GOCCELERATE™ · D07

Communication Message Drafts

[redacted]

Prepared for: Named Senders (Sponsor, HR, OCM Lead) | Initiative: [redacted] | Assessment Date: [redacted]

Tone calibration for this draft set: Transparent/Honest is the dominant register, blended with Empathetic/Supportive throughout, per the organization's selected communication tone.

DRAFT 1 — SPONSOR ANNOUNCEMENT

To: All Consumer & Business Banking contact center, branch service, HR/People Org, Legal & Compliance, and IT colleagues

From: [redacted] EVP & Head of Consumer & Business Banking Operations

Subject: [redacted] is coming to your team — here's what it is and what it means for your job

Channel: Email, intranet, video | Timing: Week 1 — before any other employee-facing communication

Team,

I want to tell you directly about a change coming to how we serve our customers, and I want to start with the question I know is on your mind.

We are rolling out [redacted], a new AI tool that will draft call summaries, suggest next steps and required disclosures in real time, and handle the documentation you currently type manually after every customer interaction. It is being built into our contact center and branch service platforms over the next several months.

Here is the direct answer to the question I know you're asking: this rollout does not eliminate positions in our contact centers or branch service teams. I know some of you have seen reports of AI reducing headcount at other companies, and I'm not going to pretend that concern is unreasonable — it's a real conversation happening across our industry. But I want to be specific about what is and isn't happening here: no one in this population is losing their job because of [redacted].

I do want to be honest that this change is bigger for one group specifically. Our back-office documentation and reconciliation team — about 350 colleagues — will see their current work substantially automated. Those colleagues are being redeployed into expanded servicing roles, with their pay and title protected. I know "redeployed" can sound like a soft word for something harder, so let me be plain: this is a real transition, and we owe that team real support through it, which is what our HR partners are building right now.

Why are we doing this, and why now? Our contact volume has grown faster than our staffing, average handle time has climbed for two years running, and a recent compliance exam flagged inconsistencies in how we document customer disclosures. [redacted] is built to fix both problems at once — faster documentation, and more consistent compliance capture.

Over the next several weeks, you'll hear more from your managers, from me, and through team briefings about what this means for your specific role and when your team's training begins. If you have questions before then, my team has set up channels for that — details are on the intranet page linked below.

I know changes like this land differently depending on where you sit, and I intend to stay visible and direct with you throughout this rollout, not just today.

[redacted]

DRAFT 2 — MANAGER PRE-BRIEFING

> To: People Managers — Contact Center Team Leads, Branch Service Supervisors, HR/People Org Team Leads
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> From: [redacted] and C&BB HR Business Partner team
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> Subject: Preparing you to lead [redacted] conversations with your team
>
> Channel: Email + manager Teams channel | Timing: 24–48 hours before the Sponsor Announcement

You're getting this before your team does because you are the most important communication channel in this rollout — more than any email from me, more than any intranet page. What you say, and how you say it, will shape how your team reacts more than anything else in this plan.

What's happening: We're rolling out [redacted], an AI copilot for documentation and next-best-action support in the contact center and branch service platforms. The companywide announcement goes out in the next 24–48 hours. Your team will likely have already heard something vague from the earlier all-hands reference to "AI-enabled service tools" — this is the specific announcement.

What your team will likely ask you: "Is this going to replace my job?" · "Is my performance going to be judged against what the AI suggests?" · "If the AI gets something wrong on a call, is that on me?"

What you are authorized to say: the rationale for why this is happening, the timeline and key milestones, and what will and won't change for each person on your team. It is also fully acceptable to say "I don't know yet" — that is an honest and authorized answer, not a failure.

What we need from you immediately: Schedule a short team conversation this week, before the training rollout reaches your site. Be visible and available — don't let this be an email your team reads alone. Listen before you message; you'll hear real concerns that we need to know about.

Where to escalate: Any question you can't answer, or any resistance that feels bigger than a normal question, goes to your HR Business Partner or directly to the OCM Program Lead — details in the attached contact sheet.

