



# KEYSTONE

*The AI Employee Operating System for Service Businesses*

One platform. Every service vertical. Proven in production.

ARCH · LINTEL · SANCTUM · BUTTRESS · PORTICO · PLINTH

wolfberg.ai · keystoneflow.ai

THE PROBLEM · EVERY SERVICE BUSINESS

# Every service business. One loop. Run by humans.

*Intake to escalation — manual, expensive, impossible to scale. Across every vertical. The work that should be done by AI employees is still done by people.*



*Property management · Field services · Healthcare intake · Legal case management · Construction · Logistics*

The intake-to-resolution workflow is identical across all of them.

## Built pre-LLM

Legacy platforms were designed for workflow tracking, not intelligence. AI was added afterward — chatbots layered over relational databases on virtual machines.

## Point solutions fragment

A leasing bot here. A scheduling tool there. Each solves one narrow problem. None connect into a coordinated team of AI employees.

## Nobody started from scratch

No platform was designed post-LLM, serverless-first, with AI as the primary architectural constraint across all verticals, from day one.

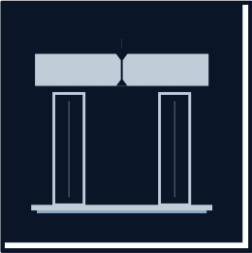
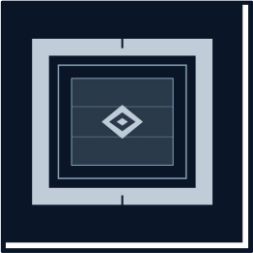
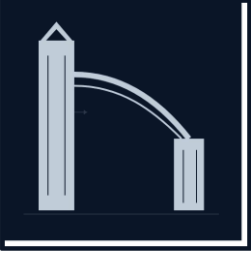

BOTTOM LINE

*The operational loop is universal. The infrastructure to run it as a team of AI employees does not exist. Until now.*

THE PLATFORM

# Keystone is the AI employee operating system.

Six modules. One platform. Every service vertical. AI employees are the workforce — the modules below are the runtime they live on.

 <p><b>Keystone Arch</b> <i>Workflow orchestration</i></p> <p>PRODUCTION</p>	 <p><b>Keystone Lintel</b> <i>AI employee runtime</i></p> <p>PRODUCTION</p>	 <p><b>Keystone Sanctum</b> <i>Data &amp; compliance</i></p> <p>PRODUCTION</p>
 <p><b>Keystone Buttress</b> <i>Resilience &amp; escalation</i></p> <p>PRODUCTION</p>	 <p><b>Keystone Portico</b> <i>White-label frontend</i></p> <p>IN BUILD</p>	 <p><b>Keystone Plinth</b> <i>Per-tenant configuration</i></p> <p>PHASE 2</p>

BOTTOM LINE

*Lintel is where AI employees live. The other modules are how they coordinate, escalate, and remember. The next slide names them.*

# Seven roles. One platform. Any service business.

Every service business runs on the same coordination work. Keystone runs it as a team of AI employees — each role configured for the vertical it serves.

<p><b>Concierge</b></p> <p>FIRST CONTACT</p> <p>AT WPM: <i>Tenant intake — issues, requests, questions</i></p>	<p><b>Steward</b></p> <p>COORDINATION</p> <p>AT WPM: <i>Maintenance triage, work routing, vendor mgmt</i></p>	<p><b>Liaison</b></p> <p>RELATIONS</p> <p>AT WPM: <i>Owner relations — portfolio updates, statements</i></p>	<p><b>Custodian</b></p> <p>CONTINUITY</p> <p>AT WPM: <i>Lease renewals — 90/60/30-day outreach</i></p>
<p><b>Bursar</b></p> <p>PAYMENTS</p> <p>AT WPM: <i>Rent — reminders, payment conversations</i></p>	<p><b>Quartermaster</b></p> <p>RESOURCE DISPATCH</p> <p>AT WPM: <i>Vendor dispatch — assignment, status, payment</i></p>	<p><b>Envoy</b></p> <p>NEW BUSINESS</p> <p>AT WPM: <i>Leasing inquiries — prospect intake, pre-qualification</i></p>	

BOTTOM LINE

Each role is a Claude agent with role-scoped data access and tool use. Available on web and mobile. Configurable per vertical via domain pack.

