

01 · OVERVIEW

PROPOSAL

Move faster with the knowledge you already have

Find what you need, understand what matters, and act without reconstructing the story every time.

PREPARED FOR David Lindover Partner Marketing Works International	PREPARED BY Atlas Assistants AI Operator engagement	SCOPE Month 1 Knowledge retrieval implementation
INVESTMENT \$5,000/month EA + AI Ops System, billed monthly	MONTH 1 DELIVERS Business Memory Plus your executive priority system	COMMITMENT Month to month Every cycle ends with your decision

OUR RECOMMENDATION

Spend Month 1 building your knowledge retrieval system, so you can find PMW's history and act on it faster. Month 2 opens with a fresh audit to pick the next opportunity.

01.1

The opportunity for you

You have spent years building client relationships, content, case studies, proposals, and industry knowledge. None of it is missing. Reaching it is the problem.

- Retrieval depends on remembering the right person, file, phrase, date, or system.
- Work arrives from meetings, Slack, ClickUp, email, and notes. You can know something needs attention without remembering why.
- Joseline carries the missing context and reconstructs the story for you.
- You called yourself a choke point. Strategic knowledge still depends on you, and client delivery leaves no time to transfer it.

WHAT WE ARE AIMING AT

Make PMW's accumulated knowledge and your current priorities available the moment you need them.

You feel it first: less searching, less remembering, less asking. Then PMW feels it, as the same foundation supports research, client preparation, and new workflows.

WHERE PMW'S KNOWLEDGE LIVES TODAY

FROM YOUR AUDIT

OneDrive	75% of content in Word
ClickUp	Under 5% of it used
Pipedrive	~23,000 records
Slack	
Microsoft Teams	
Outlook	
Fathom	Meeting record

You and Joseline

THE INDEX

Client preparation

Proposals and pitches

Content and research

Daily priorities

01.2

Why searching OneDrive alone will not solve this

OneDrive search is a real tool, but it was built to locate files, not answer questions. That gap is why so much of PMW's case studies, proposals, and sales enablement material, 75% of it sitting in Word docs, stays out of reach.

- **It surfaces documents, not answers.** A search returns a list of files. Someone still has to open each one, scan for the right section, and pull out the specific detail, slow going when the answer is one paragraph inside a much longer case study or proposal.
- **It leans on file names, not file content.** Search quality tracks how well something was named and tagged. A case study saved under a client name or a date, rather than the industry or use case it actually proves, is effectively invisible to anyone searching by topic.
- **It breaks on word choice.** A search for "renewal pricing" will not surface a proposal that only says "contract extension terms," even when that proposal holds the exact answer. Wording drifts across 25 years of client work faster than anyone goes back and standardizes it.
- **It cannot combine documents.** A question like "what's worked for enterprise renewals" may live across three separate case studies. Native search returns three documents; reading and combining them into one answer is still manual work, every time.

QUERY	KEYWORD SEARCH FINDS	SEMANTIC SEARCH FINDS
"pricing objection case study"	Only documents containing both "pricing" and "objection"	Case studies where a prospect pushed back on cost and PMW still closed
"podcast guest talking points"	Documents titled "Podcast Guest Talking Points"	Guest bios, prep notes, and briefing docs from every show, however named
"enterprise renewal messaging"	Documents containing both "enterprise" and "renewal"	Retention and expansion pitches for larger accounts, even if filed by client

WHAT THIS MEANS FOR PMW

This is the gap AtlasOS's retrieval layer closes: it matches meaning instead of exact wording, pulls the relevant section instead of the whole file, and can draw one answer from several documents at once.

01.3

What changes after the first month

Four differences you feel personally, before the business feels them.

Find what you mean, not what you remember

Describe a client, situation, industry, or type of work and retrieve it without knowing the filename or the original wording.

Reuse PMW's history to work faster

Past case studies, proposals, and research become starting points for meeting prep, new content, and business development.

Understand why something needs you

Every priority arrives with its reason, source, client, and the decision required, instead of a disconnected task.

Rely less on Joseline for recall

Answer routine context questions yourself. Joseline stays on prioritization, judgment, and quality control, rather than serving as the only bridge to PMW's history.

