



Charlo

Your Frictionless
Teammate.



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What is Charlo Studio?

Charlo Studio

Your people spend hours buried in documents reading, extracting, cross-referencing, drafting.

Charlo Studio handles the heavy lifting.

Charlo Studio is a private AI platform built around human-led workflows and intelligent document search.

Purpose-built tools mine, map, analyse, and draft so your experts focus on judgement and decisions that matter.

Safety

Charlo Studio is built for organisations that take data security seriously.

Your data stays in Australia in Microsoft's Data Centres. It is never shared with third parties or used to train external models.

Our Values

Integrity over inertia - trust first, speed second

Orchestration over automation - you are the pilot

Utility over complexity - work shouldn't hurt



Business Impact



Speed

Convert hours of review, fact finding, digging and drafting into minutes

Expertise unlocked with Charlo Knowledge Agent

Move from the individual capability, to the collective expertise of the business

Consistent quality

Repeatable and standardised output regardless of who runs it or how busy the team is

Employee experience

Less hunting, admin and rework

More time on judgement, stakeholder engagement, and the parts of the job people actually enjoy

Human-led, always

Your experts make the decisions. Charlo Studio handles the assembly, extraction, and drafting that sits between raw inputs and finished work

How Charlo works for you



Word document output

Every workflow generates to Microsoft Word, using your branded templates. Consistent formatting, ready for review.

Self-service tools

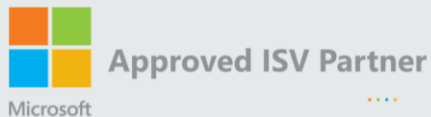
Subscription access to the full Charlo Studio platform. Your team loads documents, runs workflows, and controls access.

Enterprise deployment

For organisations ready to connect Charlo Studio to their SharePoint environment. Managed integration, your document libraries, our search engine.

Custom workflows

Not covered by an existing tool? We can build it. The same structured approach, tailored to your process.



What is a RAG Agent?

Charlo Knowledge Agent

Think of it as a research assistant that has read every document your organisation has ever produced.

RAG stands for Retrieval-Augmented Generation.

Instead of relying on general knowledge, a RAG agent searches your documents first, finds the relevant passages, and uses that information to answer your question.

It does not guess. It retrieves, then responds and tells you exactly where the answer came from

Four search modes working together

Keyword search	Finds exact matches for specific terms and phrases
Semantic search	Finds answers based on meaning, not keywords
Charlo Meta Graph™	Connects snippets to full document context for grounded answers
Contextual hop	Follows findings across documents, surfacing connections you might miss



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[charlo studio](https://www.linkedin.com/company/charlo-studio)

[james armitage](https://www.linkedin.com/in/james-armitage)

The word 'Charlo' in a stylized, colorful, cursive font. The letters are composed of various colored segments (orange, yellow, green, blue, purple) and have a slight 3D effect.

Charlo

Example tools

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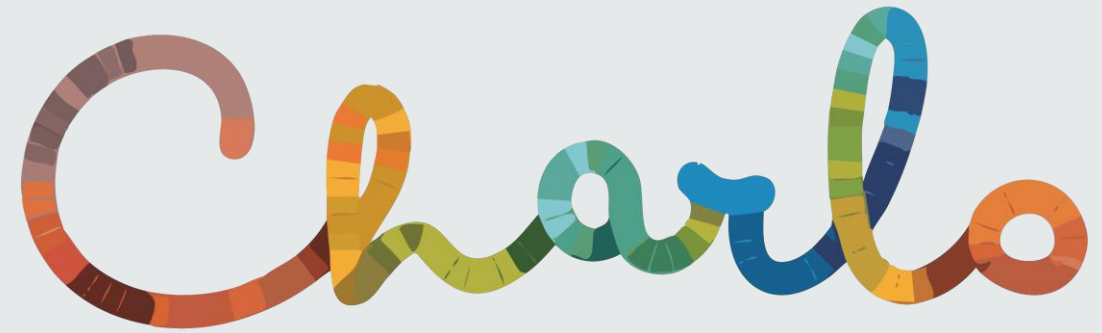
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RAG Agent, Enterprise Intelligence and Knowledge Base

Every organisation accumulates expertise across documents, past projects, policies, standards, and reference material, but finding the right answer at the right time means knowing where to look and having the time to read. Whether it is historical IP, a live project's document set, or industry standards and regulations, the knowledge is there but rarely at your fingertips.

