



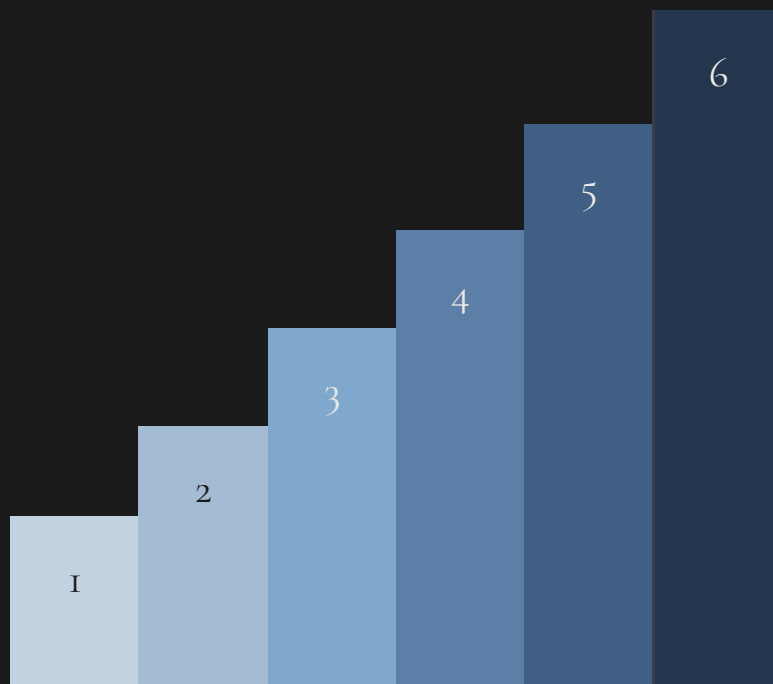
What we built at *Dunedin.*

The systems running inside a working sport horse
business, rung by rung.

A companion to The Growth Gap. Everything in these pages runs at Dunedin
Sports Horses today, and every system was built there before it was offered to
anyone else.

VERICTUS

ADVISORY · AUTOMATION · STRATEGY



01 / THE BUSINESS

A small team, a lot of admin, and too much of it in one person's head.

Dunedin Sports Horses is an eventing sport horse business, co-founded in 2016 by Katie Robertson and 5★ international event rider Hayley Frielick. It moved from Australia to the US in 2022, with European sourcing run from Ireland.

It is a handful of people and a small number of horses. Before the build, competition entries, insurance, invoicing, marketing and the website all ran on memory and evenings. The same problems most owners in the horse world will recognise.

What carried over from the institutions was the discipline, not the scale.

Katie Robertson, Chartered Accountant. Twenty years in institutional finance, formerly CFO and Chief Digital and Transformation Officer at a \$940bn asset manager.

02 / HOW IT WAS BUILT

Stop. Build the play. Train.

The same three steps Verictus now runs with every client, used at Dunedin first.

Stop

Do the role and watch how the work actually runs. Then record it: Katie filmed herself on Zoom doing each task and talking through every step, and Claude, using an SOP skill, wrote the procedure. Faster than writing, and nothing gets forgotten.

Build the play

Each procedure becomes a Claude skill that does the gathering, drafting and filing on the tools already in use: Gmail, Calendar, Drive, Notion, Slack, Xero, Excel and Word, EventEntries and the insurer's client portal. Nothing is paid, sent, bound or published without a person.

Train

Everything is written so someone new can pick it up: read the SOP, then set Claude off on the skill. Hayley, Martha and Katie each run the workflows that sit with them.

03 / THE MAP

Every rung of the Growth Ladder, built at Dunedin first.

The Growth Gap sets out six rungs, each solving a specific growth problem. This is what sits on each one at Dunedin.

6

Intelligence & Transformation

Over 50 active AI skills in one register, live dashboards, and the cost of each horse from day one.

5

Scale & Systems

One master record per horse. One instruction runs a whole sale close-out.

4

Demand Generation

Named first by ChatGPT and Perplexity on the question serious buyers ask.

3

Efficiency

Invoicing, buying, selling, entries, reimbursements and social planning, each run by AI employees built from the procedure.

2

Capture

Email, Facebook and Instagram messages triaged, with replies drafted in the owner's voice.

1

Credibility

A website rebuilt around the buyer's question, with press and results in one place.

None of it was built at once. Each rung was proven before the next was started, which is the sequence we recommend to every client.