THE PATH TO AN ANSWER

STRUCTURAL, NOT MEASURED

TODAY 5 STEPS

1. Remember roughly what it was called
2. Pick a system to search
3. Search, miss, search again
4. Ask Joseline
5. Reconstruct the story

AFTER THE FIRST IMPLEMENTATION 2 STEPS

1. Describe what you need
2. Receive the material with its context

TODAY	AFTER THE FIRST IMPLEMENTATION
You search several systems or ask Joseline	You ask once and get the best available context
A task can be separated from the conversation that created it	The task carries its source, reason, and owner
Past work is hard to find unless you recall how it was labeled	Related work surfaces through meaning and context
Your expertise is hard to reuse across the business	Your historical material becomes an input into current work

02 · WHAT WE BUILD

02.1

What we will build first

Month 1 is one complete knowledge retrieval implementation with two connected outcomes: PMW Business Memory, and that memory applied to your priorities and daily briefing.

OUTCOME ONE

PMW Business Memory

A retrieval system across selected PMW sources. Ask natural questions about clients, contacts, past work, decisions, and commitments.

It uses retrieval augmented generation, or RAG, to find information by meaning rather than exact keywords. A search for "case study" misses anything filed as a client win, customer story, or sales proof point. Contextual retrieval finds them anyway.

YOU WILL BE ABLE TO

- Recover the history of a client or relationship
- Find contacts by company, role, project, or industry
- Retrieve past case studies, proposals, briefs, and research
- Find similar work before starting a new assignment
- Prepare for meetings with history and open commitments
- See what was decided and what still needs action
- Run research questions against PMW's own past work

QUESTIONS IT IS BUILT TO ANSWER

What was our last real conversation with this client?
What work have we done for similar companies?
Which case studies would strengthen this proposal?

Who was involved in that cybersecurity story?
What do I need to know before this meeting?
What commitments are still open with this account?

OUTCOME TWO

Your executive priority system

We connect your task workflow to the context behind the work.

ClickUp stays the operating record. The system captures candidate tasks from the sources in scope, organizes the context, and prepares a Start of Day view. Joseline remains the quality control layer.

YOUR DAILY VIEW CAN SHOW

- Your highest priority actions
- Why each item matters
- Who is waiting on you
- The client, project, or outcome behind the work
- The meeting or message that created it
- What is blocked or overdue
- What only you can decide
- The context you need to act

You should not have to become a ClickUp power user to understand your day.

02.2

How you will experience it

Two surfaces. You ask questions where you already talk, and you get one briefing built for how you decide.

Ask questions in Slack

Message the agent naturally. You should not need to know which system holds the answer before you ask.

David: What do I need to know before tomorrow's call with the healthcare-sector client on their renewal?

Atlas:

Meeting preparation

- Mid-market healthcare, a client for 5 years.
- 40 published case studies written for them ([OneDrive folder](#))
- Concerns raised last month that case studies were not aligned to their new vision.
- The renewal has sat in Proposal Sent for 9 days, most likely because of the pricing objection from last week's call that is still unanswered. ([Call Notes](#))

Let me know if you want the full history and current status on this account.

Receive a concise daily briefing

Your Start of Day view is built for fast reading: priorities, context, blockers, and decisions. No dashboard to navigate.

1. **The healthcare client's renewal is stuck on an unanswered pricing objection**
Raised on last week's call. Pipedrive shows the deal has sat in Proposal Sent for 9 days. ([Pipedrive deal](#))
2. **A decision on the healthcare renewal discount is blocking two people**
Joseline needs your call on the 12% counter before she can respond to the client. Both have been waiting since Tuesday.
3. **A case study needs your sign-off before it goes out**
The mid-market healthcare case study, final review stage in ClickUp since Thursday. ([Case Study Draft](#))
4. **Review and respond to Russ's proposal on building a knowledge retrieval system**
Atlas is waiting on your direction before the activation session can be scheduled. ([Proposal](#))

Both screens are illustrative. They show the intended shape of the experience, not output from your live data.

ClickUp stays the operating record

It holds the structured task and workflow information
Joseline manages and validates.

The infrastructure stays in the background

Atlas may use Obsidian or another layer to organize
retrieval. It should fit your working style, not add a
filing routine.

03 · HOW WE DELIVER

03.1

How we will deliver the first month

Four weeks from mapping to a stabilized, documented system you and Joseline have used on real work.

