

Your business, running on intelligence.

We design and deploy AI workflow systems that connect the tools you already use — from first customer contact through delivery and follow-up. Not off-the-shelf software. Not a chatbot. A maintained operational intelligence layer, configured around how your team, your processes, and your industry actually work.

Your operations. Your data. Your rules. One platform maintained by Acumen.

Growing companies don't need another tool to log into — they need fewer manual steps, faster response times, and a system that keeps moving when the owner isn't in the room. Our systems are designed to help teams capture leads faster, respond faster, and close faster — freeing bandwidth for the work only you can do.

CAPABILITIES CONFIGURED AROUND YOUR OPERATION

Agentic Lead & Client Intake

AI-powered pipeline handles inbound calls and web inquiries, qualifies the opportunity, and builds the client file automatically. Leads can be in your system before your team touches them.

Intelligent Email Triage

Auto-routing, classification, and AI-drafted responses tuned to your brand voice. Drafts routed for human review based on the approval workflow we configure with you. Audit trail across the workflows we build.

Document & Contract Intelligence

Extracts key clauses, summarizes obligations, and flags defined terms or deviations for authorized human review. Legal and risk determinations remain with the client's professionals.

Live Voice Agent

AI answers inbound calls 24/7 — captures intake, schedules consultations, answers FAQs, escalates to staff. Callers can be met with a consistent professional experience at every hour. Missed calls become captured leads.

Workflow & Pipeline Management

Jobs, projects, or matters tracked from first contact through completion — urgency-scored, deadline-flagged, alerts routed to the right person. One command-center dashboard tuned to your operation.

Operations & Performance Dashboards

Live reporting across the metrics that actually move the business — revenue, pipeline, response times, team load — organized by role, visible at a glance.

Human-in-the-Loop by Design

Human oversight is engineered into every workflow we build. AI handles the heavy lifting; approval gates and escalation rules are configured per system so your team makes the decisions that matter. Audit trails track actions, timestamps, and attribution across the workflows you deploy.

Built by an operator, not merely a technologist.

Acumen AI is anchored by Bree Garrett — a senior operator with thirty years across IT, finance, operations, and consulting. She built Acumen AI to solve the operational bottleneck she was living herself. Our team combines her operator experience with AI systems expertise — every capability we build gets tested and refined in our own operating businesses first.

HOW IT WORKS

STEP 01

Discovery & Audit

We map your workflow end-to-end: how work comes in, how it moves, where time is lost. You get a detailed build plan scoped to your business before anything is built.

STEP 02

Configured Build

System configured around your business — integrated with existing tools and tuned by role, against the workflows we mapped in discovery.

STEP 03

Scenario Testing & Launch Validation

We run your system against a written scenario suite before go-live — ambiguous inputs, escalation boundaries, required disclosures, and whether the correct record lands in your systems.

STEP 04

Deploy, Train & Support

Full deployment on managed cloud infrastructure — or inside your own AWS account where data sovereignty requires it. We train your team, manage the transition, and provide ongoing support on monthly retainer.

SECURITY & DATA HANDLING



Cloud Architecture

Managed cloud infrastructure, with client-hosted AWS deployment for regulated verticals



Compliance-Supporting Controls

Architecture and controls selected to support applicable regulatory and contractual requirements. Vendor assurances, eligibility, and required agreements are confirmed during discovery.



Role-Based Access

Owners, managers, and staff operate in their own permissioned environment. Everyone sees what they need. Nothing more.



Audit Logging

Action logging, timestamps, and attribution across the workflows we deploy



Data Handling

Data flow architected per engagement — where sensitive data lives is defined during discovery

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You retain ownership of your business data, configurations, and operational logic. Acumen retains its reusable platform and IP. Exact terms defined in your engagement agreement.

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