VISION & SCOPE · SAPPY BY PGC DIGITAL

Vision & Scope
Sappy Experience Platform

From guided navigation to autonomous communication for business users, in four releases with people in charge. Dates and targets are indicative and to be agreed.



People. Possibility. Progress. · Sappy name and character: IP registration in progress

Vision & Scope — Sappy Experience Platform

19 October 2026 · Prepared by Vinod Kumar Beli, Chairman and Managing Director, PGC Digital

The Sappy Experience Platform gives every business user one guide, Sappy, that moves from guided navigation to autonomous routine communication in four releases, with people in charge at every step. Roadmap dates and targets in this document are indicative and to be agreed.

Vision statement

Every business user has a guide that knows where things are, explains them in plain words, and handles the routine so people can focus on customers.

Every great transformation begins with a possibility. Sappy, the hero mascot of PGC Digital, is the face of that possibility: intelligence, ambition, collaboration and progress, carried from India to the world. The Sappy Experience Platform turns that character into a working guide across every channel, built data first, AI-powered, with SAP at the core.

Sappy by PGC Digital — People. Possibility. Progress.

The problem

Business users lose time finding information and typing routine messages, and customers feel the delay.

- **Too many places to look.** One customer question, such as order status or an open invoice, means several screens across CRM, ERP, email and chat.
- **Routine work done by hand.** Confirmations, reminders and status updates are typed again and again.
- **Knowledge in a few heads.** New joiners depend on experienced colleagues to know where things are.
- **Inconsistent experience.** Websites, proposals, email and support each look and sound different.
- **AI without trust.** Teams want AI help but worry about wrong answers, data leaks and loss of control.

Business objectives and success measures

Five objectives, each with a measure; the target values are set from the baseline measured in Discover and agreed with each process owner.

Objective	Success measure	Target
Faster answers for business users	Time to find a record or answer a customer question	[To agree, vs baseline]

Objective	Success measure	Target
Less manual routine communication	Share of routine messages drafted or sent by Sappy	[To agree, per message type]
Faster customer response	Time from customer question to reply	[To agree]
Quicker onboarding	Time for a new joiner to work without help	[To agree]
Trusted AI	Drafts approved without material edits; escalations handled on time; zero data-policy breaches	[To agree]

Adoption (weekly active users per role) is tracked for every release.

Personas: business users

Seven personas define the scope; each gets help at every level, from guidance to routine messages handled for them.

Persona	Works in	Biggest daily pain	What Sappy does for them
Sales representative	SAP Sales Cloud V2, email, mobile	Preparing for visits and chasing quotes	Meeting briefs, quote follow-up drafts, next-best action
Inside sales	SAP Sales Cloud V2, phone, email	Qualifying many leads fast	Lead summaries, call notes, routed follow-ups
Customer service agent	SAP Service Cloud V2, email, WhatsApp	Finding case history and order data	Case summaries, suggested replies, status updates
Order desk	SAP S/4HANA, email	Order-status and delivery questions	Order lookup, confirmation and delay messages
Finance / accounts receivable	SAP S/4HANA, email	Payment reminders and disputes	Reminder drafts, dispute summaries, routine reminders sent
Plant / procurement buyer (customer side)	Portal, email, WhatsApp	Getting answers without calling	Self-service status, documents, guided requests
CEO / CIO	Dashboards, email	Seeing value and risk	Adoption and quality dashboards, guardrail reports



Sappy marks what matters

A message type only moves up a level when the data and the process owner say it is ready.

The four autonomy levels and scope per release

Each release adds one level of help; a message type only moves up when the data and the process owner say it is ready.

Release	Level	In scope	Out of scope
R1	Guide	Guided navigation on the website (live today as "Ask Sappy" and the guided journey); question flows to the right record, screen, report or form; the same Sappy look in every channel	Free-text AI answers; any action in customer systems
R2	Assist	Answers grounded on role-permitted data; summaries of uploaded RFPs and documents; drafts of emails and meeting briefs that the user sends	Sending anything on the user's behalf; changing records
R3	Co-pilot	Actions prepared in SAP Sales & Service Cloud V2, SAP S/4HANA, email and WhatsApp (quote follow-up, order-status reply, payment reminder, meeting invite); one-tap human approval	Unapproved sends; pricing, discounts, credit or contract changes
R4	Autonomous within guardrails	Routine, policy-bounded messages sent on their own (status updates, reminders, scheduling, acknowledgements) with audit trail, confidence thresholds, escalation to a named person and kill switch	Exceptions, complaints and anything commercial: these stay with people

Touchpoints: one seamless experience

The same character, the same voice and the same next step wherever a customer or user meets PGC Digital.