WEEK 1

Map the tools and define the proof

- Review the relevant OneDrive structure
- Confirm the ClickUp workflow with Joseline
- Select the first client, content, and task use cases
- Define the five to ten retrieval questions
- Confirm the Slack experience and integrations
- Define your Start of Day format
- Measure current time and effort on those workflows

YOU RECEIVE

Weekly build update

WEEK 2

WEEK 2

Build the first working version

- Configure the selected knowledge sources
- Build contextual retrieval across the pilot material
- Configure the ClickUp task and context structure
- Create the first Start of Day briefing
- Test the approved questions on real PMW information

YOU RECEIVE

Weekly build update

WEEK 3

Use it in real work

- Test the system during live daily work
- Review missed or unhelpful results
- Improve retrieval and task rules
- Refine the Slack and briefing experience
- Confirm when Joseline reviews or overrides the system

YOU RECEIVE

A workflow refined by actual use, not a demo built
around ideal examples

WEEK 4

Stabilize and complete Month 1

- Complete QA against the approved questions
- Train you and Joseline on the working process
- Document the operating workflow
- Review adoption, value, and limitations
- Confirm what the build revealed about the next opportunity

YOU RECEIVE

The completed system, a results review, and the
evidence to begin a fresh audit in Month 2

03.2

How this works with Joseline

This strengthens your partnership with Joseline rather than replacing it. She has already improved PMW's email, SOPs, podcast workflows, ClickUp, and lead follow up. That worked because she understands your business and applies judgment.

THE SYSTEM

- Retrieves context and identifies candidate tasks
- Finds relevant historical material

JOSELINE

- Validates priority, owner, timing, and accuracy
- Confirms authoritative information

YOU

- Set direction and make executive decisions
- Apply the material to clients and content

ATLAS

- Maps, builds, tests, and improves the workflow
- Expands coverage only when the first layer works

AI handles retrieval, preparation, and repetitive organization. You and Joseline keep judgment, prioritization, relationships, and quality control.

04 · PROVING VALUE

04.1

How we will measure value

We measure the return rather than manufacture it. Week 1 establishes the baseline. Week 4 compares against it.

Your value scorecard TARGETS, NOT RESULTS

Speed and capacity	ASSUMED TODAY → ATLAS TARGET
Time to find client history or previous work	~2 hrs → under 5 min
Time to prepare for a representative client meeting	~2 hrs → under 5 min
Time Joseline spends reconstructing your context	~1.5 hrs → under 5 min
Time to identify a relevant case study or source document	~1.5 hrs → under 5 min

If those four hold at roughly once a week each, that is about **6 to 7 hours a week** returned across you and Joseline. Week 1 tells us whether the starting figures are right.

Execution quality	ATLAS TARGET · SCORED WEEK 4
Approved questions answered usefully	8 of 10
Candidate tasks accepted without edit	7 of 10

Priority items carrying source, reason, and owner

10 of 10

Commitments surfaced before they become late

9 of 10

Enterprise retrieval systems score around 95% on simple lookups but fall to roughly 60% once a question spans conflicting sources. Eight of ten sits deliberately between those.

Adoption

ATLAS TARGET · SCORED WEEK 4

Days a week you use the agent or briefing

4 of 5

Briefings Joseline can approve without rebuilding

9 of 10

Places you look to answer a context question

1, not 3+

Surfaces still in use with no prompting from Atlas

Both

Business value signals

ATLAS TARGET · SCORED WEEK 4

Documented cases where past work improved a live conversation

3 or more

Joseline capacity redirected to strategic coordination

1 to 2 hrs a week

Prior PMW assets pulled into new work

5 or more

Candidate workflows identified for Month 2

2 or more

Read every number as a target, not a finding. The "assumed today" times are Atlas's working estimates from the audit conversation, not measurements of PMW. The Week 4 targets are set against published enterprise benchmarks for retrieval accuracy and AI tool adoption, then pulled toward the conservative end. Week 1 replaces the assumptions with your real baseline and we agree final targets from there. We will not report a saving we have not measured.

04.2

The first month is the foundation

We do not think it is responsible to pretend we already know months two and three. The highest value opportunity may only become clear once you and Joseline use the first build.

