration of more than 300,000 billing records. Applied the approach to data and membership transitions for four acquired locations, leading the team through customer-facing changes.

Outcome. Billing moved to the new system while support remained operational, with a reusable approach for later acquisitions.

E-commerce launch and team readiness

CorePower Yoga · team of 35, including five managers

Situation. A new e-commerce platform introduced chatbot and live chat channels; the team needed to be ready at launch.

Approach. Directed the customer experience workstream, wrote chatbot and live-chat scripts, and trained the team. Built on experience leading customer service and billing implementation for an on-demand video launch, recognized with the Team Player award.

Outcome. Support launched with documented scripts and trained staff; the playbook carried forward to later rollouts.