Charlo, your senior teammate, puts that collective knowledge within reach through intelligent search that understands meaning, follows connections between documents, and cites its sources so your people trust what they find. Two deployment options meet your organisation where it is, from self-service knowledge containers through to a full enterprise integration with your existing SharePoint environment.

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Charlo

Charlo Knowledge RAG Agent

Your organisation's documents, searchable by meaning, connected by relationship, and citable by source, all under your control.

Load your documents into knowledge containers and Charlo indexes them using semantic search, graph search, and contextual hop. Build containers for historical IP, for a live project's working documents, or for industry standards and regulations. Ask questions in plain language, receive cited answers, and generate structured outputs from your knowledge base.

- Semantic search that finds answers based on meaning, not keywords, so your team asks questions the way they think and gets the passages that actually answer them
- **Charlo Meta Graph™** Understands each passage in the context of its source document, including what it is, where it sits, and how it connects to the wider content. This helps the agent move from a useful snippet to the full section or document when needed, so answers stay accurate, grounded, and complete.
- Contextual hop that follows a finding in one document to related content in others, surfacing connections across contracts, policies, reports, standards, and correspondence
- Citation and source referencing on every answer, down to the specific document, page, and passage, so your team verifies and cites with confidence
- Multi-format ingestion covering PDFs, Word documents, and email, with intelligent chunking that preserves context and structure

Self-service and subscription-based. You create the containers, load the documents, and control the access. Charlo, your senior teammate, makes the knowledge findable, so your people spend their time using expertise, not hunting for it.



Charlo Enterprise Connect RAG Agent

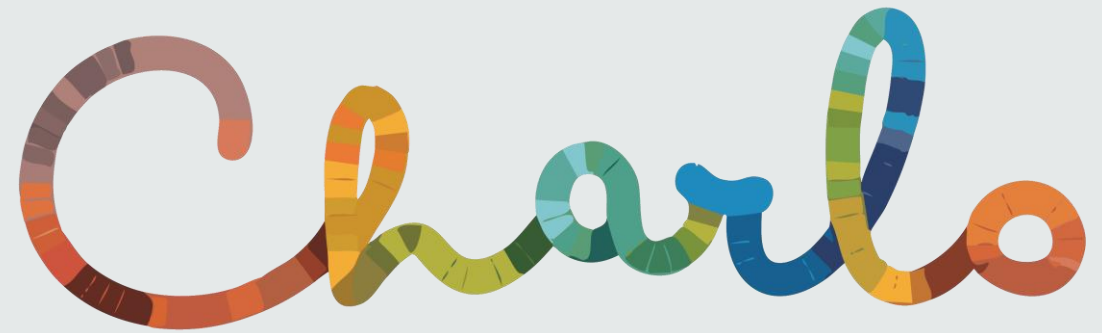
Your SharePoint document folders, transformed into an intelligent knowledge base, with semantic search, graph search, and contextual hop across everything your organisation has stored.

Charlo Enterprise Connect deploys directly into your SharePoint environment via an enterprise agreement. No manual uploads, no duplicate storage. Your existing document libraries become searchable by meaning, connected by relationship, and citable by source.