MARKET OPPORTUNITY

# The addressable market is much larger than one vertical.

Keystone's architecture is built to span all of them — same backbone, different domain pack.

# \$150B+

TOTAL ADDRESSABLE MARKET

Across 6 identified service verticals

**\$15B**

**Property Management**

300K+ operators · 48M units  
USE CASE #1 →

**\$52B**

**Field Services**

HVAC, electrical, facilities

**\$28B**

**Healthcare Intake**

Scheduling, triage, referrals

**\$22B**

**Logistics & Dispatch**

Last-mile, exceptions, routing

**\$12B**

**Legal Case Mgmt**

Intake, assignment, escalation

**\$18B**

**Construction Coord**

Work orders, subcontractors

BOTTOM LINE

Property management is the entry point. The same seven AI employees — different domain pack — run any vertical listed here.

# The cost structure is the advantage.

*Serverless-native by design — decided on day one, not day one thousand.*

## GETTING THIS ANY OTHER WAY

### **Build from scratch**

- ✗ 2–3 senior engineers × 12–18 months: \$500K–\$800K
- ✗ Always-on EC2/RDS infrastructure: \$800–2,500/month ongoing

### **License an enterprise platform**

- ✗ ServiceNow avg contract: \$130,000/year
- ✗ Salesforce Enterprise + AI add-ons: \$290+/user/month
- ✗ Implementation alone: \$30K–\$150K one-time
- ✗ Dedicated admin required: \$80–120K/year

Year 1 cost to get equivalent capability: **\$600K–\$1M+** (build) · **\$200K+** (license)

## KEYSTONE SERVERLESS ARCHITECTURE

- ✓ Lambda — pay per invocation, zero at idle
- ✓ Step Functions — serverless orchestration
- ✓ DynamoDB on-demand — scales to zero
- ✓ Bedrock — pay per token, no GPU instances
- ✓ AI model updates: automatic, no engineering effort

~\$5	~\$30	~\$200	~\$1.2K	~\$10K
1 door	10 doors	100 doors	1,000 doors	10,000 doors

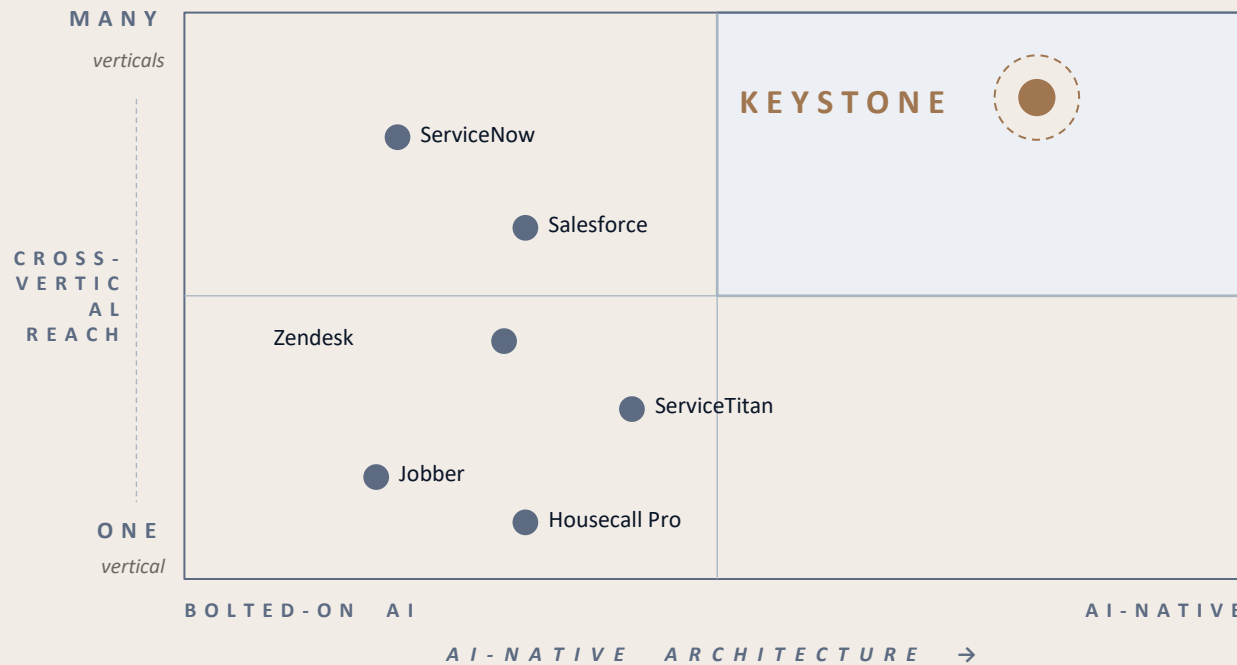
*Estimated monthly AWS cost. Bedrock (AI) is the dominant driver. All other services approach zero at idle.*