We know this is a lot to carry, especially with your own team's workload. We're building a Manager Enablement Kit specifically so you're not doing this without a script — that's coming to you before your team's training window opens.

DRAFT 3 — CHANGE OVERVIEW COMMUNICATION

> To: All impacted colleagues — Operations/Production, HR/People Org, Legal & Compliance, IT
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> From: OCM Program Lead, C&BB Transformation Office
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> Subject: What's actually changing with [redacted], and what happens next
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> Channel: Email + intranet | Timing: Week 1–2, following the Sponsor Announcement

Following [redacted] announcement last week, here's what [redacted] actually changes about your day-to-day work.

What's changing: Instead of manually typing case notes and documentation after every customer interaction, [redacted] will draft a summary and next-step recommendation for you in real time. You review it, correct anything that's off, and confirm it — you're not typing from a blank page anymore, but you're also not stepping back and letting the AI run unsupervised.

We know some of you are wondering whether this data is being used to score your individual performance. Here's what we can tell you now: the specific metrics and thresholds for how AI-assisted interactions factor into performance reviews are still being finalized by our Total Rewards team, and we will not communicate anything about performance measurement until that's confirmed. We're telling you this is unresolved rather than pretending it isn't a question.

What's in it for you, practically: based on our pilot data, this should meaningfully cut down the four to six minutes you currently spend on after-call documentation, give you real-time compliance guidance during complex disclosures, and shift more of your time toward the parts of a customer call that actually need a person.

What happens next: your site's training window will be communicated by your manager 2–3 weeks before it starts. Training runs in a phased schedule across our four site groups over the next six weeks. Before the tool goes live for your team, you'll have a two-week period where [redacted] runs in the background without affecting customers, so you can get comfortable with it first.

Questions: reach out through your team's Teams channel or the dedicated [redacted] feedback inbox — both are linked below. We're reviewing these weekly and will keep updating the FAQ as real questions come in.

DRAFT 4 — TRAINING LAUNCH COMMUNICATION

To: Contact center/branch service colleagues, team leads, QA/compliance analysts, redeployed HR/People Org colleagues (per cohort)

From: L&D Team, in partnership with Change Champions

Subject: Your [redacted] training starts [Training Date Range] — here's what to expect

Channel: Email + manager cascade | Timing: 2–3 weeks before training launch date

Your site is up next for [redacted] training, running [Training Date Range].

This training is designed to help you work confidently alongside [redacted]. You'll learn what the tool does, what it does not do, how to evaluate its outputs critically, and who to contact when something doesn't look right. Because this is our first major AI rollout, everyone starts with a short foundational AI literacy session before we get into tool-specific training — this isn't optional pre-work, it's the first module.

Who needs to complete it: all contact center and branch phone-service colleagues, team leads and supervisors, QA/compliance monitoring analysts, and colleagues transitioning from the back-office documentation team.

⚠ COMPLIANCE DEADLINE

Because this training also covers required disclosure and documentation compliance requirements, completion is mandatory. Colleagues who do not complete the required compliance training by the end of your site's training window will not be authorized to use [redacted] in live customer interactions after go-live. Please do not delay registration.

Format: a mix of eLearning modules, live workshops, hands-on practice, and manager-led coaching — access and registration instructions are at [Registration Link]. After training, you'll have a two-week window where the tool runs in observation mode only, before it's active on live calls.

After training: post-launch support runs for three to four weeks after your site goes live, plus an ongoing peer champion network at your site.

Questions before your session? Reach your team lead or the dedicated training inbox linked above.

DRAFT 5 — GO-LIVE READINESS COMMUNICATION

To: All impacted colleagues

From: [redacted] / OCM Program Lead

Subject: [redacted] goes live for your team on [Go-Live Date] — what to know

Channel: Email + intranet | Timing: 5–7 business days before go-live

[redacted] goes live for customer-facing use at your site on [Go-Live Date].

What changes that day: [redacted] moves from observation mode into active use — its drafted summaries and next-best-action prompts will now be part of your live workflow, and you'll be reviewing and confirming them in real time rather than practicing on non-customer interactions.

Support available: a dedicated support channel and peer champion network are active at your site starting go-live day. Your team lead has the escalation contact list if something isn't working as expected.