- Semantic search across your target SharePoint folders, finding answers based on meaning so your teams ask questions in plain language and get cited passages, not keyword hits
- **Charlo Meta Graph™** Understands each passage in the context of its source document, including what it is, where it sits, and how it connects to the wider content. This helps the agent move from a useful snippet to the full section or document when needed, so answers stay accurate, grounded, and complete.
- Contextual hop that follows findings across documents and team boundaries, surfacing connections between contracts, policies, reports, standards, regulations, and correspondence that manual searching would miss
- Citation and source referencing on every answer, down to the specific document, location, and passage, so your teams verify and cite with confidence
- Multi-format support across everything in your selected SharePoint folders, with intelligent chunking that preserves context and document structure
- Structured reports, and summaries generated on demand from your knowledge base, turning distributed information into usable output

Deployed on Australian soil, with your data never shared or used to train external models. Charlo, your senior teammate, connects the collective expertise already sitting in your SharePoint environment to every person in your organisation who needs it.





Building and Construction

Construction professionals lose hours to document-intensive tasks, tenders, project plans, contract reviews, claims, that demand precision but bury the expertise that should be driving outcomes.

Charlo, your senior teammate, handles the reading, structuring, and drafting across purpose-built tools so your people focus on the judgement and decisions that move projects forward.

Charlo Docs Proposal Assistant

Convert days of tender assembly into a structured first-cut built on your organisation's collective expertise, ready for expert review.

Upload your RFP and Charlo takes it from there reading the document, mapping every requirement, searching your knowledge base for the strongest evidence, and writing a first cut proposal response grounded in your actual track record.

- Extracts project details, client requirements, evaluation criteria, and submission structure directly from the RFP
- Searches your organisation's knowledge base past proposals, case studies, team CVs, and reference materials through a dedicated RAG agent, so every bid draws on the collective expertise of the business
- Maps every client-requested section alongside standard proposal sections, flagging overlaps and setting submission order
- Generates project-specific content for every section project understanding, methodology, risk, capability, key personnel, schedule, executive summary, and cover letter
- Handles client-specific custom sections, schedules, and attachments identified in the RFP
- Inserts TBC markers where evidence is unavailable rather than fabricating claims, with an internal QA register for bid manager review

You stay the pilot. Charlo takes on the reading, the mapping, the evidence retrieval, and the assembly so your experts spend their time where it counts: strategy, positioning, and the judgement calls that set your submission apart.



Charlean Proposal Mapping and RAG prompts

From an uploaded RFP to a complete Response Brief — every section mapped, every requirement extracted, and RAG prompts ready for your knowledge base.

Upload your RFP documents and Charlo reads the full set, maps every client-requested section, extracts deep per-section requirements, and assembles a structured Response Brief your bid team can act on before a word of the proposal is written.

- Extracts a structured RFP Snapshot – client, project, sector, deadlines, evaluation criteria and weightings, mandatory certifications, key dates, and submission requirements in one scannable table
- Maps every section, schedule, attachment, and form the client requires in the submission, with content types, word limits, and evaluation weightings preserved
- Extracts every requirement, question, deliverable, and compliance constraint per section – verbatim RFP text alongside plain-language translation with confidence scoring and gap flagging
- Identifies inputs needed per section with suggested owners, so your bid team knows who provides methodology, pricing, CVs, case studies, and certifications before the kickoff meeting
- Generates a pre-filled RAG contextual prompt and per-section RAG starter prompts that instruct your knowledge base to write draft content tailored to the project
- Delivers a Response Strategy with draft win themes, identified risks, and low-confidence sections requiring early attention

Your bid team makes the strategy calls. Charlo does the reading, the mapping, and the requirements extraction so your first planning meeting starts with the full picture, not a stack of unread documents.



Project Management Plan Assistant

Walk through twelve sections of project delivery with a structured questionnaire, and receive a first cut, document-grounded Project Management Plan without the blank-page start.

Upload your project documents contracts, briefs, programmes, cost plans, risk registers, WHS documentation and select your governance model. Charlo extracts answers to over 120 questions, pre-fills a questionnaire for your review, and drafts a full PMP once you confirm the inputs.