**Implementation timeline: Days, not months.**

COMPETITIVE POSITION

# What exists — and why it falls short.

Every incumbent started from workflow software. Keystone started from AI employees.



THE KEYSTONE QUADRANT

## Upper right is empty.

*AI-native architecture and cross-vertical reach are not features incumbents can ship next quarter. They're architectural decisions made on day one — or not.*

- **AI-native from day one**  
Every workflow step is a Claude agent decision. Not a chatbot bolted on top of forms.
- **Domain pack architecture**  
Same seven AI employees, configured per vertical. Built once, deployed everywhere.
- **Serverless cost basis**  
\$5–\$1,200/month operational. 14× cheaper than incumbents. Structural, not promotional.

BOTTOM LINE

*Nobody else is in the upper-right quadrant. AI-native and cross-vertical are architecture decisions, not features.*

# Built to federal security standards.

*Designed to NIST SP 800-171 Rev 3. Deployed on FedRAMP High-inherited AWS. A documented security package ships with every license.*

## WHAT KEYSTONE DELIVERS

- ✓ AES-256 encryption at rest — AWS KMS customer-managed keys, auto-rotation
- ✓ TLS 1.2+ encryption in transit on all endpoints
- ✓ RS256 asymmetric JWT authentication verified against live JWKS
- ✓ Multi-tenant data isolation enforced at API and data layer
- ✓ FedRAMP High-inherited controls — AWS us-east-1 deployment
- ✓ Role-based access: admin / owner / tenant / maintenance
- ✓ CloudWatch audit logging with DLQ failure alerting

## SECURITY PACKAGE — EVERY LICENSE

### System Security Plan

Fully documented SSP mapped to NIST SP 800-171 Rev 3. Operators inherit Keystone's security architecture from day one — not month six.

### Inherited Control Matrix

Pre-mapped FedRAMP High controls inherited from AWS us-east-1. Collapses your compliance assessment timeline from months to days.

### Plan of Action & Milestones

Transparent POA&M covering open items and remediation schedule. No surprises during your security review.

U S E    C A S E    N<sup>o</sup>    1

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**Greti is what you see.**  
***Keystone is what you're looking at.***

*The next five slides show Keystone applied to property management — through Greti.*

# Property management is the perfect proving ground.

## UNIVERSAL WORKFLOW

Every PM company runs the exact same loop. Keystone's seven AI employees map cleanly onto it — no customization required. The pattern is solved.

## UNDERSERVED AT SCALE

300,000+ operators in the US. Most are small businesses priced out of enterprise software or running on tools built before AI existed.

## EXTREME COST ARBITRAGE

AppFolio charges \$280/month minimum. Keystone runs the identical workload for cents per door per day. Structural gap — not a promotion.

## BOTTOM LINE

*Property management proves the model. Every other vertical is the same backbone with a different domain pack.*

# The property manager's world today.

*Manual coordination at every step. At every hour. At every scale.*

## **2:47 AM — you're the dispatcher**

Pipe burst. You're on the phone, texting plumbers from personal contacts, following up manually. Every emergency lands on you.

