

A 73-year-old family business now runs its whole leadership team on one AI operating system

How a third-generation office-equipment dealer went from information scattered across a dozen systems to a leadership team where every leader has their own AI agent, sharing one company brain.

6 leaders working in the OS every week	1,018 team messages to their agents in 30 days	123 deals tracked in the pipeline	\$10K a year saved by replacing licensed document software	6,018 documents read and indexed, ~100 more a week
Founded: 1953	Ownership: 3rd generation, family	Team: ~26	Business: Sharp Platinum dealer · managed print · document management · office supplies	Runs on: EOS

The problem

ABM had good people and good systems. The trouble was that the answers lived in all of them at once: the dealer ERP (e-automate), the EOS scorecard in Ninety, a CRM, email, spreadsheets, a document-management system, and people's heads.

- **The pipeline lived in an archaic CRM.** Finding out where a deal stood meant digging through it, and the deal was only there if a rep had entered it properly. The software set the rules, and the team adapted to it.
- **Documents were a cost with no payoff.** ABM paid about \$10,000 a year to license a document-management system, and every scan still took about a minute of hand-indexing. Years of packing lists, service contracts and sales documents sat in a system that couldn't talk to anything else.
- **Meetings didn't turn into motion.** Weekly L10s produced good decisions, but turning them into follow-ups, summaries and accountability was manual.
- **Sales work started from scratch every time.** Each proposal, competitive comparison and lease calculation was rebuilt by hand.

What they built: one brain, an agent for every leader

ABM didn't rip and replace anything. They followed the Nexus **X → XY → Y** path: keep the systems of record (X), route the work through the OS (XY), and let the OS become the front door (Y) one workflow at a time.

1. A head agent for the CEO, and an agent for each leader

Luke works through his own agent, which acts as the hub for the team. Each leader has their own agent with its own workspace: the Integrator (client services), Finance, Sales & Marketing, IT & Systems, and Accounting. All of them read from one shared company knowledge base. Private work stays private; company knowledge is shared. Leaders log in with a one-time email code (no passwords), and the agents can hand work to each other on a shared message bus.

2. Their own CRM, rebuilt on their terms

Instead of adapting to a CRM, ABM built the one they wanted. It's a private pipeline that only their team can see, built with the OS at no extra software cost, with 123 deals tracked. When Luke wants a change, he texts it and it's done, and they do this often. This year alone that has meant:

- A Prospect stage at the top of the funnel.
- A weekly gross-profit card on their own Monday-to-Monday reporting week.
- Reps seeing only their own accounts while managers see everything.
- A lobby display mode with commissions hidden.
- Email-address login.
- A business-analysis tool built in.

Leaders add and update deals by talking to their agent, and every deal can be queried alongside everything else in the OS.

3. Document Intelligence: replacing the legacy document system

ABM rebuilt the document software it had been licensing, and saves **about \$10,000 a year**. Its Sharp copiers, the same ones ABM sells, scan straight into a pipeline where AI reads every page, works out what the document is (packing list, service contract, sales document) and pulls out the fields people actually search for. Nobody indexes anything by hand anymore. **6,018 documents** have been read so far, with about 100 more each week.

Every one of those documents also lives in the OS. A single question can draw on the signed contract, the ERP's billing, the service history and the pipeline at once, and come back with one answer. When client services needs to know "who signed for this delivery?", it's a search, not a hunt. Accounts-payable automation is being built on the same foundation.

4. An operating rhythm that runs itself

- **Morning brief:** a one-page email at 7:00 every morning with the one most important thing, the week's focus, what's due, and a leadership prompt.
- **Meeting debriefs:** L10 transcripts become a designed debrief, an audio recap for the drive, and a pre-brief for the next meeting, with live scorecard and Rock status from Ninety.
- **Live service metrics on the website:** ABM's average service resolution time (currently 3h 49m, rolling 13 weeks) is pulled from the EOS scorecard and updated on abmfw.com automatically every week.
- **Alerts that find the right person:** anything a leader's agent flags for Luke is emailed to him within 15 minutes.

5. Sales work in hours, not days

In a recent competitive deal against a national brand, the OS produced, in one working session:

- A designed proposal with a cover letter, two scenarios, lease pricing at 60 and 72 months, and the 72-month savings.
- Research showing that one of the competitor's quoted models was already discontinued.
- A role-by-role "how this helps your team" section for the customer's staff.
- A custom webpage for the customer with how-to videos.
- An internal profitability report, and a draft email to the decision-maker.

The same engine writes RFP responses, rebuilds sales comp plans, and turns the ERP's books into industry-benchmark reports on demand.

6. A marketing agent behind a wall

A separate marketing agent handles blogs, social and search content. It is deliberately walled off from ABM's customer and financial data, and works only through the CEO's agent.

Results

Area	Before	Now
Where does a deal or issue stand?	Dig through an archaic CRM, if the deal was entered at all	Ask your agent; answer in seconds from the pipeline, scorecard and ERP
Indexing scanned documents	About a minute per document by hand, plus ~\$10K/year licensing	Automatic on Sharp + AI; 6,018 read, ~100/week; licensing gone
Leadership adoption	CEO-centric	6 leaders, 1,018 messages in 30 days
Meeting follow-through	Manual notes	Debrief + audio + pre-brief, tied to live Rocks and scorecard
Changing the CRM	Adapt to the vendor's software	Text the change; it ships the same day
Competitive proposal	Built by hand, piece by piece	One working session, with a custom customer webpage
Answers across systems	Separate systems, separate answers	Documents, ERP, pipeline and scorecard queried together

"We're a 1953 company. I didn't want to adapt to software. I wanted software that adapts to us. Now we rebuild our own tools by text, and every leader on my team has an agent that knows our business."

Luke Maucher, President, ABM Office Resources

Why it worked

- **It started with the CEO's own work**, then spread one leader at a time.
- **It kept the systems of record, and replaced what wasn't earning its keep.** e-automate, Ninety and email stayed, with the OS on top of them. The licensed document system and the old CRM were rebuilt the way ABM wanted them.
- **Every agent runs the same process:** what problem does this solve, and what outcome are we building toward? (OODA: Observe, Orient, Decide, Act.)
- **Private stays private.** Leaders have their own lanes; the marketing agent never sees customer data.