

AI INSTALLATION PITCH · MAY 2026

Reducing Repetitive Operational Load *at PFC*

A practical AI-assisted support system for internal operations and communication

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THE CURRENT REALITY

As organizations grow, operational friction *increases*.

At PFC, some of that likely includes:

- The same questions answered repeatedly
- Staff spending time locating documents and procedures
- Information spread across emails, PDFs, folders, and staff memory
- Different staff sometimes giving different answers
- New hires taking time to learn where information lives
- Senior staff becoming the "go-to search engine"
- Repetitive administrative communication consuming skilled staff time
- Valuable operational knowledge living inside individuals, not systems

The issue is not lack of knowledge.

The issue is access to consistent knowledge.

Most operational answers already exist somewhere inside PFC:

- Standard Operating Procedures (SOPs)
- website content
- onboarding materials
- member documents
- emails
- policies
- operational experience from staff

The challenge is that information is spread across:

- folders
- PDFs
- email chains
- different systems
- individual staff knowledge

As a result:

- staff spend time searching, answers are sometimes inconsistent
- experienced team members get interrupted repeatedly
- onboarding takes longer than necessary

The challenge is retrieving and using that information efficiently.

The goal is to centralize operational knowledge into a system that is easier to access, search, and use consistently. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis

AI tools can now organize and retrieve operational knowledge in a *practical and useful* way.



Locate information faster



Communicate more consistently



Reduce repetitive work



Onboard more efficiently



Focus on higher-value tasks

The goal is **operational support infrastructure** — not to replace staff.

This is not about replacing people.

The objective is operational support infrastructure that works alongside the existing team.

It is about helping staff:

- find information faster
- communicate more consistently
- reduce repetitive administrative work
- onboard more efficiently
- spend more time on higher-value tasks

Examples:

- locating the correct procedure quickly
- generating draft responses for common inquiries
- retrieving accurate policy information
- helping new staff find answers independently

A focused internal support system — four components.

OBJECTIVE

Reduce repetitive operational friction using systems and information PFC already has.

1 Internal knowledge workspace

- A private AI-assisted workspace built using PFC's SOPs, policies, onboarding materials, FAQs, and operational procedures.
- Staff can quickly retrieve information, locate documents, and reduce reliance on verbal knowledge transfer.

2 Communication assistance

- AI-assisted drafting for repetitive communication such as inquiries, follow-ups, policy explanations, and common student questions.
- Staff remain fully in control of reviewing and approving all communication.

3 One targeted workflow automation

- One repetitive operational process selected for automation during the initial phase.
- **Example:** Inquiry submission > draft response > internal notification > follow-up sequence

4 Training and handoff

- Simple staff onboarding, recorded walkthroughs, written procedures, and a post-launch refinement period to ensure long-term usability.
- **Objective:** Reduce repetitive operational friction using systems and information PFC already has.

COMPONENT 1

Internal knowledge workspace

A private AI workspace configured specifically for PFC. Built using:

SOPs

Policies

FAQs

Onboarding docs

Website content

Internal procedures

Only designated admins manage and update the system. Microsoft 365 permissions can also be respected.

STAFF CAPABILITIES

- Ask operational questions and get consistent answers
- Locate information quickly without interrupting senior staff
- Retrieve current procedures at any time
- Reduce back-and-forth for common queries

COMPONENT 2

Communication assistance

AI-assisted drafting for repetitive communication:

- Inquiry replies and follow-ups
- Common student questions
- Policy explanations
- Complaint responses

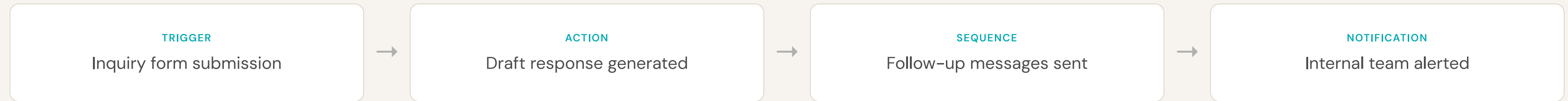
KEY POINT

The AI assists. Humans remain in control.

WORKFLOW

- **Email arrives**
- **Staff paste or forward** it into the assistant
- **AI generates a draft** using PFC information
- **Staff review** and approve
- **Staff send**

Operational Assistance *Tools*



WHY ONLY ONE?

Keep the implementation practical, measurable, and low-risk.

In addition to knowledge retrieval and communication assistance, the system can help reduce repetitive operational work across the organization.

START POINT

The highest-value workflow is identified during discovery.

Examples could include:

- locating documents and procedures quickly
- retrieving policy information
- helping staff answer operational questions consistently
- assisting with onboarding and training support
- organizing commonly used operational information
- generating draft responses for repetitive communication

EXPANDABLE

Additional workflows can be added after the initial build is validated.

The purpose is not to automate the entire operation.




The purpose is to reduce day-to-day operational friction and help staff work more efficiently using information PFC already has.

WHY THIS FITS PFC SPECIFICALLY

PFC is well suited for this type of system.

- The organization already has strong operational knowledge
- Many questions and workflows are predictable and repeatable
- Existing systems and documentation already exist
- The team is large enough to benefit immediately
- I already understand the operation and communication style

THAT REDUCES

-  **Implementation risk**
Less guesswork — I know the operation
-  **Ramp-up time**
No lengthy discovery of the basics
-  **Operational disruption**
Built around your existing systems

IMPORTANT TO CLARIFY

This is *not*:

✗ Replacing staff

✗ Public AI exposure

✗ A massive software migration

✗ Experimental technology

✗ Complicated prompt engineering

✗ An attempt to automate everything

THE OBJECTIVE IS SIMPLE

Reduce repetitive operational load.

FIRST STEP

A focused discovery process.

Purpose:

- Identify repetitive workflows and communication bottlenecks
- Review operational friction points
- Assess existing documentation
- Define the highest-value opportunities

DELIVERABLE

A written implementation scope with recommendations and pricing.

NO COMMITMENT REQUIRED

The discovery session produces a written scope. PFC then decides whether to proceed — with full visibility into what's involved and what it costs.

IMPLEMENTATION TIMELINE

Eight weeks from discovery to *go-live*.

WEEKS 1-2

Discovery & Scoping

Operational review, bottleneck mapping, scope definition

WEEKS 3-5

Configuration & Build

System setup, knowledge base build, automation configuration

WEEK 6

Training & Go-Live

Staff training, handoff documentation, system launch

WEEKS 7-8

Monitoring & Refinement

Performance review, adjustments, and final sign-off

WHAT I'D NEED FROM PFC

Four things to get started.

✓ Approval to proceed with a discovery phase

✓ Limited leadership time for operational review

✓ Access to relevant documents and systems

✓ Feedback during testing and refinement

OPTIONAL – LATER

Because PFC would be a launch client, I may later ask for a testimonial and permission to reference the project as a case study.

Entirely optional. No obligation.

PRICING POSITIONING

PFC would be my *launch client.*

Because PFC would help refine and validate this offering in a real operational environment, the investment would be substantially lower than future implementations.

Pricing is discussed only after discovery and scope definition — when we both know exactly what is involved.

LAUNCH CLIENT PRICING

Substantially below market

Exact pricing after discovery

No investment is requested today. The discovery session comes first. Pricing is fixed and agreed before any build begins.

IF THIS DIRECTION MAKES SENSE

One clear next step.

- 1 **Book a 90-minute discovery session** — next week
- 2 **Within 5 business days: written scope, recommendations, fixed pricing, and projected timeline**
- 3 **PFC decides** whether to proceed

✓ No obligation.

PRESENTED BY

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