## **Intake is a second job**

Texts, voicemails, emails — all landing in different places. Someone misses something. That someone is you. Scale makes it worse.

## **Growth means adding chaos**

Each new door multiplies coordination overhead. Hiring staff is expensive. Staying small means leaving revenue on the table.

**8–12**

*hrs / week*

Coordination overhead per 10 doors

**1 in 5**

*requests*

Fall through without a system

**\$40–80K**

*per year*

Equivalent labor cost at 10 doors

BOTTOM LINE

*This is the PM operator's reality today. Greti — built on Keystone — is what it looks like after.*

# Greti — Keystone applied to PM.

A bespoke PM platform built on Keystone. Operated by Wolfberg Property Management, Northern Virginia.

## G R E T I

Wolfberg PM's instance of Keystone

### THE AI TEAM RUNNING WPM

- **Concierge** Tenant first contact — issues, requests, questions
- **Steward** Maintenance triage and work coordination
- **Liaison** Owner relations — portfolio updates, statements
- **Custodian** Lease renewals — 90/60/30-day outreach
- **Bursar** Rent — reminders, payment conversations
- **Quartermaster** Vendor dispatch — assignment, status, payment
- **Envoy** Leasing inquiries — prospect intake, pre-qualification

• LIVE IN PRODUCTION. NOT A DEMO.

~\$5–\$30

PER MONTH

1–10 doors, all-in AWS cost

14x

COST ADVANTAGE

Over AppFolio at 10 doors

0

INFRASTRUCTURE INCIDENTS

Since production deployment

100%

AI TRIAGE

Claude Opus 4.7 via Bedrock

### BOTTOM LINE

Greti is Keystone's AI workforce in property management. The next vertical changes the vocabulary — the seven roles are identical.

# Same property manager. Completely different operation.

*Keystone underneath. Greti on top. Seven AI employees handling what used to need a back office.*

## WITHOUT GRETI

- ✗ Phone calls and texts at all hours
- ✗ Manual coordination for every request
- ✗ Contractors via personal contacts
- ✗ Tenants with no visibility into status
- ✗ Owner updates when you remember
- ✗ Emergencies discovered after the fact
- ✗ Growth capped by personal bandwidth

## WITH GRETI ON KEYSTONE

- ✓ **Concierge** handles intake 24/7 — conversationally, no form
- ✓ **Steward** triages, dispatches, routes multi-trade jobs
- ✓ **Quartermaster** assigns vendors, tracks status, confirms work
- ✓ **Liaison** keeps tenants and owners informed at every step
- ✓ **Custodian** runs lease renewals automatically
- ✓ **Bursar** handles rent reminders and payment questions
- ✓ **Envoy** fields leasing inquiries and pre-qualifies

## BOTTOM LINE

*This is what licensing Keystone looks like in PM. Different vertical, different vocabulary — same seven AI employees.*

# The use case is proven.

*Now here's why you should care.*

7

**AI EMPLOYEES IN PRODUCTION**

*Concierge, Steward, Liaison, Custodian, Bursar, Quartermaster, Envoy. Each a Claude agent with role-scoped data and tool use.*

14x

**COST ADVANTAGE OVER INCUMBENTS**

*AppFolio minimum: \$280/month. ServiceTitan: \$400+. Keystone: \$5–30 at small scale. Same capabilities. Structural gap.*

100%

**AI ON EVERY INTERACTION**

*Claude Opus 4.7 via Bedrock on every conversation. Not a bolt-on. Not a pilot. The production system.*

**BOTTOM LINE**

*Greti answered every question about whether Keystone works. It does. What follows is the business.*

T H E   B U S I N E S S

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**The use case is proven.**  
***Now here's the business.***

*How Keystone licenses, where it goes, who it's for.*

# What you get when you license Keystone.

*You bring vertical expertise. Keystone provides seven AI employees and the operating system that runs them. You'd spend 18 months and \$500K+ building this from scratch — the license gives you a production-proven platform on day one.*

