



# AX Portals

Outputs, sharing, and a shared workspace with your client

**Insight that arrives once is an event.**  
**Insight that stays is a relationship.**

AX Portals are where a diagnostic stops being a deck and becomes an interactive information source for the client. They are part of TheAX, the assessment and diagnostic platform. The findings, the data underneath them, the pathways being tracked and an AI that can answer questions about all of it sit in one workspace — branded as your consultancy and shared with the client.



#### PERSISTENT

**The work does not stop at the report**

Findings, data and tracked pathways stay live between engagements, instead of ageing in an inbox.



#### SHARED

**One workspace, both sides**

Consultancy and client work in one place. You decide what is shared and can see what your client sees.



#### BRANDED

**Your practice, not ours**

Branded for your consultancy. TheAX is the engine underneath, not the thing the client is looking at.



#### GROUNDING

**An AI that only knows your world**

It answers from your expertise and the client's data. Nothing else, and nothing invented.

## 01 · THE PROBLEM IT SOLVES

### THE REPORT

#### A moment

Findings

Read once

A PDF

Questions by email

No working shown

Ends



### THE AX PORTAL

#### A workspace

Findings

The data beneath

Pathways

Upload evidence

Ask anything

Both sides

## THE ENGAGEMENT STOPS BEING A DELIVERABLE

**A report is the end of a conversation; a portal is the conversation continuing and building over time.** The difference matters commercially rather than aesthetically: a client who can still see their position, their evidence and their trajectory six months on is a client with a reason to talk to you again.

#### Findings arrive once

A report is read in the week it lands and rarely opened again. The analysis that produced it is invisible, so the client is left holding a conclusion without its working.

#### You are the bottleneck

A number the client's stakeholders cannot interrogate becomes an email three weeks later. Senior time goes on re-explaining findings that are already written down.

#### Then it all stops

Between engagements there is no presence and no shared surface, so the next conversation starts from scratch instead of from where the last one finished.

## 02 · TWO WAYS TO PROVIDE A PORTAL

### Share what you found. Or hand them the instrument.

A portal is not one thing. The consultancy decides how far it goes, and the decision is commercial as much as technical.

#### MODE 01

##### Shared visibility

They see the work. They can question it.

Findings and position, the assessment data beneath them, pathways and targets. The client can ask the assistant and upload evidence on shared projects.

**What they cannot do is create assessments of their own.**



#### MODE 02

##### Shared, plus delegated

They see the work, and they can run it.

Everything in mode 01, and they run their own assessments too — from templates you choose to publish, across their organisations and locations.

**Every reading still lands on your model, your levels, your scale.**

Both branded as your practice. Both comparable, because both run on your Product Book.

**Mode two is where a client organisation starts assessing itself on your model.** They run the templates you have chosen to publish to them, across their own business units and locations — which means your instrument is in use in places your consultants were never going to reach.

## 03 · FROM ENGAGEMENT TO SUBSCRIPTION

This is the part that changes the shape of the business. A portal that a client logs into every month is not a deliverable that has been handed over — **it is a service, and it can be sold as one.**



##### A service, not a deliverable

A portal a client uses between engagements is something they pay for monthly rather than something they receive once. The relationship stops being a run of projects with gaps in between.



##### You decide what they can run

The consultancy publishes which templates the client may use. The scope of the subscription is a decision the firm makes, and one it can widen as the relationship grows.



##### Usage that improves the asset

Every assessment the client runs themselves feeds their own pathway and your benchmark set. The subscription earns revenue and makes the firm's data better at the same time.



##### Adoption you can see

Activity and questions asked are visible to the consultancy, so a subscription that has gone quiet shows up as a fact months before the renewal conversation does.

**Where each mode fits.** Mode one suits a single engagement where the client needs to see and question what was found. Mode two suits a group rolling a standard across business units, a multi-site client assessing its own locations, or a body measuring the organisations it accredits. Start in mode one and expand to mode two in line with your growing relationship.

## 04 · THE PORTAL

# Branded as your practice. Shared with your client.

### Your Consultancy

- Client portal
- Home
- Activity Hub
- Pathways**
- Discovery
- Assessments
- Organisations
- Contacts
- Library
- Team & access

VIEW AS **Client**

Ask TheAX

### Welcome back

Measure where you stand today, target what to improve, and track the outcomes you are driving toward — with your consultancy.

YOUR PATHWAYS

AI Transformation

**2.8** / 5.0

L3 · Productised

Cultural Wellness

**2.3** / 5.0

L2 · Process-Defined

IT Capability

**2.4** / 5.0

L2 · Process-Defined

Pathways, assessments, evidence and contacts in one place, under the consultancy's name. A client can be on several pathways at once — one for each area of expertise you support — each running on its own Product Book, with its own levels and its own trajectory.



### See the working, not just the answer

The client reads the findings and then opens the assessment underneath them — the diagnostic reading beneath it, with the evidence marked in place and the lens that set each level named.



### A genuinely shared workspace

Both sides work in the same place. The client uploads evidence on shared projects, the client can run their own repeat assessments. One source of truth for both sides.



### Several pathways at once

A client working with you on more than one front sees each programme on its own pathway, and the consultancy sees all of them together — one instrument, many readings.