Touchpoint	What Sappy does there	Next step it offers
Website	Ask Sappy and the guided journey take visitors to the right service, case study or form	Book a conversation or start an assessment
WhatsApp	Answers common questions and shares the right page or document	Hand over to a named person
Email signature	Recognisable Sappy avatar and sign-off on every email	Visit the Meet Sappy page
LinkedIn	Banner, posts and stories carry the same character and lines	Read the blog or follow
Sales and pitch decks	Sappy marks the one message per slide that matters	Agree the next meeting
RFP responses	Sappy guides the evaluator through the response	Shortlist and orals

Touchpoint	What Sappy does there	Next step it offers
Vision & Scope and proposals	Sappy marks decisions and open questions	Sign-off
Delivery and support portal	Sappy shows status, answers questions and routes requests	Approve, escalate or close

Guardrails and responsible AI

People own every outcome; Sappy only acts where a rule allows it, and every action can be traced and reversed.

- **Human ownership.** Pricing, discounts, credit, contracts, complaints and exceptions always go to a person.
- **Explainability.** Every answer and draft shows its sources; every autonomous send records the rule that allowed it.
- **Data stays in the customer's tenant.** No customer data is used to train public models.
- **Role-based access.** Sappy sees and says only what the user is allowed to see.
- **Logging.** Every prompt, draft, approval and send is logged and kept per the customer's retention policy.
- **Confidence thresholds and escalation.** Below the agreed level, Sappy hands over to a named person.
- **Kill switch.** Any message type can return to approval mode at once.
- **Opt-out.** Customers and users can opt out of automated messages.
- **Quality review.** An AI review board approves every change in autonomy level.

Dependencies, assumptions and risks

The releases depend on licences, data access and named process owners being in place before Build starts.

Dependencies

- SAP Sales & Service Cloud V2, SAP S/4HANA, SAP BTP and AI service licences for the chosen use cases.
- API and event access to orders, deliveries, invoices, cases and contacts.
- WhatsApp Business and email platforms for external channels.
- Identity provider integration for single sign-on and roles.
- Approved original Sappy artwork; Sappy name and character IP registration is in progress.

Assumptions

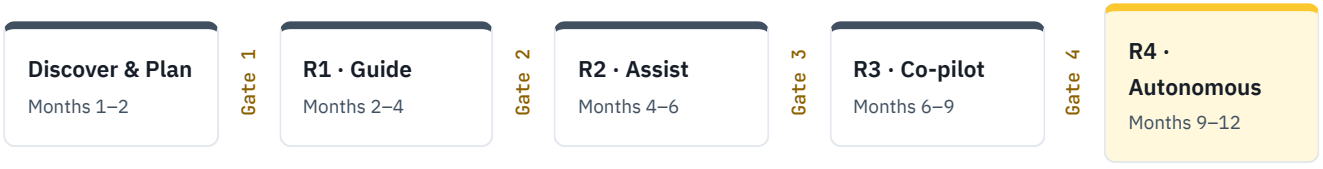
- Each persona group names a process owner who approves flows and autonomy levels.
- Master data is good enough for pilot scope, or a clean-up is planned.
- Security and legal review the guardrail policy before R3.

Risks

Risk	Effect	Mitigation
Poor data quality	Wrong answers, lost trust	Data checks in Discover; sources shown with every answer
Low adoption	Benefits not realised	Champions, in-flow help, adoption dashboard
Wrong or unsuitable AI output	Customer impact	Grounding, thresholds, approval until proven
Licence or access delays	Release slips	Confirm before Build; plan around what is available
Brand or IP clearance delays	Character use limited externally	Track registration; use approved art only
Regulatory review of automated messages	Rollout paused	Early engagement, logs, opt-outs

Roadmap (indicative)

Four releases over about 12 months, each opened only by a go/no-go gate; the real plan is set at the end of Discover.



Indicative roadmap · 5 phases, 4 go/no-go gates

After R4 the platform grows to more users, countries and message types, raising autonomy only where the data supports it.

Governance and sign-off

This Vision & Scope is approved when the five roles below sign; any later change in scope or autonomy level goes back through the AI review board.

Role	Name	Decision	Date
Executive sponsor	[Name]	[Approved / Changes needed]	[Date]

Role	Name	Decision	Date
Business process owner(s)	[Name]	[Approved / Changes needed]	[Date]
IT / enterprise architecture	[Name]	[Approved / Changes needed]	[Date]
Security and data protection	[Name]	[Approved / Changes needed]	[Date]
PGC Digital engagement director	[Name]	[Approved / Changes needed]	[Date]

Forums: weekly project status; a go/no-go review at every release gate; a monthly steering committee; the AI review board for autonomy changes.



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