



00

When SaaS Stops Scaling

How a US travel booking platform supporting 20+ casino partners replaced a generic service desk with a business-aware operations platform and human-controlled AI.

Behind the Build #01 · Systems Case Study · A JavaScript/React custom application

LEAD SCALE PROOF

20+

CASINO PARTNERS
supported in production

CONTEXT

Account and booking data

Records sit next to every conversation.

CONTROL

Human approval by design

AI drafts with real data. A person sends.

OWNERSHIP

Channels mapped in-house

Email and SMS live in the platform, not a vendor.

Hill Tribe Solutions

Custom Software & AI Development Agency

Client identity anonymized as a travel booking platform.

01

The Situation

OVERVIEW

The help desk knew the message. It did not know the customer.

The conversation was visible. The customer story was not. Every support ticket began with a context reconstruction problem the business had already solved elsewhere.

WHAT THE SERVICE DESK SAW

A message

The rep could read what the customer wrote, but not the records needed to resolve it.

CONVERSATION WITHOUT CONTEXT

WHAT THE REP ACTUALLY NEEDED

Account Who is this?

Certificate What expires, and when?

Booking What is already in motion?

History What happened before?

THE HIDDEN WORKFLOW INSIDE EVERY TICKET

01

Open ticket

02

Identify
customer

03

Find
certificate

04

Check
booking

05

Draft and
follow up

Duplicate conversations added another layer of ambiguity. And because each conversation could become a booking, fragmented support also meant fragmented lead management.

THE OPERATING INSIGHT

The tool was not missing a feature. It was sitting at the wrong layer.

02

The Strategic Call

OVERVIEW

Change the center of gravity.

Instead of forcing more business data into a generic help desk, make the business system primary and bring conversations into it.

BEFORE / TOOL-CENTRIC

Context lived elsewhere

The help desk sat in the middle. Account, booking, expiry and history lived in other systems.

Reps rebuilt the relationship manually on every ticket.

AFTER / BUSINESS-CENTRIC

Context became the interface

A custom operations platform holds records, conversations and workflow in one workspace.

Email · SMS · Support → Customer · Certificate · Booking

THREE DECISIONS THAT MADE THE SYSTEM DURABLE

01

Business data first

The ticket is attached to the account, certificate and booking. It is not treated as an isolated thread.

02

Channels at the edge

Email and SMS map directly into the application, reducing dependence on the original help desk vendor.

03

Protect the live core

The platform reads booking data one way and never writes back, removing a path to corrupt production records.

WHY THIS MATTERED

The system could become operationally useful without turning customer support into a risky write-access layer over live booking data.

03

What Was Built

OVERVIEW

One operating view, from first lead to completed booking.

Conversations, customer records, lifecycle state and follow-up logic now live in the same operational surface. The platform is a JavaScript/React custom application built around the business's own process, not around a vendor's tool.

SYSTEM OVERVIEW

CHANNELS

Email
SMS
Support

OPERATIONS HUB

Custom CRM + service desk

Business-aware workflow. Understand the ticket without reading the entire thread.

CAPABILITIES

Rich filters
Linked records
Issue summary
AI draft
Human approval

THE OPERATING LIFECYCLE

State is what turns a conversation into work.

Casino

Event

Lead

Certificate

Booking

The platform can trigger the right reminder or follow-up from lifecycle state, while still keeping final outbound control with a person.

BY THE NUMBERS

TEMPLATES

14

State-based email templates tied to record changes.

CHANNELS

2

Direct communication channels: email and SMS.

WORKSPACE

1

Operational workspace for service and lead context.

04

Business-Aware AI

OVERVIEW

Confidence is not authority.

The platform can be highly confident in an answer and still have no permission to send it. Confidence and authority are separate systems.

MODEL CONFIDENCE

High

How sure is the system that the draft is correct?

OUTBOUND AUTHORITY

0%

What is the system allowed to do without a person?

FROM INCOMING TICKET TO APPROVED RESPONSE

01

Read

New ticket

02

Reason

Issue plus records

03

Draft

Real customer data

04

Review

Human decision

GROUNDING IN THE BUSINESS

The AI reads the issue, retrieves the relevant account, certificate and booking records, then drafts with that customer's actual data. If the answer is a booking link, the draft contains the real link.

The highest-confidence tier still produces a draft.

A human makes the final call before anything sends.

05

Safety in Production

OVERVIEW

Safety is checked twice, because the world changes during review.

The outbound decision is validated when the draft is created and again immediately before delivery.

TWO-GATE OUTBOUND CONTROL

1

Review-time check

Rules evaluated before a person sees the draft.

BETWEEN THE GATES

Human review

State can change while the message waits, so permission must be recomputed.

2

Send-time check

The full set is re-checked server-side at the instant of send.

EVERY OUTBOUND MESSAGE MUST CLEAR

Rule	The question it asks
Do-not-contact	Is the person globally suppressed?
Channel opt-out	Has this person opted out of email or SMS?
Contact window	Was the person already messaged in the last 7 days?
Outcome state	Did the thing being chased already happen?
Local time	Is delivery appropriate in the person's time zone?
Server validation	Do all rules still pass at the instant of send?

PROTECTED-CORE ARCHITECTURE

LIVE BOOKING SYSTEM

Read only

One-way read. No write-back.

OPERATIONS PLATFORM

Owned core

Signed realtime intake plus hourly reconcile.

OWNED EMAIL + SMS

Direct mapping

Channels attach to the application, not a vendor.

06

Production Proof

OVERVIEW

Operational outcomes without vanity metrics.

The strongest evidence is concrete. The system is in production, supports real partner operations and changes how context, control and ownership work.

20+

CASINO PARTNERS

supported by the platform in production

The lead proof point is scale in live operations, not an unverified percentage lift.

WHAT CHANGED FOR THE BUSINESS

01

Faster context

Reps can see linked records and understand the case without reconstructing the customer's history from scratch.

02

Retention-supporting replies

Relevant booking records and real links enter the response workflow, helping the team move opportunities forward.

03

Data ownership

Ticket and channel data now live inside the business's own operational platform.

04

Less vendor dependency

Direct email and SMS mapping reduces lock-in to the original help desk layer.

DOCUMENTED PRODUCTION FACTS

14 LIFECYCLE
TEMPLATES

EMAIL + SMS

REALTIME + HOURLY
BACKUP

HUMAN-CONTROLLED
OUTBOUND

07

The Broader Lesson

OVERVIEW

Maybe you do not need another integration.

You may need a new center of gravity.

Companies reach a point where their real operating process becomes more sophisticated than the SaaS tools they started with. The warning signs are usually visible before the replacement plan is.

A QUICK DIAGNOSTIC

- ✓ People copy data between systems.
- ✓ Support constantly searches for context.
- ✓ Important workflows live in spreadsheets.
- ✓ Automations are fragile or hard to explain.
- ✓ Teams work around the software.
- ✓ AI cannot see the actual business state.

SOFT NEXT STEP

Request a Systems Audit

Bring the tools, handoffs and recurring friction. Hill Tribe Solutions will help identify where custom software, AI or consolidation could remove operational drag.

hilltribesolutions.com/contact

Build around the business, not the workaround.

Hill Tribe Solutions designs custom applications, internal tools and AI-assisted workflows for founders and growing businesses.