## 05 · THE SAME WORKSPACE, FROM YOUR SIDE



### Every client, one structure

Each engagement runs in the same shape rather than in whatever arrangement the team improvised, so moving between clients costs nobody a week of orientation.



### Activity you can see

Who has responded, what has moved, what the client has been asking the assistant. A read on the health of an engagement without asking anyone for a status update.



### Access under control

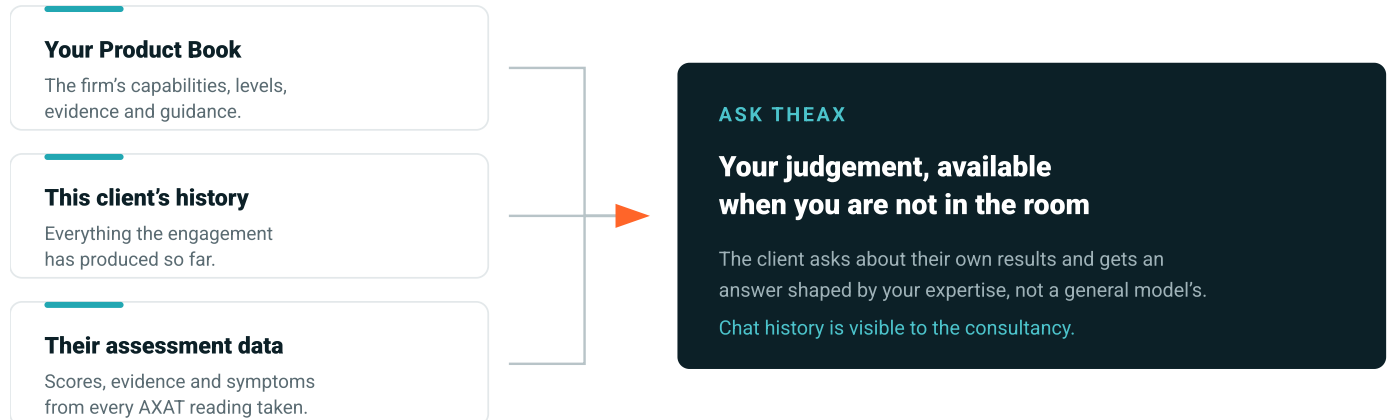
Access to who sees and does what is controlled by the consultancy, and can be delegated to the client to manage themselves — so what a person on the client side can see and do stays a decision the firm controls.

**What it asks of you.** A portal is only as useful as what is in it. The value shows up when assessments are re-read on a pulse and evidence is kept current, which is a habit rather than a feature — and worth agreeing with the client at the start rather than discovering at the first re-read.

## 06 · THE CLIENT-FACING AI

# An assistant that only knows **what your firm taught it.**

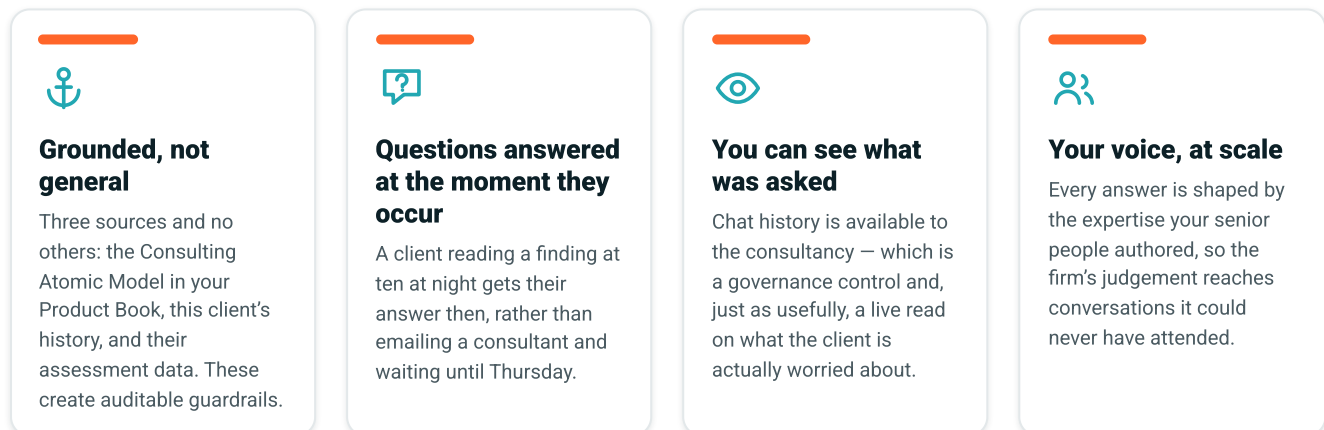
IT ANSWERS FROM THREE THINGS, AND NOTHING ELSE



It cannot answer from the open internet, from another client's data, or from anything it was not given.

This is the part that makes handing an AI to a client defensible. The risk with a general model is that it answers confidently from somewhere you have never seen. Here there are three sources and no others.

## 07 · WHAT THAT CHANGES



## Renewal starts on the day the report lands.

A client who can still see their position, their evidence and their trajectory six months later **does not need persuading that the work mattered** — they can see it. That is a different conversation from asking for a reference, and it happens in a space with your name on it.

## More on TheAX

Every part of the platform has its own fact sheet, and a walkthrough on a completed assessment is the quickest way to judge the method for yourself. Both start at the website.  
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FIND EVERYTHING AT  
**theax.ai**