Capability statement

We audit how your business runs, then build what lets it scale

Version 1.0 | Audit, Roadmap, Build, Run | Sydney, Australia

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01 What we are for

Most businesses pay twice: once for their tools, and again for the hours their people spend working around them.

We started by auditing spend. The biggest costs we found were not subscriptions but manual processes: hours spent doing what software should do. Replacing the process gives the week back, and room to take on more work without adding cost. So we build the replacements, and every engagement follows the same line.

FIND IT

Audit

Where the money and the hours go, with the evidence beside every number.

PRICE IT

Roadmap

A costed plan, every stage priced on its own, so you choose what to build.

SHIP IT

Build

Software, automation and AI, delivered in stages you sign off one at a time.

KEEP IT WORKING

Run

Hypercare, warranty, ongoing management, or a white glove partnership.

You can stop after any step. What you have paid for is yours to keep.

02 Three results

Every engagement aims at one or more of these. We name which before we start, and how we will both know it worked.

Revenue

Sell more from what you already have.

- ✓ Every enquiry answered and followed up
- ✓ Quotes and engagement documents out the same day, signed online
- ✓ Clients serving themselves in a portal under your brand
- ✓ Past clients and lapsed leads put back to work

Capacity

More output from the same team.

- ✓ Meetings that write their own notes and actions
- ✓ Data entered once and carried everywhere
- ✓ First drafts ready for a person to check and send
- ✓ Reporting and reconciliation that assemble themselves

Cost

Out of the process, not only the invoice.

- ✓ Unused licences removed and duplicate tools consolidated
- ✓ Stacked subscriptions replaced by one system you own
- ✓ Cloud and AI usage watched daily
- ✓ Re-keying errors designed out at the source

We do not pitch headcount cuts. The aim is to take repetitive work off qualified people, so the team you trust carries more and the business grows without its costs growing at the same rate.

Built by a lawyer

Permissions, approvals and audit trails are in the first version, not added after an incident.

Senior hands only

The people you meet are the people who build it. No hand-off once you have signed.

Your stack first

If a tool you already pay for solves it, we name it. We build only where building is better.

Terms in the open

Our service levels and confidentiality undertaking are published for anyone to read.

Audit

Find where the money and the hours go

An audit is a piece of work in its own right. You keep it whether or not you build anything with us.

What we read

- Bank and accounting feeds
- Licences, subscriptions and contracts
- Your real files and reports
- How work moves and where it waits

What we do with it

- Trace every figure to its source
- Separate what works from what is quietly broken
- Put a number on each finding

What you get

- Findings, each with its evidence
- Savings and hours, quantified
- What to cancel, consolidate or automate
- A costed plan for what is worth building

- Spend and stack. Every tool, licence and contract, read from your ledger and bank feeds.
- Process and capacity. The hours each process costs, and which of them software should do.
- Data. Whether your records can carry the system you want.
- Integration checks. Proof a connection works, and what it costs to run, before anyone quotes on it.
- Security hygiene. What an outsider can see of your systems. Nothing is touched.
- Platform review and AI readiness. What is sound in a system you inherited, and which AI uses are worth keeping.

Roadmap

Price it before you commit to it

A Roadmap turns "we think we need software" into a costed, staged plan you could hand to anyone. It is written after we have examined your real data, and it is the only document a build is quoted from: what it is for, what is in and out of scope, every stage priced on its own, what it costs to run, and who owns what.

In your portal the Roadmap is interactive. Tick the stages you want and the total moves with you. What you tick is what you sign.

Pricing. Audits and Roadmaps are a fixed fee agreed before we start. The Roadmap fee is credited in full against the build.

Build

Software designed around how you work

Each build is designed around one business's workflow and carries that business's brand from end to end.

Custom business software

Internal tools, workflow apps and CRMs for the process nobody sells off the shelf.

Client portals in your brand

Live status, documents, forms, uploads and payments behind one private link.

Workflow automation

Data entry, reconciliation, documents, reminders and follow-ups, done by machine.

AI assistants and agents

Drafting, extraction, matching and summaries from your records, with a person approving.