## INCLUDED IN EVERY LICENSE

- ✓ Seven AI employees — configured for your vertical via domain pack
- ✓ Full intake, triage, dispatch, and notification workflows
- ✓ Emergency escalation — SMS + voice, with retry
- ✓ White-label portal — your brand, your UX
- ✓ Per-tenant SSM config — your rules, your settings
- ✓ Ongoing infrastructure and AI model updates

## WHY THE ADVANTAGE IS STRUCTURAL

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### ***Serverless-native from day one***

Cost scales with usage, not infrastructure. Zero cost at idle. No competitor reaches this by patching their existing stack.

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### ***AI employees, not AI features***

Workflow tools have AI. Keystone has AI workforce. The difference shows in every interaction the customer has with your business.

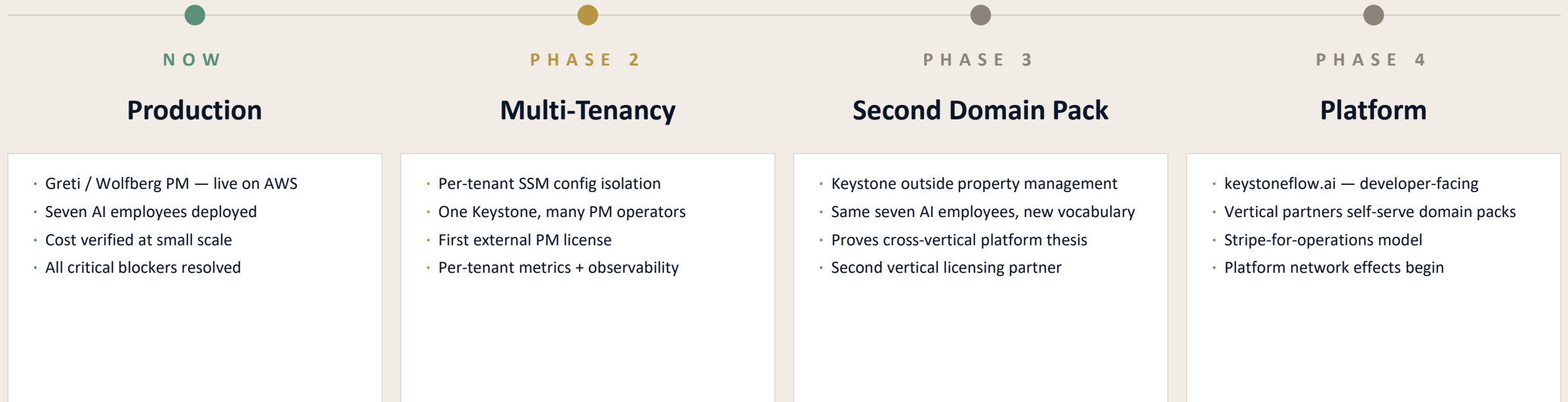
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### ***Built once, licensed to many***

Greti proved the model. Each new vertical adds a domain pack — not a rebuild. The moat widens with every deployment.

# Where this goes.

*Greti is Phase 1. The platform scales from here.*



THE BUILDER

# BERGMAN (Berg) P. ATKINSON

*Founder, Wolfberg LLC · Architect, Keystone*

25 years building things that work in environments that can't afford them not to. Defense programs. Intelligence systems. Billion-dollar acquisition strategy. The kind of infrastructure that gets depended on by people you never meet, in situations you'll never know about.

*That background produces specific instincts. Build for load, not for demo. Design for the day it's depended on, not the day it's reviewed. Make it invisible when working.*

*Keystone is those instincts applied to a problem that has been underserved for twenty years.*

*linkedin.com/in/bergatkinson*

## Chief Engineer

*ABMS Digital Infrastructure Consortium*

One of five chief engineers across a five-company consortium. Shaped \$4B+ in DoD acquisition strategy. Directly supported \$303M+ in contract awards.

## Korean Linguist

*Defense Language Institute*

Certified cryptologic linguist, US Air Force intelligence. DLI is one of the most selective language programs in the world. The foundation of a career built on precision.

