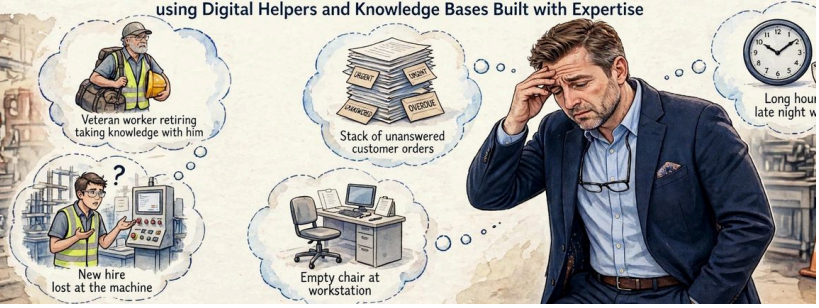




MKP: a complete business platform with tireless digital helpers and self-improving expert knowledge bases.

DRAFT — FOR REVIEW

MKP

MAX KNOWLEDGE PLATFORM

The Complete Business System

Everything your business runs on — records, screens, helpers, and knowledge — in one system, built to be simple and easy to use.

- **One system for the whole business** — sales, operations, people, money, and knowledge in one place, not five tools
- **Built in Axes** — at the center, the Business System runs the whole operation; around it sit five Axes, one for each working part of the business
- **An Axis** is a complete working part of the business — start with one, add the rest when you are ready
- **Built on Odoo** — the business platform run by 28M users and 21,000 partners worldwide; your records live in one system of record, not in scattered copies
- **Every screen shows live business data**, refreshed every five minutes
- **Digital Helpers work inside the system** — they propose, humans decide
- **Your knowledge stays yours** — data, knowledge base, and exit included
- **Plain screens, plain words** — built for the plant floor and the front office
- **Works where your team already works** — Microsoft 365, Slack, or Google
- **Honest by design** — if the data is not there, the screen says so; nothing is made up
- **Clear by construction** — functions on pages 2–3, features on page 4, outcomes on page 7

The Functions — What MKP Does

A **function** is what the system does — an operation it performs. Pages 2 and 3 are the complete function inventory: the Business System at the center, the five Axes around it, then the helpers and the capture. Each part mirrors its Odoo counterpart one-to-one — same menus, same fields — in simpler screens. The **features** — the characteristics that set MKP apart — are on page 4.

The center — Max Business System

- **One record for the whole business** — every part below reads and writes the same data, entered once
- **Contacts** — every customer, supplier, and person in one directory, the record everything else points at
- **Inventory** — stock, transfers, and replenishment across your locations
- **Purchase** — vendor quotes and purchase orders in the same flow as stock
- **Planning** — crew and site work run as shifts: schedule, worksheet, and materials on one job, billed through the order behind it
- **Project** — jobs and projects with their tasks, time, and margins visible
- **Documents** — the company's files organized with the records they belong to
- **Employees** — your people, their roles, and their skills in one place
- **Invoicing** — bills out and payments in, on the same records as the work
- **Accounting** — the books themselves: statements, taxes, and the close — no re-keying

Sales and Marketing Axis — Max Sales and Marketing

- **CRM** — every lead and opportunity on a pipeline your team will actually keep current, with the follow-ups attached
- **Quotes and orders** without the spreadsheet detour
- **Subscriptions** — recurring plans, renewals, and upsells handled on schedule
- **eCommerce** — your web shop sells from the same stock and prices as everything else
- **Email Marketing** — campaigns run from the same customer list; no separate mailing tool
- **Helpdesk** — customer tickets answered, tracked, and held to their service levels

Manufacturing Axis — Max MES

- **Manufacturing orders that flex** — split a big order across machines or shifts, and let the next operation start on partial quantities instead of waiting
- **Work orders** on a board and a schedule — drag, drop, done
- **PLM** — bills of materials under change control, so the floor always builds the current version
- **Maintenance** — equipment requests and planned upkeep, with downtime and repair reporting built in
- **Repairs** — repair jobs tracked as their own orders, from intake to done
- **Simple screens for the floor**, live from the same records

The Functions — Improve, Learn, Assist, Capture

The second half of the function inventory: the Axes that improve, teach, and decide — then the helpers and the capture.