Systems integration

Accounting, CRM, store and inbox behaving like one system instead of six.

Meeting intelligence

A private assist panel during the call, then briefs, actions and record updates.

Documents and e-signature

Letters, proposals and compliance packs generated, approved, signed and filed.

Dashboards and reporting

One source of truth for pipeline, cash flow, approvals and performance.

Matching and scoring

Candidates to roles, leads to offers, ranked before a person looks.

Accounting and obligations

Bills read into entries, approval chains, and every lodgement date on one calendar.

Compliance and deadlines

Dates pulled from documents and queued as reminders a person approves.

Digital hiring

Short applications with on-camera answers, scored and sorted before anyone opens one.

Quizzes and scored assessments

A scored assessment ending in a personalised report and a booking link.

Community and membership

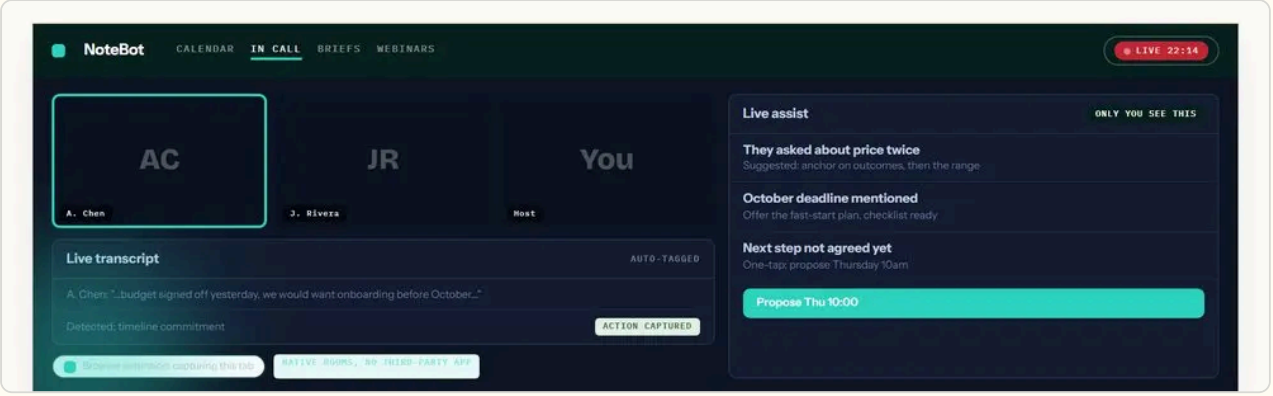
Spaces, events, courses and templates behind one sign-in.

Websites and web apps

New sites and rebuilds, with search visibility and the enquiry path behind them.

Platform rescue

An inherited or half-built system reviewed, stabilised and made supportable.



Try the demos

Our Build gallery has twelve working demos you can click through: a live meeting assistant, a client portal, accounting, a CRM, hiring, automation and more. Brands and data are stand-ins. It is published at atozformula.com/gallery.

How a build is delivered. In stages, each priced before it starts. Working software every week, a sign-off gate at the end of each stage, an automated test suite behind every change, and training at handover.

Run

Keep it working after launch

Every build includes 30 days of hypercare and a 90 day warranty on each phase. After that you choose how much of the running you want us to do.

YOU RUN IT

Self-managed

Documentation, release notices, and the right to book us.

WE MONITOR

Watched

Daily health checks and named monitors. When something trips, we both hear.

WE MONITOR AND ACT

Supported

Alerts actioned, security patches, small fixes and restore tests.

WE OPERATE IT

Managed

Monitoring, patching, releases and backups, with our fastest response time.

Change level or stop on 30 days notice. Prepaid support hours are also available. The detail is in our published Support and service levels notice.

Above Managed

White glove

A continuous consulting and development partnership. For businesses that want us closer than support reaches: the people who built your platform, working on it and on your business every month.

- ✓ Development time set aside for you. A share of our calendar each month, for continued building on your platform and the next things on your Roadmap.
- ✓ Ongoing consulting. A regular working session, plus technical and product guidance whenever a decision matters.