END OF MONTH 1

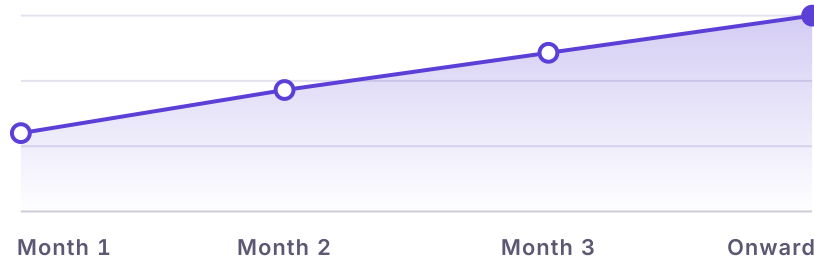
We revisit the business with you

Five questions decide what happens next.

- What worked, and what did you actually use?
 - What created the most value?
 - What still slows you down?
 - What new opportunity did the build reveal?
 - What should we build next, and what should we defer?
-

Then we run another focused audit, prioritize again, and propose the next workflow.

How the system compounds ILLUSTRATIVE



MONTH 1 Business Memory and executive priorities

MONTH 2 Audit the bottleneck, then build the top workflow

MONTH 3 Add the next workflow to the same foundation

ONWARD Each build starts from what already exists

The rising line shows that each month starts from more than the last. It is not a measured rate of return. What gets built is decided by the audit at the end of each cycle.

FUTURE WORK IS NOT AUTOMATIC

Each month ends with a decision. You can continue, redirect the roadmap, or pause based on the value and adoption of the previous cycle.

04.3

Potential future areas

Identified during the audit. These are opportunity areas, not commitments. The next audit decides what matters most.

TOP CANDIDATE

Content workflow acceleration

Move content from intake through research, writing, review, approval, and production with less coordination drag, while keeping human editorial judgment.

Pipedrive data readiness

Clean and organize roughly 23,000 records so PMW has a dependable foundation for contact retrieval, prospecting, and follow up.

Lead outreach support

Identify, prepare, and follow up with high quality prospects once the underlying CRM data is ready.

Content talent pipeline

A repeatable process for finding and evaluating the specialized writers PMW needs.

05 · INVESTMENT

05.1

Investment and next step

One engagement, one monthly figure, and one 60 minute session to start.

EA + AI OPS SYSTEM

\$5,000/month all in

Joseline's work and the AI Ops system are one engagement. She operates inside the system, the system carries the context she would otherwise reconstruct, and together they replace work that currently runs through you.

WHY THIS RATE

Atlas's standard rate for this engagement is \$6,000 a month. We are holding PMW at \$5,000 because Joseline already knows your operation, which removes most of the discovery a new engagement would need.

INCLUDED

- Joseline's ongoing executive support
- Consulting and process mapping
- Implementation and testing
- Training and adoption support
- Weekly build updates

RECOMMENDED NEXT STEP

Approve the direction and schedule a 60 minute activation session

With Joseline, the Atlas Account Manager, and the Atlas AI Operator.

IN THAT SESSION WE CONFIRM

- | | |
|---|---|
| 01 The first OneDrive folders and information sources | 04 The Slack agent experience |
| 02 The ClickUp workspace and task structure | 05 The Start of Day briefing format |
| 03 The five to ten questions Business Memory must answer | 06 Joseline's review and correction process |
| | 07 The baseline measures for the first month |

After the session, Atlas issues the confirmed first build plan and begins implementation.

05.2

What Atlas brings

You are not only paying Atlas to connect tools. You are paying us to determine what is worth building.

WE HELP YOU DECIDE

- Which problem is worth solving first
- Which workflow should change before it is automated
- Which information should become authoritative
- Where your judgment and Joseline's must remain
- What should be built, deferred, simplified, or removed
- Whether a system reduces work or creates noise
- What the next high value build should be

Consulting, process mapping, implementation, testing, and adoption are all part of the engagement.

WHAT YOU RECEIVE AFTER MONTH 1

- A working PMW Business Memory across the approved sources
- A Slack based question and retrieval experience, subject to feasibility
- A structured ClickUp priority and context workflow

- A Start of Day briefing built around how you decide
- A documented operating process for you and Joseline
- A value and adoption scorecard
- A record of limitations and deferred opportunities
- A prioritized recommendation for the next audit and build



Proposal for Partner Marketing Works International · July 2026

Prepared following the AtlasOS audit of 23 July 2026