Quality and Improvement Axis — Max Quality and VSM Tools

- **Quality checks where the work happens** — at the machine, at receiving, at the operation
- **Problems captured, assigned, and closed** — not lost in email
- **Value-stream views** that show where time and material are wasted

Learning Axis — Max Learning and Training

- **Courses and training records** for every employee
- **New hires learn your procedures**, your way
- **See who is trained on what** — at a glance

Strategy and Leadership Axis — Max Strategy and Leadership

- **Goals and numbers** leadership reviews in one place
- **Charts that read clearly** — trends as trends, stages as pipelines
- **Decisions recorded** where they were made

Digital Helpers — assist

- **One helper for each Axis** and each part of the Business System — answers come from your records, not the internet
- **Every helper has a declared set of skills** — what it may read, draft, or change, listed up front; every helper starts read-only
- **Helpers prepare records and updates as drafts** — ready for a human to approve
- **Helpers run on a schedule** — a morning chase list, a weekly rollup — and the Chief of Staff helper coordinates the others across the business
- **Helpers work from your procedures, lessons, and documents** — their sources are declared, not just your transactions

Interaction Capture — turn conversations into records

- **Meetings, calls, email, and chat are captured** under the consent rules that apply to you — through Teams and Outlook in Microsoft shops, through Slack and Google in others
- **Transcripts and recordings are harvested before they expire**, and stay in your own storage — referenced, never copied away
- **Every interaction is matched to the right customer** — or queued for a human where it can't be
- **Odoo receives a short summary with links** — never a transcript dump
- **Signals are pulled out as proposals** — commitments, deadlines, risks, buying signs, open issues — each quoting its source
- **Some things cannot be captured** — personal phones, other companies' meetings — said plainly

The Features — What Sets MKP Apart

A **feature** is a characteristic — how the functions are delivered. Underneath: a brain (Odoo, your system of record), a heart (a live mirror, running in your KB), and hands (the screens and helpers).

Always current — never stale

Every screen reads a live mirror of your one record, refreshed every five minutes — and every record carries its own conversation, not buried in email.

Rides on: every function — all read the same record, so no screen quotes yesterday's number

Honest by design

If data has not arrived, the screen shows a gap — never a made-up number, and no sample data dressed up as real. Beyond a connection — a warehouse aisle, a crew on site — the platform's own apps work offline and sync when back; a screen that cannot, never promises it.

Rides on: every screen and every helper answer — the gaps become the work list, not a surprise

Helpers propose — humans decide

Digital Helpers propose. Humans decide. Every write waits for a human approval.

Rides on: the helper functions — an approver sees exactly what will change first

Gates in the system, never in a prompt

The safety gates live in the system — in code, not in instructions a helper could talk its way around. Every write runs through one named, governed action — the same for a person's click, a helper's proposal, or a schedule's trigger.

Rides on: the helper write functions — helpers start read-only; writing skills are added one at a time, on your word

Works where your team works

One governed app in your shop's own tools — Teams and Copilot, or Slack and Google — a different front door, the same records (page 5).

Knowledge that verifies itself

Every entry carries an owner and a check date, and is re-checked on a schedule (page 6). Procedures carry live numbers — today's figures, not last quarter's screenshot.

Seen only by those allowed

People see only what Odoo's own permissions allow — captured material stays permission-trimmed.

Prewired, not projects

Every screen is prewired to the mirror — new views and Axes turn on by configuration, not projects.

Exit in open formats

Your data and knowledge export in open formats; a checklist revokes our access.

Works Where Your Team Works

Shops run on Microsoft, or they don't. MKP meets either world — the same brain, the same records, a different front door.