- A pre-filled questionnaire covering project overview, governance, scope, programme, cost, procurement, approvals, risk, WHS, quality, stakeholders, and environment extracted directly from your uploaded documents
- A conflict resolution engine that prioritises contracts over briefs, flags disagreements between sources, and assigns confidence levels to every answer
- A governance model selector that maps your chosen structure steering committee, project control group, or tiered to the appropriate forum pattern and reporting cadence
- A best-practice knowledge base of Australian construction standards, available to fill gaps with safe defaults when you opt in every assumption transparently recorded
- A first cut PMP drafted in full, with specific controls, responsibilities, and thresholds throughout not generic statements
- An open items register and evidence table per section, so your team knows exactly what still needs input and where every fact came from

You stay the pilot. Charlo takes on the reading, the mapping, the evidence retrieval, and the assembly so your experts spend their time where it counts: strategy, positioning, and the judgement calls that set your submission apart.



Sample PMP Assistant Template Matched

Your organisation's PMP format, applied to a new project without copying and pasting from the last job.

Upload a previous PMP as your structural template, add your new project's documents, and Charlo analyses the sample's format, generates a matched questionnaire, extracts answers from your project files, and drafts a first cut PMP that replicates your established structure with current data.

- A structural analysis of your sample PMP heading hierarchy, section naming, tone, detail level, and formatting conventions learned and applied to the new document
- A tailored questionnaire of 120 to 150 questions across twelve sections, derived from your sample's structure rather than a generic template
- Answers extracted from your uploaded project documents with conflict resolution and confidence scoring, presented in a pre-filled questionnaire for your review and editing
- A governance model selector steering committee, project control group, tiered, or matched to the sample that drives forum structures, reporting cadence, and escalation paths
- Optional PMO governance integration, so delegation thresholds, approval authorities, and stage gates from your organisational standards are built into the plan
- A first cut PMP drafted to match your sample's style, with front-matter tables per section documenting open items, assumptions, and evidence sources

You set the standard with your sample. Your senior teammate replicates the format and populates the content so your project managers deliver a consistent PMP without inheriting last project's data.



Proposal Pre-Start Assistant

Triage and Bid Intelligence

Before committing your team to a bid, know exactly what the procurement document demands across insurance, accreditations, financials, contract risk, scope, pricing, and evaluation criteria.

Point the Proposal Pre-Start Assistant at your RFP, RFT, or EOI and Charlo reads the full document set, triages coverage across twelve structured categories, and delivers a comprehensive assessment report with verbatim evidence for every finding.

- Before you assess insurance viability: professional indemnity amounts, tail cover requirements, liability caps, fitness-for-purpose obligations, and proportionate liability positions extracted with clause references
- Before you confirm accreditation fit: ISO certifications, state WHS prequalification, panel membership requirements, and professional registration thresholds all mapped against what the document specifies
- Before you commit resources: team composition requirements, minimum experience levels, CV format rules, office location mandates, and substitution restrictions surfaced before you start assembling a bid team
- Before you price the opportunity: fee model (lump sum, time and materials, percentage), payment terms, contract form, IP ownership, subcontracting rules, and performance-based fee structures laid out for your commercial team
- Before you plan your submission: deadline, format requirements, page limits, lodgement method, RFI cut-off, briefing dates, and evaluation weightings in one place
- When contract risk needs a second look: novation clauses, step-in rights, non-standard risk allocation, and unusual terms flagged with verbatim extracts for legal review

An At a Glance table gives your bid manager the full picture in thirty seconds. The detailed report behind it carries the evidence. Charlo your senior teammate does the reading; you make the call with the facts in front of you, not behind a deadline.



Consultant Agreement Assistant

From an uploaded consultant agreement to a structured risk assessment with verbatim extracts, clause references, and risk levels for every criterion you care about.

