

# **[CLIENT X] Kick Off + Third South**

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August 2026

# Hello and Welcome!

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**We're excited to be here — and to work with you**

## **FORMAT FOR TODAY**

- We'll present for about 5-10 minutes
- We'll do an interactive demo discussion with you for 15-20 minutes
- We will work together on potential follow ups

*Thank you for taking the time to be with us*

## Brief Introduction to Third South

**A diversified, permanent holding company — a partnership of former business leaders, software professionals, and investors**

### Holdings

We own and operate seven portfolio companies

### Labs

We incubate and test new ideas

### Services

We partner with firms like Wolf to deploy AI, build custom software tooling, and advise on business processes and workflows

**Everyone on our team is a daily user of a broad set of AI tools. We don't outsource any development or technical work to third parties**

# Our Philosophy Around AI

## Support, not replace

AI to *support* human beings, not to replace them

## Human in the loop

Human-in-loop is core to how operations run

## Tools, not slides

We deliver working tools in production, not presentations

## Competency stays at [CLIENT X]

AI training and capability should reside with your team. Integrating with *existing* tools (when possible) is a win. Another login to another system adds complexity

# Project Intro / Harness Basics

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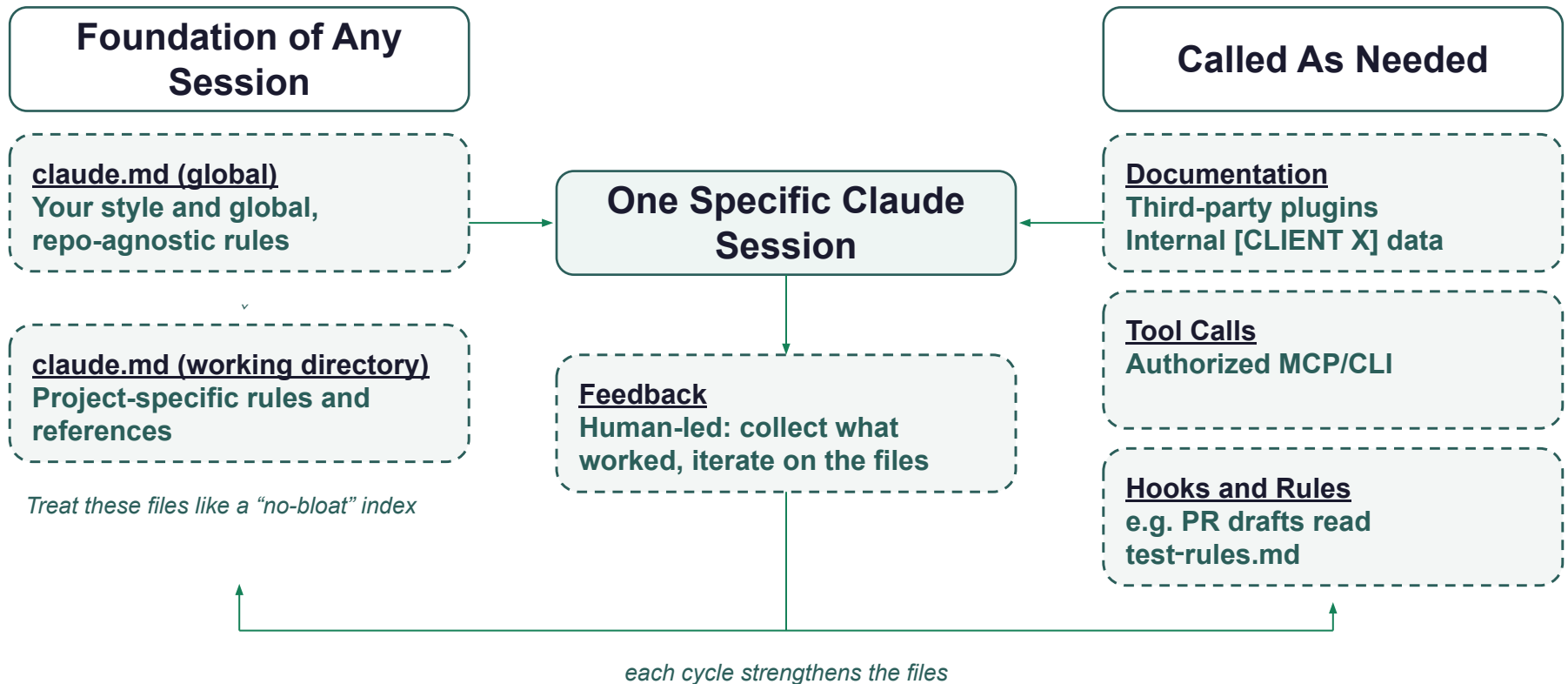
## Before We Start

