

## Chatbots Answer Questions. Agents Do Real Work

A **chatbot** takes a prompt and returns an answer. Useful, but limited: you still copy-paste the output, reformat it, and start from scratch next time.

An **agent** is different. It has tools: it can edit files, navigate directories, or connect to external systems.

**But here's the catch:** an agent is only as good as the folder it operates in. Without clear instructions and organized context, the output won't be as good as it can be nor reliable. That foundation is what ZPT builds.

**Example:** A typical due diligence process takes a team 1 to 3 weeks of tedious, repetitive manual work: pulling documents from the data room, cross-referencing public filings, summarizing financials, flagging risks, and assembling it all into a memo. A chatbot can help with ad hoc tasks along the way. An agent operating in a well-built directory can run the entire process end to end and produce a strong first draft. The team uses it as a starting point and spends time on higher-value work.

Tools like Claude Code, Codex, Claude Desktop, and Microsoft Copilot can all run this kind of workflow, as long as the foundation and guidelines are in place.

## Foundation First

```
your-company/
├── CLAUDE.md                ← Instructions for the AI agent
├── company-context/
│   ├── overview.md         ← Who you are, what you do
│   └── terminology.md      ← Industry-specific terms and definitions
├── skills/
│   ├── analyze-documents/  ← Skill: document analysis
│   └── draft-memo/         ← Skill: memo generation
├── templates/
│   └── memo-template.md    ← Output formatting standards
└── example-docs/          ← Real inputs and outputs for reference
```

Building a folder that agents can operate in is more art than science, and every organization's looks different. Once the foundation is in place, new workflows can be added over time.

## Who This Is For

- **Organizations of 5 - 500 people:** Large enough for gains to matter. Small enough to move fast.
- **Leadership that wants to be AI-forward:** Decision-makers are willing to invest time in adoption and ready to designate at least one internal AI champion who learns the directory and keeps it alive day-to-day
- **Repeatable workflows that can be automated:** Document analysis, data extraction, report generation, prospect research, presentations, and more. The specific use cases vary by company, but there need to be processes where an agent can save meaningful time.

## How We Engage

Most engagements start with Discovery, then move into Build once there is a clearer sense of where agents add value.

<p><b>HALF-DAY</b></p> <p><b>Education</b></p> <p>Hands-on workshop on AI fundamentals: key concepts, what agents can and can't do, and live tool demos.</p>	<p><b>1-2 DAYS</b></p> <p><b>Discovery</b></p> <p>ZPT comes on-site, interviews the team, and maps key processes. We set up the foundation directory, surface the highest-value workflows, and get the team onboarded to the tools.</p>	<p><b>1 – 10 DAYS</b></p> <p><b>Build</b></p> <p>ZPT extends the directory with automated skills, templates, and tool connections for the workflows identified. Together with your team we test using real data and can stay on through regular check-ins.</p>
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Each engagement produces a working system, not a report or a set of recommendations.

## Why ZPT

- **Foundation is the unlock.** Agents only produce reliable output when they sit inside a well-structured directory. ZPT brings a battle-tested starter directory that has worked at firms of different sizes and industries, with the guidelines, context patterns, and templates most organizations need built in. We adapt it to your workflows, so you skip months of trial and error.
- **Educational, not black box.** ZPT works alongside your AI champion throughout the engagement, and the agents themselves are instructed to explain key concepts to anyone using them. Your team learns the system as they use it, can extend the directory, and is equipped to onboard new members after we leave.
- **AI-agnostic, fully owned.** The directory works with Claude, Copilot, Codex, or whatever comes next. ZPT helps you pick the combination that matches your security policies. All instructions, data, configurations, and API keys live on your accounts.

## What You Own at the End

- A custom directory built for your organization's workflows
- Tested "Skills" that your team runs independently
- All instructions, data, configurations, and API keys on your own accounts
- A trained team who can leverage the power of AI tools

## Where the Directory Lives

The directory is a folder that can be zipped and shared with anyone on the team. For ongoing use, it makes sense to store it in a centralized location. GitHub is the recommended option (version-controlled, easy to update). SharePoint, Google Drive, Dropbox also work. We recommend designating a person to manage the directory and keep it organized.