- ✓ Your technology lead, without the hire. Architecture, vendors, AI adoption and priorities, owned by people who know your systems.
- ✓ Everything in Managed underneath. Monitoring, patching, releases and backups keep running, with our fastest response time.

Quoted case by case, on what you are looking for.

- ✓ Technical lead by the day. Architecture, Roadmap ownership and vendor oversight. For the full partnership, see white glove.
- ✓ Vendor and technology selection. What to buy, what to build, what to stop paying for.
- ✓ AI adoption. Where AI earns its place, the guardrails it needs, and the order to bring it in.
- ✓ Technical due diligence. A platform or security review before you buy, invest or inherit.

AI, used properly

Half of what gets sold as AI is really workflow. We tell you which is which.

Exact where it counts

No client-facing figure our software produces is generated by a model.

A person approves

AI output is flagged and checked before it reaches a client, a candidate or a ledger.

Your information trains no model

We use only providers whose terms do not permit it, and list them on request.

03 How an engagement runs

Scoping call

20 minutes, no charge.

Audit or discovery

Your real data, systems and process.

Roadmap

You tick the stages you want.

Stage 1

Working software in your hands.

Sign-off

Nothing proceeds until you are happy.

Later stages

The same rhythm, one at a time.

Go-live

Handed over, everyone trained.

04 Selected work

We describe clients by industry and never by name. It is the same protection you would get.

Candidate matching and outreach drafting

Reads the job boards each morning, grades every candidate against every open role, and drafts a first approach for the consultant to edit. Runs on a book of more than 35,000 candidates.

A firm operating system

Intake, matters and work in progress captured as the work happens, so time flows into billing without being rebuilt at month end.

Order intake to shipping

Orders that were typed into three systems by hand now move from ticket to inventory to carrier in tools the business already pays for.

Cost and platform audit

12 months of the ledger read line by line, every saving quantified and traced to its source.

Policy automation and a daily operations brief

Compliance knowledge drafted and filed against the actual obligations, with a morning brief of what needs a decision.

Capability website and client systems

A services hub and project library moved off a page builder, with enquiries, quoting, applications and the portals behind them.

Our own platforms run the same way: the client portal every engagement lives in, an audit platform, and NoteBot, the meeting intelligence product we run our own business on.

Tested, properly

Every platform ships with an automated test suite that runs before a change reaches you.

Automated tests in each suite, at the latest count.

05 What is in writing

Confidentiality from the first conversation

Our published undertaking binds us from the moment you share information. One-way, in your favour, nothing to sign.

No lock-in

Monthly arrangements end on 30 days notice with no exit fee. Your accounts and data stay yours, and keys come back within 2 business days.

Providers at cost, prices that hold

Third-party charges are never marked up. Our prices are locked for 12 months, with 60 days written notice of any change.

Insured, under Australian law

Professional indemnity, cyber and public liability cover. Your Australian Consumer Law rights are preserved.

06 Who you work with

No account manager and no pitch team. When you email, one of us answers.



Emily Ward

Founder. Systems architect and the one who writes the code

Admitted lawyer, Supreme Court of New South Wales, trained at Macquarie University, then full time into AI engineering. Emily writes the code: agents, integrations, voice systems and the TypeScript, Python and SQL underneath, with a lawyer's instinct for risk and a developer's ability to ship. She led enterprise rollouts of Claude as an implementation partner for the AI Institute.



Brendan Elias

Founder. Scoping, commercials and the client relationship

Second-generation importer, 25 years in e-commerce, a seven-figure eBay and Amazon business built from Bondi, then a Bachelor of Commerce and a Bachelor of Laws; admitted lawyer (non-practising). Founder of High Ticket Partners, which runs client acquisition for founders and coaches with live events, voice and chat agents and automation. Brendan handles scoping, commercials and client communication.

07 Where to start

> **The first conversation costs nothing, and we will tell you if you do not need us.**

A 20-minute call

Audit, build, or neither. If off-the-shelf software solves it, we name the product.

An audit or a Roadmap

A costed plan in front of you before you commit to anything.

One stage

The most valuable piece first. Then proceed, pause, or take it in-house.

Book the Audit, or a 20-minute call first, at atozformula.com/book.

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