I

RUNG 1 / CREDIBILITY

A website built around the buyer's question

- THE PROBLEM A site that described the business but did not answer the question a buyer actually asks: can I trust you to source a horse I have not sat on?
- WHAT WE BUILT A sourcing page and a buyer's guide that answer it directly, static pages search engines and AI can read, and a press section kept current from one instruction.
- HOW IT RUNS New press coverage becomes a press card on the site. A new horse for sale, or a sold one moved to the archive, is prepared from one instruction. A person checks and publishes.

2

RUNG 2 / CAPTURE

No enquiry waits for someone to be free

- THE PROBLEM Enquiries from owners, buyers, vets, suppliers and event secretaries arriving by email, Facebook and Instagram, read between rides.
- WHAT WE BUILT Triage across email and the connected Meta inboxes for Facebook and Instagram. Each message is sorted into reply, escalate or ignore, each reply is drafted in the owner's voice, and any fact it could not confirm is flagged. WhatsApp is next.
- HOW IT RUNS A scheduled agent runs through the day on a timetable the owner sets. The owner reads a scored report, edits the drafts and sends. Journalist requests get two drafted replies to choose from.

Drafts wait for a person. Nothing leaves the business without someone pressing send.

THE PATTERN UNDERNEATH

Be readable, then be reachable.

Rungs 1 and 2 keep the demand a business has already paid for: the results, the reputation, the years of showing up. A buyer who finds a clear answer and gets a reply the same day is a buyer who stays.



RUNG 3 / EFFICIENCY

The recurring admin, each run by an AI employee

Each workflow was recorded once and turned into an SOP. The bigger ones, buying and selling a horse, run from one SOP across several Claude skills. Growth adds work. At Dunedin it lands on systems, and a person keeps the decision.

WORKFLOW	WHAT THE SYSTEM DOES	WHERE A PERSON DECIDES
Boarding and owner invoicing	Builds the monthly boarding and owner invoices and posts them straight into the accounting software	A check before invoices go
Buying a horse	Takes the passport copy, the buyer's photos and the description, creates the horse record, feeds the insurance application and loads the for-sale listing on the website	Binding cover and publishing
Selling a horse	Bill of sale, invoicing, drafting the insurance cancellation, and moving the horse from "for sale" to "placed" once the funds have cleared	Confirming the sale and funds
Competition entries	Enters and verifies the entry, completes FEI steps and forms, files the waivers, drafts team comms	Payment and signing
Rider reimbursement	Builds the monthly form and packet, updates the tracker, files it	A check before it goes
Social media	Builds the annual, monthly and weekly content calendar and proposes each day's post	Pressing post

THE PATTERN UNDERNEATH

Any recurring process with more than one step.

Buying and selling a horse are horse-world examples. The same build handles new customer onboarding, order-to-invoice, supplier setup, licence renewals or warranty claims. Record the procedure once, turn it into a skill, then let the system do the admin.

4

RUNG 4 / DEMAND GENERATION

Named first by AI search, in under three weeks

Buyers now ask ChatGPT, Claude and Perplexity who to buy from. We picked the one question a serious buyer asks, rather than the broad search term, rebuilt the site around it, and worked the list of pages AI reads.

0 / 6

2 August
baseline

1 / 6

4 August

Named first

20 August
both engines

5 / 6

1 September

Mentions across three buyer questions on two AI engines, checked with the same prompts each time.

● THE RESULT

Both engines name Dunedin first on the European sourcing question, cited to Dunedin's own website rather than a directory or social profile.

● THE HONEST LIMIT

On the broad "eventing horse for sale" search Dunedin is cited but not yet recommended. That is the next climb.

Marketing on a system, not memory

a

The owner's voice

A voice profile drafts posts, newsletters and captions, then checks itself before anything reaches a person.

b

One recording, many pieces

A meeting or a ten-minute brain-dump becomes a blog post with its search package, social posts and hooks.

c

Owner updates

Each horse's quarterly results become an owner newsletter and results table, ready for design.

d

Competitor watch

What rivals post and what earns engagement, pulled into content ideas.