**[LEADERSHIP TEAM] have asked us to:**

- Work with you all across a few sessions to deliver application of best practices
- Discuss how Third South uses AI internally
- Work with you all to understand the [CLIENT X] environment
- Co-author deployable tools and best practices for your team

*We recognize that the deployment and use of Claude CLI varies across your teams already*

# The End State: A Harness That Improves With Use



# Continuing to Build Around the Harness

## One Specific Claude Session

Hi – can you help me solve a problem today?

Reads Claude.md and working directory Claude.md

Yes – *how can I help?*

I need help with the Authorize.net integration

Reads relevant other files

*[iteration]*

Draft the PR for the solve

Reads relevant other files

*[iteration]*

## Called As Needed

### Documentation

How to work with third party plugins

How to retrieve internal [CLIENT X] data

### Tool Calls

Approved and authorized tools like MCP and CLI

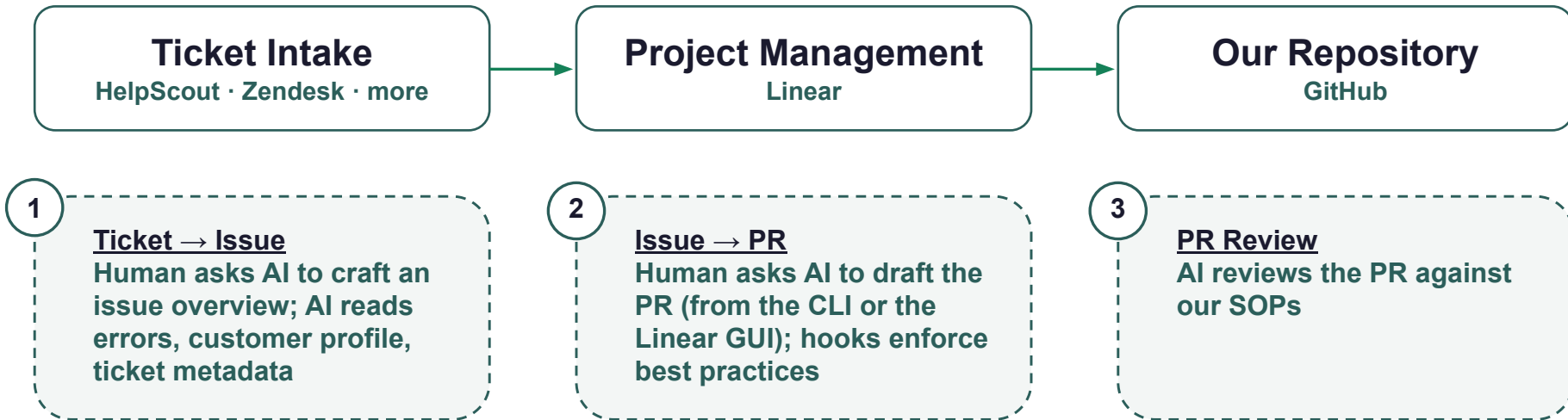
### Hooks and Rules

Situation specific, e.g. “each time I draft a PR, make sure test-rules.md is read and applied”



# Our Environment

We built this for our own stack. Let's work with you to build something similarly helpful



# S.W.A.T. Training

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Creating an autonomous teammate using your CLI

