



PUREENERGY SYSTEMS

Practical AI systems for operational scale

Onboarding Command Center

Client handoff + workflow orchestration

PROBLEM

Client onboarding often breaks down after the sale. Handoffs live across email threads, spreadsheets, memory, scattered tasks, and repeated follow-ups.

SYSTEM CONCEPT

Turns onboarding into a visible operating system for client stages, document gates, task ownership, risks, kickoff coordination, activity visibility, and delivery readiness.

WORKFLOW

- 1 A client enters the onboarding workstream
- 2 Status and handoff gates are tracked
- 3 Documents are requested, received or waived
- 4 Tasks, risks and missing information are surfaced
- 5 The client moves toward delivery-ready status

PUBLIC-FACING CAPABILITIES

- Dashboard
- Pipeline visibility
- Task ownership
- Document gates
- Risk checks
- Activity tracking

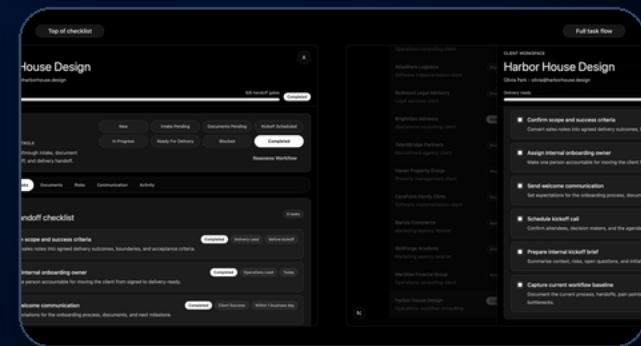
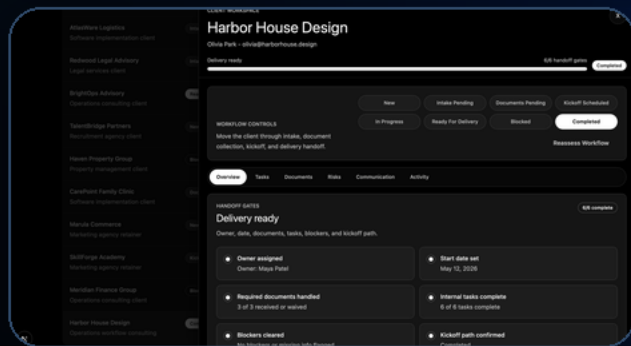
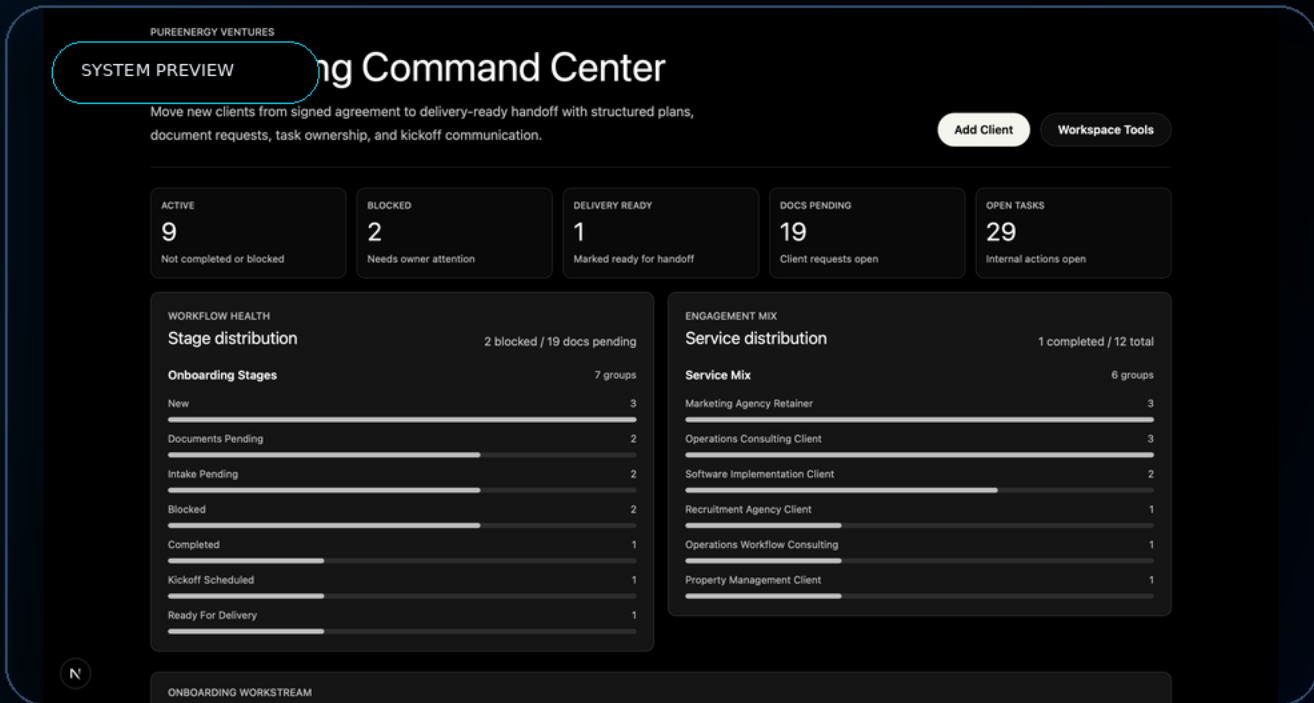
WHY IT MATTERS

Prevents handoff gaps, improves accountability, and moves clients from signed agreement to delivery-ready with more control.

Privacy/IP: sanitized portfolio demo using demo data. Shows product thinking without exposing client information or sensitive implementation details.

Live demo: <https://onboarding.pureenergy.systems>

Website: <https://www.pureenergy.systems>



Next step: Operational Intelligence Audit

Map the workflow, identify friction, and define the practical system to build next.