

Implement

AIOS Platform AIOS Pilot Programme

Overview

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AI Agent Platform: OS

Deploy Your Digital Workforce With Our AI Operating System

Onboard your own team of AI Agents that work around the clock to streamline your business operations. Our platform provides digital workers that handle everything from **outbound membership calls or updates, to inbound support and real-time data analysis.**

With our AI agents integrated into your workflows, you can **expand and augment your team, increasing efficiency, reducing costs, and effortlessly scaling your business** as it grows.

Expand Workforce

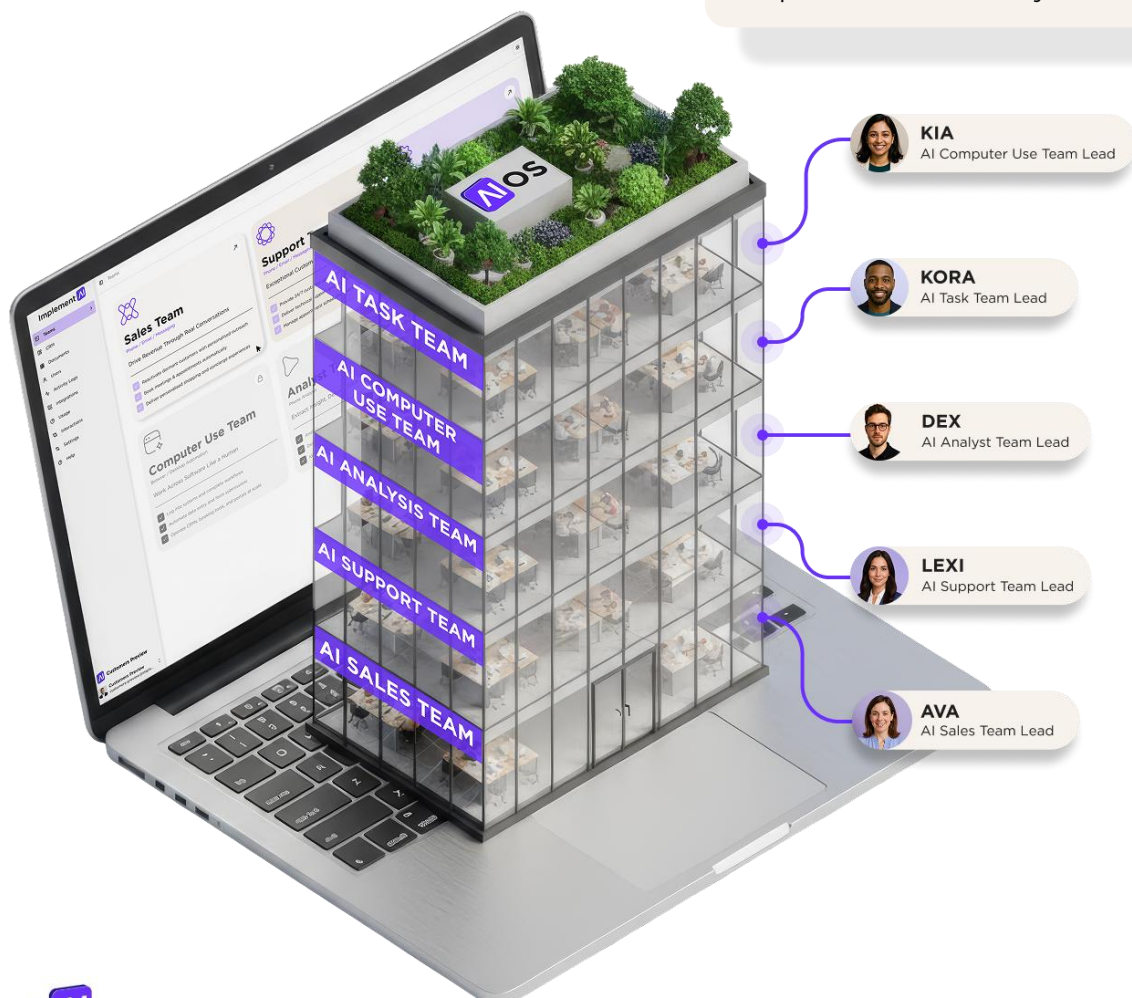
With AI agents handling more tasks, your business can accomplish more without necessarily increasing staff.

