

# From Proposal to Production: Building AI Infrastructure Without Permission

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## 87%

Reduction in QBR prep time  
2 hrs → 15 min per session

## 24

Enterprise accounts under  
active portfolio intelligence

## 3

Renewal accounts in active  
pipeline via Whitespace Radar

### WHAT WAS BUILT

Designed, coded, and deployed a multi-module CS Intelligence Suite to production — without a budget, without admin system access, and concurrent with full management of a 24-account enterprise portfolio. Two tools are live on Netlify. The suite replaces manual, fragmented workflows with a unified intelligence layer built specifically for the team's book of business.

#### Portfolio Board

Real-time health, adoption, renewal, and whitespace tracking across all 24 enterprise accounts.

#### Whitespace Radar

Algorithmic upsell signal scoring — health + documented gap + adoption = ranked expansion priority list.

#### CSQL Pipeline + AE Handoff

CS-originated revenue tracking with attribution logic and auto-generated structured handoff notes for AEs.

#### Salesforce Attribution Fix

Interim workaround + custom field framework to surface CS-sourced pipeline invisible in existing reporting.

### WHO IT SERVES

Built initially to close the gap left by institutional resistance to the broader AI initiative — subsequently adopted by the CS Director and tech-forward teammates. The CSQL pipeline serves a dual function: tracking CSM-originated expansion opportunities alongside Sales-sourced volume, creating the first structured CS revenue attribution layer the team has had.

Enterprise CSMs

CS Director

AE handoff workflow

Leadership reporting

### MEASURABLE IMPACT

#### 87% time reduction — QBR prep

Dropped from 2 hours to 15 minutes per session; under 5 min in urgent scenarios — freeing material weekly capacity.

#### 3 renewal accounts in expansion pipeline

Identified via Whitespace Radar signals — structured expansion conversations initiated where none previously existed.

#### First CS revenue attribution layer

Designed a Salesforce workaround and custom field framework that makes CS-sourced pipeline visible for the first time.

#### 5-tier AI curriculum designed & approved

Company-specific adoption framework with anchor deliverables at each tier, structured for phased organizational rollout.

### CONTEXT & CONSTRAINTS

This initiative was self-initiated following the SKO Conference, formally pitched to CS leadership, and approved with significant institutional guardrails — a regulated payments environment with compliance, data security, and shadow AI concerns at every layer. Everything built and deployed exists within those constraints. The architecture is designed to be extensible: what runs on a 24-account book today is a blueprint for broader CS and cross-functional deployment.