e

One brand, everywhere

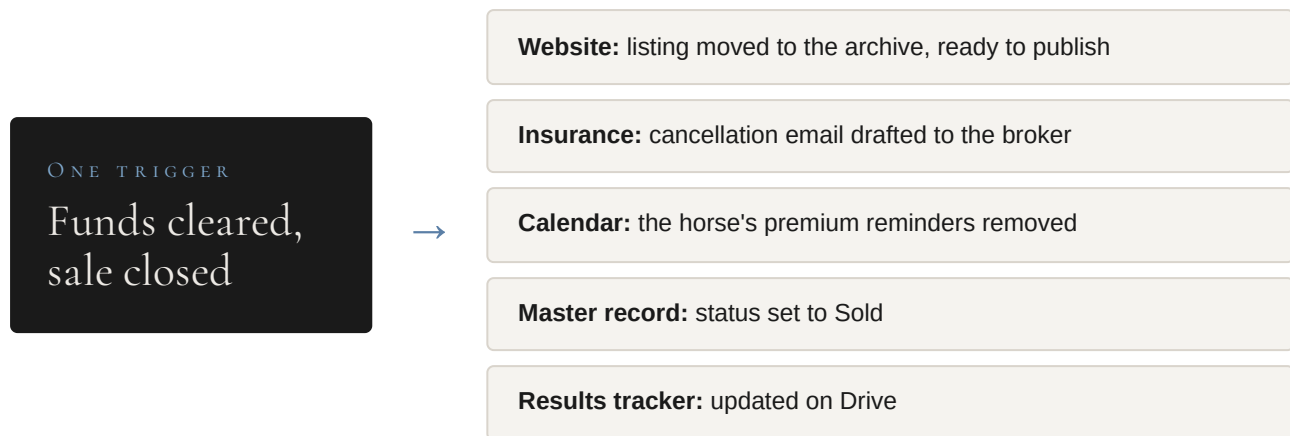
Social posts, the website, owner newsletters, invoices, bills of sale and client agreements all run through Claude Design, which holds the logo, colours, type and voice. Every piece looks and sounds the same without anyone checking it. Keeping that consistent used to take hours.

5

RUNG 5 / SCALE & SYSTEMS

"The horse is sold." Then nothing is left to memory.

One master record per horse covers vetting, insurance and competition entries. The bill of sale app links to it. Katie agreed the contract with legal counsel, the team built it in-house as an app connected to e-signing, and whoever is selling picks the horse, adds two or three details, and the contract goes out for signature. When a sale closes, one confirmed instruction runs five workstreams.



The pattern a client buys: one business event turned into every downstream task. For a supplier it is "order shipped"; for a yard it is "client leaves".

6

RUNG 6 / INTELLIGENCE & TRANSFORMATION

What runs, and what would break

● THE REGISTER	Over 50 active AI skills and scheduled tasks logged in one place, each with its status: active, fragile, under review or parked. Fragile means it runs but still depends on the founder, which makes it the next thing to fix.
● THE LEARNING LOOP	When the AI gets something wrong, the fix is logged and written back into the SOP, so the same mistake does not happen twice.
● THE NUMBERS	Live financial and marketing dashboards that refresh themselves each month, and the cost of each horse from the day we first see it, so decisions start from current figures.
● IN BUILD	A vetting and X-ray review app for our buyer in Ireland, so each vetting's findings and images are read and compared in one place and buying decisions move faster.

04 / RUNNING IN THE BACKGROUND

What runs without anyone asking.

Scheduled tasks do the recurring work on a timetable. Each one prepares, refreshes or drafts, and a person decides what goes out.

WHEN	WHAT RUNS
Every morning	The daily brief: reminders, calendar and actions for the day, on one page.
Through the day	Inbox triage across three inboxes and media requests, with every reply drafted. The podcast desk runs guest bookings, the diary and follow-up emails.
Twice a week	Calendars across three businesses checked and aligned, so nothing is double-booked.
Every Sunday	The weekly brief for the week ahead.
Start of the month	The financial dashboard and the marketing dashboard refresh, along with the search visibility tracker that shows whether Google and the AI engines are finding us.
Mid-month	The rider reimbursement packet is built and filed, ready for a check.

THE PATTERN UNDERNEATH

The owner reads. The system prepares.

Briefs, dashboards and drafts arrive already done, as live pages that open on a phone. The owner's time goes on the decisions only they can make.

Built for a horse business first. Fitted to yours.

Everything in these pages was built for a business of a handful of people. We build the same systems for yours, around the tools you already use, starting with the one gap that is costing you most.

FREE / NO OBLIGATION

The Game Tape call

A short first call with Katie Robertson. We look at:

- ◆ Where your business sits on the Growth Ladder today
- ◆ Which of the systems in these pages would matter most to you
- ◆ What a realistic first step would look like
- ◆ Whether or not that involves working with us

1

Game Tape

Free first call

2

Stop

Map how the work runs

3

Build the play

Build what matters first

4

Train

Your team runs it

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