Augment Workforce

With real-time insights and guidance, your team can perform better and make more informed decisions.

New Capabilities

Deploy digital workers that can work way beyond human capacity in terms of speed and data analysis.



	Activate	Scale	Orchestrate
AIOS Setup			
Standard AI Agent (see example list) Set Up - Implementation 1-6 wks	3	5	10
Advanced Tasks (see example list) Upgraded once LIVE (6 wks - 3+ mths)	5	8	16
Advanced AI Agent (Including Computer Use)	0	3	5
Setup Fee	£5,000	£10,000	£15,000+ (PoA)
AIOS Subscription			
Monthly Subscription (excl. VAT)	£1,000	£2,500	£5,000
Additional Agent Setup	Not included	Two Concurrent Setup Projects	Two Concurrent Setup Projects
Additional Standard Agents Per Year	Customer Setup	10	20
Additional Advanced Tasks Per Year	Customer Setup	10	20
Total Standard Agents After Year 1	Up to 3	Up to 15	Up to 30
Credits Included	30,000	100,000	200,000
Additional Credits	£250 for 25,000	£250 for 25,000	£250 for 25,000
Additional Standard Agents (Price Per standard agent)	£2,500	Included	Included

Credit Consumption Examples

How Credits Translate Into Work Delivered

Credits represent the **AI action output** your digital workforce performs. Instead of paying for idle time or missed calls, you **only spend credits when work is done** – calls answered, CRM records updated, calls analysed, leads followed up etc.

Here are some illustrative examples of what credits* deliver:

- **Phone Calls:** 30 credits per minute
- **Emails:** 2 credits per email
- **Knowledge Base Analysis:** 5 credits per analysis
- **Call Analysis:** 50 credits per hour

*Actions are charged to the nearest individual credit. e.g. in this example a 30 second call would be 15 credits.

3. Standard & Advanced Agents

✓ Standard Agent

Single system, one primary task

Core Features

- > Single system connection
- > Executes one primary task
- > Logs activity to Portal
- > Manual trigger or simple automation

Example:

Inbound Voice Agent answers calls → uses knowledge base → logs to Portal

+ Advanced Tasks

- ⚡ 1 action = Update CRM
- ⚡ 1 action = Create task
- ⚡ 2 actions = Update CRM + Create task

✦ Advanced Agent

Multiple systems, intelligent workflows

Core Features

- > 2-5 system connections
- > Executes 2+ primary tasks
- > Scheduled monitoring & alerts
- > Multi-system analysis
- > Smart scoring & prioritisation

Example:

Monitors usage data + purchase history → identifies customers ready for upgrade → scores opportunities → creates targeted upsell list

+ Advanced Tasks

- ⚡ 1 action = Creates opportunities
- ⚡ 1 action = Assigns to team
- ⚡ 2 actions = Creates + Assigns

Quick Comparison

Feature	Standard Agent	Advanced Agent
System Integrations	1 system	2-5 systems
Automation Level	Triggered by events	Scheduled monitoring
Primary Tasks	1 task	2+ tasks
Data Analysis	Single source	Cross-system patterns
Scoring/Prediction	—	✓ Smart scoring
Setup Complexity	Moderate	Complex

4. Computer Use Agent

(Browser use and automation without APIs)

What are Computer Use Agents?

Computer Use Agents interact with systems that don't have APIs by using browser automation. They can navigate websites, fill forms, click buttons, and extract data just like a human would.

