



PROWESS

SCS
ADVISORY



CUSTOMER STORY

SCS automated a week-long quarterly workflow with AI that never leaves the building

An independent wealth-management firm gave its operations lead back a week of work every quarter using a local AI application that keeps every record on the lead's own Windows® PC.

~200 hrs/yr

of specialist time reclaimed annually

100%

of compute run locally on the employee's PC

100%

of client data stays on the local machine

The challenge

SCS Advisory's quarterly compensation calculations lived entirely in one operations lead's head, spread across five spreadsheets with no documented process, resulting in a full week of work every quarter. Cloud AI was off the table under the firm's data policy, and a SaaS tool would have just traded one bottleneck for another.

What changed

- **One-click execution:** Replaces a week of quarterly work, saving ~200 hours/year
- **Plain-English rule updates:** Made by the operations lead, no developer needed
- **Institutional knowledge captured:** 15+ years of tribal knowledge, now a maintainable ruleset
- **100% local data:** Satisfies the firm's cloud-AI prohibition
- **Key-person risk reduced:** Logic no longer lives in one person's head
- **Reusable pattern:** Ready for other specialist-bound workflows at SCS

The approach

Prowess Consulting used a frontier model once, during design, to extract the process into a paired plain-English rulebook and executable formula set. On-device models now handle rule updates from plain-English requests, with the operations lead reviewing every change before it runs, all in under a second, on her own machine.

"I still understand every calculation that's being made. The AI helps me update the rules, but I can review the logic before anything runs. That transparency was really important to me."

— Alisha Yonan, Operations Lead, SCS Advisory

Learn more



Reduce manual work. Increase productivity. Deploy production-ready agents in weeks, not months.

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