## Advisor to Three CTOs

*Leidos — \$20B corporation*

Defense Sector · Commercial & International · Homeland. Brought in across all three to resolve high-stakes ambiguous problems — before commitments become irreversible.

## American Mensa

*High IQ Society — top 2% globally*

M.S. Information Technology Management. Harvard Business Publishing — Leading for Impact. AWS Solutions Architect. Five continents.

THE ASK

# Why this matters to you. How to engage.

*Keystone is a licensing opportunity, a platform investment, and a first-mover position.*

## VERTICAL OPERATORS

### License Keystone for your vertical.

*You run a service business. You're doing manually what Keystone does automatically with seven AI employees. Configured to your vocabulary, your rules, your brand.*

- Seven AI employees on day one — not 18 months
- 14x cost advantage over existing SaaS incumbents
- AI-native from intake to escalation, fully automated

White-label portal your clients never know is Keystone  
 START A LICENSING CONVERSATION →

## PLATFORM BUILDERS

### Build vertical SaaS on Keystone.

*Keystone is the AI workforce infrastructure you don't have to build. Ship your vertical app in weeks, not 18 months. You bring the domain pack.*

- Skip the infrastructure build — it's already proven
- Focus on your vertical's domain, not the plumbing
- License the platform, own the vertical relationship

Plinth multi-tenancy enables your SaaS business model  
 REQUEST A TECHNICAL DEEP-DIVE →

## INVESTORS & PARTNERS

### First-mover position is open.

*Production-proven AI workforce platform with a clear licensing thesis. The structural cost advantage is structural, not promotional.*

- Live in production — no pilot, no deck-only claims
- \$150B+ TAM across 6 identified service verticals
- Cost basis creates durable competitive moat

Founder with 25 years of infrastructure credibility  
 SCHEDULE A FOUNDER CONVERSATION →

berg.atkinson@gmail.com · wolfberg.ai · keystoneflow.ai

**The infrastructure exists.**

**The proof is in production.**

**The structural advantage is permanent.**

**The first-mover advantage is now.**

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**K E Y S T O N E**

*wolfberg.ai · keystoneflow.ai*



A P P E N D I X

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# *Technical Detail*

*For technical diligence.*

- A · Keystone Platform Architecture
- B · Technology Stack
- C · Cost Model Detail
- D · Security & Compliance

# Six modules. One architecture.

Every vertical uses the same set — only domain pack configuration changes.



## Keystone Arch

*Workflow Orchestration*

Step Functions state machines + EventBridge orchestration. Every workflow step is an AI decision point. The complete operational structure.

PRODUCTION



## Keystone Lintel

*AI Employee Runtime*

Owens the Claude agent loop, tool use, conversation state, and system prompts for every AI employee. Bedrock Converse under the hood. Intake was just the first one.

PRODUCTION

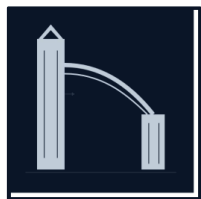


## Keystone Sanctum

*Data, Security, Compliance*

Cognito PKCE auth, DynamoDB on-demand, SSM SecureString, CORS enforcement. Audit trail and tenant data isolation.

PRODUCTION



## Keystone Buttress

*Resilience & Escalation*

Emergency detection → immediate voice (Twilio) + SMS (SNS) escalation with 10-minute retry loop until acknowledged. Nothing falls through.

PRODUCTION



## Keystone Portico

*White-Label Frontend SDK*

React 18 + TypeScript + Vite. Tenant and operator portal. Currently Greti-branded. White-label parameterization is Phase 2.

IN BUILD



## Keystone Plinth

*Per-Tenant Configuration*

SSM Parameter Store config layer. Holds the domain pack. Currently hardcoded to Greti / Wolfberg PM. Full per-tenant isolation is the Phase 2 unlock.