Microsoft shops — Teams and Copilot

- **One governed app inside Microsoft Teams** — helpers, alerts, and approvals in the chat your team already uses
- **Microsoft 365 Copilot asks the same brain** — it never keeps a second copy of your data
- **Decisions made in the chat land back in Odoo** — Teams is the room, not the record
- **Approvals happen on cards in the conversation** — approve, and the record updates

Non-Microsoft shops — Slack and Google

- **The same governed app inside Slack** — helpers, alerts, and approval cards in your channels
- **Google Workspace connects the same way** — Gmail, Google Meet, and Google Chat
- **On Slack, client rooms can include your customers** — with the helper in the room
- **Client meetings run on Google Meet**, whichever path you are on

Everywhere

- **The web app is the system of action** — every path leads to the same records
- **Nothing lives only in a chat** — chats point at the record, the record is the truth
- **One platform to learn**, whichever tools your team already has

A Self-Improving Expert Knowledge Base

How your company works — written down, owned, checked, and always getting better. It is the memory your helpers think with.

Governed, not dumped

- **One knowledge base of record** for how your company works
- **Every entry has a named owner** and a verification date
- **Entries are re-checked on a schedule** — knowledge ages on purpose, not by accident
- **Templates keep every entry the same shape** — findable and readable
- **When a lesson changes a procedure**, the lesson links to the procedure it changed

Knowledge the helpers can trust

- **Helpers answer from verified entries first** — you can see what an answer rests on
- **Your company knowledge is kept separate** for your company alone — never mixed, never shared
- **New knowledge is promoted in through review** — nothing drifts in unnoticed

What It Does for the Business

The functions do the work. The features set MKP apart. Together they are built to greatly increase five things — and every claim below names its mechanism, so you can see exactly where the increase comes from.

Productivity

- **Helpers draft from live data** — the quote, the rollup, the chase list prepared for your team
- **Capture logs the meeting and the call itself** — nobody re-types the conversation into the CRM
- **One record, entered once** — no re-keying the same order into sales, operations, accounting
- **Scheduled helpers work overnight** — the morning chase list is ready when the day starts

Knowledge in the company

- **Know-how in the governed knowledge base stays** when people retire, resign, or go on vacation
- **Approved facts compound** in a living knowledge base for each customer — not in an inbox
- **Lessons link to the procedures they changed** — the fix and its reason travel together

Clarity and transparency

- **One live record** — the office, the floor, and the helper all quote the same number
- **Every signal carries its verbatim quote** — evidence you can check, not a summary to trust
- **The open-commitment list shows every promise**, to whom, by when — still open, in plain sight
- **Approvals and changes leave an audit trail** — who approved what, and when

Rate of growth

- **Commitments spotted in today's call become follow-ups today** — that follow-up speed wins work
- **A lesson changes the procedure itself** — improvements stick, and spread to every site
- **New hires learn procedures** from the knowledge base and the Learning Axis — not only by shadowing
- **New capabilities turn on by configuration** — growth isn't gated on the next IT project

Profit and valuation

- **Work the team chased by hand is drafted for them** — capacity grows before headcount has to
- **One record means fewer errors and less rework** — and rework is margin walking out the door
- **Know-how becomes a documented, verified company asset** — not something carried in a few heads
- **Clean records and audit trails** remove the unknowns buyers discount for in diligence

Getting Started

We set it up. You run your business. Adoption comes in phases, and AI earns its write access step by step.

How adoption runs

- **Foundation first** — your records clean and in Odoo; we audit the data before anything is built on it
- **Screens and the live mirror next** — your team sees live data early
- **Helpers start read-only**; writing comes later, one skill at a time, on your approval
- **Capture turns on channel by channel** — consent and notices in place first

Your part — four simple habits

- **Turn transcription on** for meetings
- **Hold customer conversations in named channels**, not scattered threads
- **Review the week's signals** — a short weekly habit keeps the system honest
- **Name one owner on your side** — systems stick when someone owns them

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