Upload your consultant agreement and its schedules. Configure the assessment criteria six are pre-built (liability, indemnity, insurance, IP, termination, payment), and you can add up to four of your own. Charlo reads the full document and delivers a comprehensive assessment report.

- When you need to understand liability exposure: caps, exclusions, proportionate liability, consequential loss positions, and fitness-for-purpose obligations identified and extracted with clause references
- When you need to assess indemnity risk: scope, mutual or one-sided application, unlimited indemnities, and carve-outs surfaced with the exact contract language
- When insurance requirements need checking: professional indemnity amounts, public liability, coverage duration, and run-off periods pulled directly from the agreement
- When IP ownership matters: who owns the deliverables, licensing arrangements, and background IP transfer provisions mapped from the contract and any schedules
- When you need the commercial picture: payment timing, invoicing requirements, withholding rights, set-off provisions, and termination consequences laid out for your commercial team
- When something specific to your engagement needs attention: add custom assessment queries and Charlo applies the same systematic search

An executive summary and risk overview table give your team the headline findings. The detailed assessment behind it carries the verbatim evidence. Charlo your senior teammate reads the contract; you decide what to escalate with the language already extracted, not still buried in a PDF.



EOT Assistant Claims Assessment

From contract clauses to a formal determination letter with structured analysis, decision guidance, and the assessor's judgement at every step.

Upload your head contract and the contractor's EOT claim pack. Charlo maps every time and EOT provision in the contract, extracts the claim details, analyses entitlement against the contract rules, and guides the assessor through each decision point to a drafted determination letter.

- When time bar compliance is the threshold question: notice triggers, required timeframes, content requirements, deeming provisions, and whether discretion exists all mapped from the contract with clause references
- When you need to understand EOT grounds: principal risk events, neutral events, conditions attached to each ground, and exclusions extracted and ready for the assessor to match against the claimed causes
- When critical path and concurrency need assessment: what the contract requires, what the claim presents, and where the evidence is strong, weak, or absent laid out for the assessor's judgement
- When delay costs are claimed: whether the contract allows them, the qualifying conditions, valuation methods, proof requirements, and any caps or exclusions surfaced before the assessor forms a view
- When liquidated damages are at stake: the LD rate, trigger events, caps, and how EOT decisions adjust the LD position connected to the assessor's EOT determination
- When the determination letter needs the right tone: firm and technical, balanced and neutral, or commercial and conciliatory the assessor chooses, and the letter follows

The assessor makes every decision. Charlo does the contract reading, the clause mapping, the claim extraction, and the letter drafting so the determination is grounded in the contract, documented in the record, and ready to issue.



Variation Assistant Claims Assessment

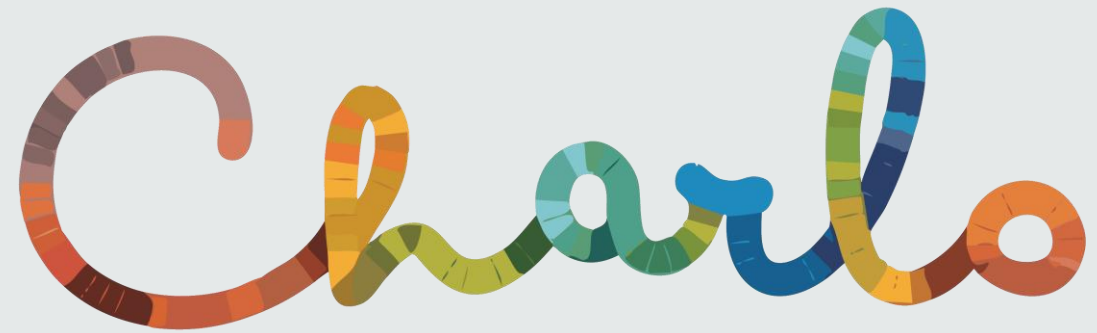
From uploaded contract and variation claim to a formal determination with the contract profile built, the claim structured, and seven decision helpers guiding the assessor's position.