Key Capabilities:

- Login automation (handles authentication)
- UI interaction (click, form fill, navigation)
- Report downloads from legacy systems
- Data extraction from web portals
- Fill forms in third-party portals

Common Use Cases

Legacy System Integration

Access older systems without APIs to download reports, update records, or extract data automatically

Third-Party Portal Automation

Automate tasks on external platforms where you need to fill forms, upload documents, or retrieve information

Government & Regulatory Sites

Extract data from government websites (like Companies House) or submit compliance forms on regulatory portals

✦ Built on-demand based on specific customer requirements

5. Advanced Tasks – Examples

(Advanced Tasks are add-on tasks to any agent (Standard or Advanced))

Standard (No Tasks)

Agent performs task → Logs to Portal → Human reviews and takes action

+1 Task

Agent performs task → Logs to Portal → Automatically updates CRM/Calendar/System

+2 Tasks

Agent performs task → Logs to Portal → Updates 2 systems simultaneously

600+ System Integrations Available

Advanced Tasks can connect to any of our 600+ integrated systems, allowing your agents to automatically update the tools you already use.

CRM Systems

- Salesforce
- HubSpot
- Pipedrive
- Zoho CRM
- Microsoft Dynamics

Productivity

- SharePoint
- Google Drive
- Notion
- Asana
- Monday.com

Analytics & Data

- Mixpanel
- Amplitude
- Segment
- Google Analytics
- Tableau

Communication

- Gmail
- Outlook
- Slack
- Microsoft Teams
- WhatsApp Business

Support & Ticketing

- Zendesk
- Freshdesk
- Intercom
- Help Scout
- ServiceNow

And Many More...

- DocuSign
- PandaDoc
- Mailchimp
- Twilio
- +590 more systems

Calendars & Scheduling

- Google Calendar
- Outlook Calendar
- Calendly
- Acuity
- Square Appointments

Payments & Billing

- Stripe
- QuickBooks
- Xero
- FreshBooks
- PayPal

Common Advanced Task Examples:

- Update Salesforce contact after call
- Create HubSpot task from email
- Book Google Calendar appointment
- Send Slack notification to team
- Update Zendesk ticket status
- Create Stripe payment link
- Upload file to SharePoint
- Trigger Mailchimp email sequence

6. Example AI Agent Configurations

STANDARD #19

Call Recording Analyst

Analyses recorded calls to identify opportunities and quality issues

Core Capabilities:

- › Listens to all recorded calls
- › Spots missed sales opportunities
- › Grades call answering quality by team
- › Identifies complaints or churn risk
- › Calculates opportunity value
- › Logs high-value opportunities in Portal

✦ Available Advanced Actions:

- ✦ Creates follow-up tasks in CRM
- ✦ Updates deal records with insights

ADVANCED #1

Intelligent Inbound Call Agent

End-to-end call handling with automated follow-up across multiple systems

Core Capabilities:

- › Answers incoming phone calls
- › Captures all customer information & requirements
- › Generates personalised PDF brochure
- › Multi-channel distribution (WhatsApp + Email)
- › Updates CRM with complete interaction

✦ System Connections:

- › **Phone System** - Receives calls
- › **Document Generator** - Creates PDF
- › **WhatsApp Business API** - Sends brochure
- › **Gmail/Outlook** - Emails brochure
- › **Salesforce/HubSpot** - Updates contact

🔄 Complete Workflow:

Customer calls → Agent answers & gathers info → Creates custom brochure → Sends via WhatsApp & Email within 60 seconds → CRM updated automatically → Sales team gets notification

Company Research & Outreach Agent

Autonomous prospect research with multi-source intelligence gathering

Core Capabilities:

- › Monitors news for company announcements
- › Analyses Companies House data (financials, directors)
- › Scans LinkedIn & social media presence
- › Creates detailed company analysis report
- › Drafts personalised outreach message
- › Scores opportunity potential

System Connections:

- › **News APIs** - Monitors announcements
- › **Companies House** - Computer Use scrapes data
- › **LinkedIn API** - Company & people data
- › **Social Media** - Computer Use extracts posts
- › **CRM** - Creates opportunity & logs research

Uses Computer Use Agent

Browser automation for Companies House & social media (no APIs needed)

Complete Workflow:

Detects company announcement (funding round, expansion, new hire) → Pulls Companies House financials & director info → Analyses LinkedIn company page & key contacts → Scans social media for brand sentiment → Generates 2-page research report → Drafts personalised outreach email referencing specific insights → Creates high-priority opportunity in CRM with all research attached

7. AI Agent Team Examples

1 Voice/Call Team

12 Agents 24/7 Active

Manage every inbound and outbound call

- › Qualifications & Transfer
- › Customer Voice Agent
- › Lead Voice Agent
- › Outbound Appointment Booking
- › Data Scrape Survey
- › Voicemail Monitoring
- › Welcome Calls
- › Payment Collection
- › Appointment Confirmation
- › Abandoned Carts

4 Scheduling Team

11 Agents 24/7 Active

Optimize appointments & time usage

- › Document Request
- › Appt/Meet Assistant
- › Calendar Synchronization
- › Waitlist Manager
- › Appointment Confirmation
- › Appointment Rescheduling (ASAP)
- › Outbound Appointment Booking
- › After Hours Response

2 Email/Messaging Team

11 Agents 24/7 Active

Handle all written communication

- › Email Triage
- › Whatsapp/SMS Agent
- › Email Composer
- › Abandoned Form Recovery
- › Personalized Newsletter
- › Lead Nurture Sequences
- › Prospect Outreach
- › Online Translator

5 Experience Team

11 Agents 24/7 Active

Enhance every customer touchpoint

- › Referral Request
- › Holiday Milestone
- › Birthday Messages
- › Candidate Scheduling
- › Employee Feedback
- › Service Reminders
- › Demo Invitation
- › Always Request
- › Reactivation
- › Post-Incentive Survey
- › Abandoned Calls

3 Analyst Team

7 Agents 24/7 Active

Turn data into actionable insights

- › Email Communication Analyst
- › Call Recording Analyst
- › Sentiment Tracking (Positive)
- › Sentiment Tracking (Fraud)
- › Sentiment Tracking (Chit)
- › Sentiment Tracking (Vendor)
- › Repeat Opportunity Identifier

6 Strategic Team

9 Agents

Leverage data into customer lifecycle

- › Contract Renewal Management
- › Market Research
- › Competitive Intelligence Monitor
- › Product Usage Optimization
- › Cross-Sell Opportunity
- › Technical Troubleshooting
- › Data Quality Maintenance
- › Compliance Monitoring

AIOS Pilot

AI Pilot Programme (formerly ‘AI Activate’)

Our AIOS Pilot Programme is a comprehensive, 60-90-day initiative designed to help businesses seamlessly integrate AI into their operations. It’s more than just a technical solution—it’s a **strategic introduction to automating and optimising key workflows**, unlocking efficiency, and driving business growth.

Key Features

1. AI Upskilling for Senior Team (Pilot 2 & 3)

Equip your board, senior leadership and key staff with the knowledge and skills needed to understand, manage and deploy AI technologies within your firm. Training covers AI fundamentals, governance, and real-world applications tailored to your needs.

2. Strategic Business Process Analysis

We work with your team to analyse your current workflows and identify key areas where AI can deliver immediate impact to improve communication efficiency or reducing manual and repetitive tasks. This is supported by a thorough understanding of your business needs and goals.

3. AI Agent Pilot Deployment

Following the initial analysis, we deploy AI agent pilots to tackle selected challenges. This pilot, or pilots, provide(s) measurable results and valuable insights, allowing you to experience the benefits of AI automation first-hand.

4. 60-Day Roadmap

The programme is 60-90 days. By focusing on proven AI technologies that are simple to deploy, we ensure you start seeing immediate benefits, from cost savings to increased productivity.

AIOS Pilot Programme Pricing

Cost	Pilot 1 (Standard Agent) - £5,000
	Pilot 2 (2 Standard or Advanced Agents) - £10,000
	Pilot 3 (3 Standard or Advanced Agents) - £15,000
Duration	60-90+ days
Deliverables	A fully operational AI pilot in a sandboxed environment delivering measurable results and a clear roadmap for further AI integration as per the Service Description.