PHASE 2

# AWS technology stack.

*100% serverless. Terraform-managed IaC. Zero always-on compute.*

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## AI EMPLOYEE RUNTIME

- AWS Bedrock — Claude Opus 4.7 via cross-region inference profile
- Bedrock Converse API — multi-turn conversation per agent role
- Type-safe response normalization per role: schema-validated outputs

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## ORCHESTRATION

- AWS Step Functions — workflow state machines (Keystone Arch)
- EventBridge — operational event bus across the platform
- SQS + Lambda — worker queue and async execution

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## DATA & STORAGE

- DynamoDB on-demand — zero cost at idle (Keystone Sanctum)
- S3 — document and asset storage per tenant
- SSM Parameter Store — SecureString domain pack config (Keystone Plinth)

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## AUTH & ACCESS

- Cognito — PKCE flow, JWT enforced on all protected routes
- IAM — least-privilege Lambda execution roles
- Lambda-level CORS origin validation

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## COMMS & ESCALATION

- SNS — email and SMS notifications
- Twilio — voice escalation, 10-min retry loop (Keystone Buttress)
- SES — warmed-up transactional email with branded voice

# Cost model — detailed breakdown.

*Estimates based on serverless scaling characteristics. Bedrock (AI) is the dominant variable cost. All other services approach zero at idle.*

SERVICE	BILLING MODEL	1 DOOR	10 DOORS	100 DOORS	1 K DOORS	10 K DOORS
<b>AWS Lambda</b>	Per invocation + duration	<\$0.50	~\$1.50	~\$5	~\$40	~\$350
<b>AWS Step Functions</b>	Per state transition	<\$0.50	~\$3.00	~\$10	~\$80	~\$700
<b>DynamoDB on-demand</b>	Per read/write unit	<\$1.00	~\$6.00	~\$20	~\$150	~\$1,300
<b>Bedrock (Claude AI)</b>	Per token consumed	~\$2.00	~\$15.00	~\$120	~\$700	~\$6,500
<b>SNS / SES</b>	Per message	<\$0.10	~\$1.50	~\$5	~\$30	~\$250
<b>Twilio (voice)</b>	Per call minute	<\$1.00	~\$5.00	~\$30	~\$150	~\$1,200
<b>Cognito / IAM / S3</b>	Minimal at this scale	<\$1.00	~\$3.00	~\$8	~\$20	~\$80
<b>TOTAL (estimated)</b>		~\$5	~\$30	~\$200	~\$1.2K	~\$10K

*All figures in USD per month. Bedrock costs scale with conversation depth and request volume — primary variable cost driver.*

# Security posture — detailed.

*Verified technical controls. Honest scope. Certification roadmap.*

## PROVABLE CLAIMS — AVAILABLE NOW

- ✓ **NIST SP 800-171 Rev 3** — Designed to standard. SSP, POA&M, and control matrix documented and available.
- ✓ **AES-256 at rest** — AWS KMS customer-managed keys. Automatic annual rotation.
- ✓ **TLS 1.2+ in transit** — All endpoints. HTTPS enforced. No plaintext transmission.
- ✓ **RS256 JWT authentication** — Asymmetric. Verified against live JWKS on every protected request.
- ✓ **Multi-tenant isolation** — Enforced at API gateway (CORS + JWT) and data layer (partition keys).
- ✓ **FedRAMP High inherited** — Deployed on AWS us-east-1. FedRAMP High authorization controls inherited.
- ✓ **RBAC — 4 roles** — Admin / owner / tenant / maintenance. Least-privilege Lambda execution.
- ✓ **Full audit trail** — CloudWatch on all Lambda executions. DLQ alerting on failure.

## NOT YET — PATH DOCUMENTED

- **NIST 800-171 Compliant** — Requires formal third-party assessment (3PAO). Not yet completed.
- **FedRAMP Authorized** — Requires P-ATO from federal agency sponsor. Architecture ready; process not started.
- **CMMC Certified** — Requires C3PAO assessment. Not yet initiated.

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## CERTIFICATION ROADMAP

- NOW** SSP + control matrix documentation complete
- NEXT** Engage 3PAO for NIST 800-171 formal assessment
- PHASE 3** FedRAMP authorization via federal agency sponsor