Drop in your head contract and the contractor's variation claim. Charlo extracts the full contract profile, structures the claim details, analyses each assessment dimension, and produces a determination letter once the assessor completes the decision form.

- Extracts variation powers, valuation rules, notice requirements, time bar provisions, EOT triggers, delay cost entitlements, latent conditions, and dispute resolution with verbatim source clauses from the contract
- Profiles the variation claim: type (directed, contractor-initiated, latent condition, provisional sum), claimed amount, claimed EOT days, and supporting evidence
- Analyses entitlement and notice compliance against the contract rules, comparing the claimed position to the contractual framework
- Assesses quantum by mapping the claimed valuation approach against the contract's order of methods rates, dayworks, preliminaries, overheads, profit, deductions
- Examines time impact, EOT causation, concurrency, and delay cost entitlement where the variation carries a time claim
- Delivers seven parallel decision helpers entitlement, time bar, quantum, EOT, delay costs, risk, and tone so the assessor reaches each decision point with the relevant contract rules and claim evidence already assembled

The assessor completes a structured decision form. Charlo drafts the determination letter and supporting assessment documentation. Your judgement, your decisions documented, referenced, and ready to issue.





Tertiary Education

Tertiary Education Academic and research staff carry administrative workloads that compete directly with the work they were hired to do, reference letters under deadline, compliant documentation for laboratory equipment, processes that demand accuracy but reward speed.

Charlo, your senior teammate, takes on the reading, extraction, and structured drafting so your people return their attention to research, teaching, and the work that drew them to academia in the first place.

Academic Reference Letter Assistant

From a stack of candidate documents to a polished, evidence-anchored reference letter without the hours of reading and restructuring.

Upload a candidate's CV, publications, and supporting material. Answer a short setup covering the letter's purpose, your relationship, preferred tone, and target length. Charlo reads the full record, extracts every verifiable fact, and produces a first cut academic reference letter in your voice.

- A fully formatted letter with writer letterhead, addressee block, salutation, reference line, and signature
- An opening paragraph that establishes your relationship, its duration, and the purpose of the letter
- Three to five body paragraphs densely anchored in the candidate's actual publications, grants, awards, teaching record, and service roles
- Tone and style matched to your choice from traditional comprehensive academic through to concise, modern, and impact-oriented
- Optional style-matching from your own previous letters, so the output reflects your natural phrasing and cadence
- TBC markers inserted wherever a detail is needed but not present in the source documents nothing fabricated

You bring the professional relationship and the personal observations. Charlo brings the reading, the fact extraction, and the evidence-threading so the finished letter carries your authority, not just your name.



Scientific Equipment SOP Assistant

From a manufacturer's user manual to a first cut draft SOP with safety, operations, calibration, maintenance, and troubleshooting structured and ready for review.

Upload the equipment's user manual, provide your site-specific details location, authorised users, safety rules, record-keeping requirements and Charlo extracts the technical content and produces a professionally formatted Standard Operating Procedure.

- Extracts every identified hazard, PPE requirement, emergency procedure, and prohibited action from the manual into a structured safety section, combined with your site-specific safety rules
- Converts startup, operation, shutdown, and cleaning sequences into numbered procedural steps with parameters, wait times, and verification points
- Maps calibration requirements frequency, parameters, acceptance criteria into a dedicated section, with reference to separate calibration SOPs where applicable
- Compiles user maintenance tasks and service maintenance schedules with frequencies, procedures, and responsible parties
- Builds troubleshooting tables covering common problems, causes, solutions, error codes, and escalation criteria
- Includes a one-page quick reference card for daily use, document control fields for formal approval, and revision history tracking

The manual provides the technical foundation. Your site information provides the organisational context. Your senior teammate produces the structured draft so your qualified personnel spend their time reviewing and approving, not writing from scratch.