If something doesn't work: don't work around it quietly — flag it through the support channel or to your team lead the same day. We'd rather hear about a problem on day one than find out at day thirty that people have been manually re-doing work to avoid the tool.

Your site has completed the training and shadow-mode requirements to be ready for this. We know this is a real adjustment, and we'll be watching how it's going closely in the first weeks.

DRAFT 6 — 30-DAY PULSE UPDATE

To: All impacted colleagues
From: [redacted] / OCM Program Lead
Subject: 30 days in — an honest update on how [redacted] is going
Channel: Email + intranet | Timing: 30 days post go-live

Thirty days in, we know this transition has not been easy for everyone. That is expected — and it is important to us that we address it directly rather than tell you everything is going smoothly if it isn't.

Here's where things stand: [documentation time and compliance-review results to be inserted from the 30-day pulse survey and QA sampling]. Some sites and teams are adapting faster than others, and we're not going to pretend the pace has been uniform.

We heard specific things from our champion network and feedback channels, and here's what we're doing about them: [specific actions drawn from actual 30-day feedback themes — to be finalized once pulse data is in].

What's next: our 60-day check-in will look specifically at whether AI-drafted disclosures are being reviewed rather than accepted automatically, and we're adding additional coaching support for any team that's struggling more than others.

If you still have questions or concerns, the feedback channels from day one are still open, and your champions are still your first point of contact.

MANAGER TALKING POINTS

The Question	What to Say	What NOT to Say
Why are we doing this?	Our contact volume has grown without matching staffing, and a recent compliance exam flagged inconsistent	"Corporate wants this" or any answer that doesn't name the actual business

The Question	What to Say	What NOT to Say
	documentation. This tool is built to fix both at once.	reason
Why now?	The compliance finding and rising cost-to-serve made this a priority this year, not something we could keep deferring.	"I don't know why now" without following up to find out
What does this mean for my job?	It changes how you document interactions — the AI drafts it, you review and confirm it. It does not eliminate your position.	"Nothing will change" (false certainty) or "you'll get used to it" (dismissive)
Will this AI replace people?	No one in our contact center or branch service population is losing their job because of this rollout. I know that's the real question — that's the direct answer.	Deflecting to "that's above my pay grade" or avoiding the question
What if I don't think this is a good idea?	You don't have to be excited about it to do your part well. I want to hear your specific concerns — bring them to me.	"This isn't a big deal" or dismissing the concern
What if I'm not ready by go-live?	That's exactly what the shadow-mode period and post-launch support are for. Come to me if you're behind — we'll get you support, not a penalty.	Implying there's no flexibility or support available
What happens if something breaks or the AI is wrong?	Flag it the same day through the support channel. You're not expected to just work around it quietly.	Suggesting employees should just "figure it out"
Who do I go to with problems?	Me first, then the OCM feedback channel if it's bigger than I can answer.	Leaving this unanswered or vague
What exactly is changing in my role? (redeployment team)	Your specific new role and responsibilities are [to be confirmed per individual placement] — pay and title are protected through this transition.	Vague reassurance without specifics once placements are known

DRAFTING NOTES

Employee concerns raised during early listening sessions — monitoring data usage and whether the redeployment signals broader cuts — were provided and have been addressed directly in Drafts 1 and 3 rather than left as placeholders. The WIIFM content in Draft 3 (time savings, real-time compliance guidance) is grounded in the stated employee benefits and does not require additional validation, though the exact time-savings figure should be confirmed against pilot data before this draft is finalized. The restricted-topic constraint (unfinalized performance-metric thresholds) is respected throughout — Draft 3 explicitly names the topic as unresolved rather than omitting it silently, which is the stronger trust-building choice given the active algorithmic-accountability concern. Recommended review sequence: Legal/Compliance and Corporate Communications review

Drafts 1 and 2 first given the job-security and manager-authorization content, followed by HR review of any redeployment-specific language, then standard approval for Drafts 3 through 6.

Prepared by GOccelerate™ | [redacted] | Confidence: Very High (100%)