



A GUIDE FOR BUSINESS LEADERS

What You Can Build on Your Data

The data to achieve greater profitability, efficiency, and growth is already yours. **The problem is where it lives.**

THE PROBLEM WE SOLVE

Your sales numbers are in one spreadsheet, your finances in QuickBooks, your customers in a CRM, your operations data across three more tools — and the story that connects them lives in the heads of two or three people.

Every sales pitch or quote becomes a scavenger hunt. Every board packet takes a week to assemble. *And the person who knows how it all fits together can never take a real vacation.*

BUILDING THE FOUNDATION FOR AI

One secure, organized layer

We connect your existing systems into one place your whole team can ask questions of in plain English. From scattered to connected — every engagement starts here.



Map & document your data

Sales, finance, operations, and customer data consolidated, cleaned, and connected — hosted securely. Your data stays yours, with no change to existing workflows.



Ask it questions in plain English

Any employee can ask “how many units did we ship last quarter, by region?” and get a reliable answer drawn from your real data.



One secure source of truth

Contracts, past proposals, meeting notes, and product or service details organized so they can actually be found — and referenced by AI when drafting new material.



A clear AI policy

An acceptable-use policy we help you write, so staff know what tools are approved and what data can be shared. This matters for customer trust as much as security.



Applications that deliver real value

Each one runs on your connected data, updated in real time — accurate context without retraining a model every time.

1 Sales

Pipeline visibility and outreach that runs on your real CRM data, not last month's export.

Pipeline analysis

Reporting

Outbound / inbound automation

2 Operations

Tighter inventory and scheduling instead of six spreadsheets that never quite agree.

Inventory management

Scenario & resource planning

Service delivery

Scheduling

3 Finance & Administration

The same dollars reported by client, by product, and by department — without a monthly rebuild.

Month-end close

Audit

Onboarding

Resume screening

Routine HR tasks

4 KPIs, Dashboards & Board Reporting

A live dashboard — revenue, pipeline, cash position, production, customer retention — instead of numbers that are weeks old by the time the board packet ships.

5 Institutional Memory

Decisions, processes, and know-how captured centrally — even from meeting transcripts — so turnover costs you an employee, not the company's memory.

6 Marketing & Communications

More content, consistent voice, and current data — with tone tuned per audience and messaging refined by the performance of past campaigns.

How an engagement works

4–6 weeks

\$20k flat rate

01

Write policy & document your data

02

Consolidate & clean

03

Connect your existing systems

04

Stand up plain-English queries

05

Build your first priority use cases

Built to grow with you. Further custom development and additional use cases can be built on top of this foundation as a follow-up — none of it requires hiring technical staff.