## What we will cover

### Strategic

Requires **continuous improvement** to understand and solve your problems

### World-class

Requires **continuous improvement** to become what you wish

### Autonomous

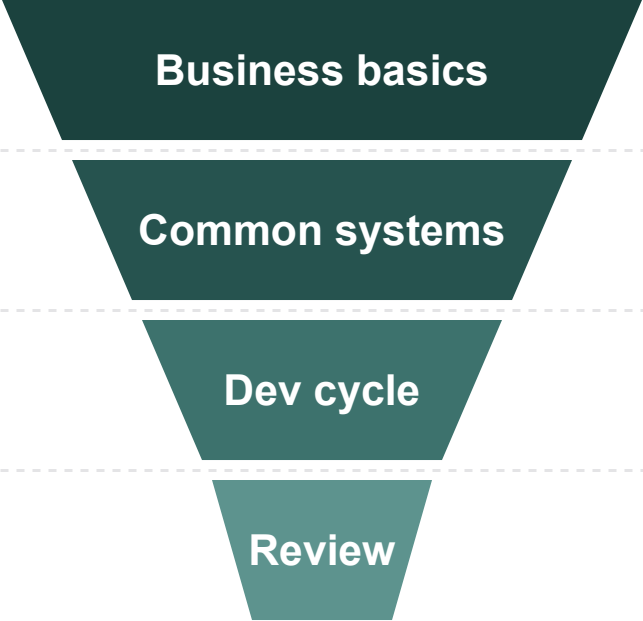
Requires internal team commitment and infrastructure to avoid humans being the bottleneck

### Teammate

Onboarding anything is **critical**, so we will focus on this

*It will be up to you to extend this further*

# Onboarding a new teammate



## Business basics

**Orientation to your business:** Who are you? Who are your customers? What matters and what doesn't?

## Common systems

**Connecting to key systems:** As a new employee, what do you need access to? What other context can I assist you with?

## Dev cycle

**Organizational and personal norms:** What procedures do we internally follow? What are preferences vs rules, and to who?

## Review

**Continuous Improvement:** Check-ins, improving, and getting feedback to become more effective

# Any questions?

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**Any questions before we dive in?**

# Appendix

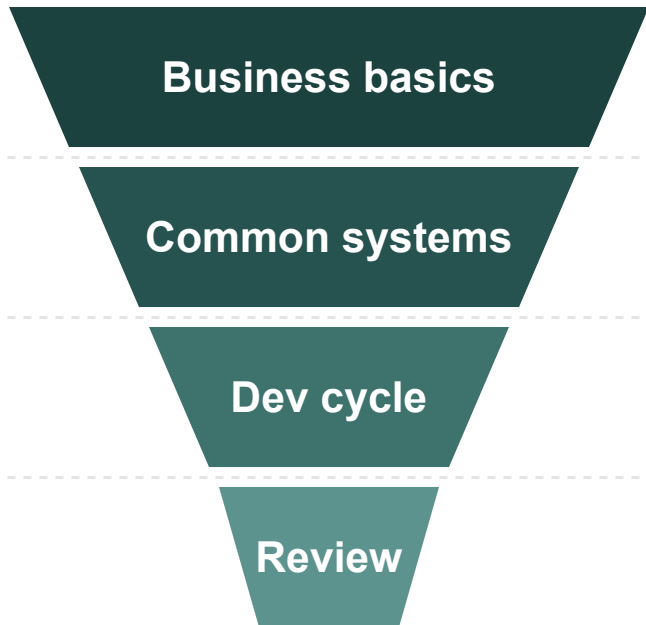
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## More Tips

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1. **Everything is a context problem**
2. **/goal - these are optimizing engines**
3. **Personal / Untracked files**

## Onboarding a new teammate: Actual Example



**Business basics**

**Orientation to your business:**

**Common systems**

**Connecting to key systems:**

**Dev cycle**

**Organizational and personal norms:**

**Review**

**Continuous Improvement:**



# Opportunities and Considerations

## Where we see strengths – and areas for deliberation

### Strengths of AI Tools (Representative Examples)

#### **Building Custom Tools**

Turn large, complex workflows into components which can ultimately be automated

#### **Context Delivery**

For customer service and field support, deliver the right kinds of context to people at the right time

#### **Data Analysis**

Evaluating complex (and sometimes messy) datasets to provide commercial or operational intelligence

#### **Data Scraping**

Finding and prioritizing data about prospective customers, hires, or new products

### Areas for Deep Consideration

#### **Data Guardrails**

Need policies around sharing proprietary and customer data with LLMs, including HIPAA and PII considerations

#### **Avoiding Silos**

LLMs can create lots of outputs or tools that aren't naturally shareable or integrated

#### **Cost**

Certain tasks are not appropriate for frontier models

#### **Training**

Users may not be familiar with guardrails, policies, and cost considerations