



POLYMATH REVOPS WIZARD™

STOP GUESSING WHAT YOU'RE OVERPAYING FOR. PROVE IT.

THE PROSPECTIVE CUSTOMER OVERVIEW & OPPORTUNITY REPORT

*The Case, the Comparisons, the Real Report, and the Real Numbers Behind
Polymath RevOps Wizard*

**A live, sourced, ranked audit of what you're already paying for — delivered in
minutes, not days, for less than the cost of the waste it typically finds.**

Prepared by

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September 17, 2026

Volume 2 of 4 • Customer Overview Edition

Prepared for Prospective Customers & Partners

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This is Volume 2 of a four-volume Polymath RevOps Wizard document set. Volume 1 is the restricted owner's operations and technical manual; Volume 3 adapts this same overview specifically for accounting, bookkeeping, and tax-preparation firms; Volume 4 is the full vision and investor report.

The financial projections, revenue models, market-size estimates, and savings figures presented throughout this document are illustrative planning estimates only and are not guarantees of future results. Nothing in this document constitutes legal, financial, tax, or investment advice; readers should consult their own qualified professionals before acting on any information contained here.

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PART 1

The Case for Polymath

The elevator summary, why a free AI prompt falls short, and real proof from a real client

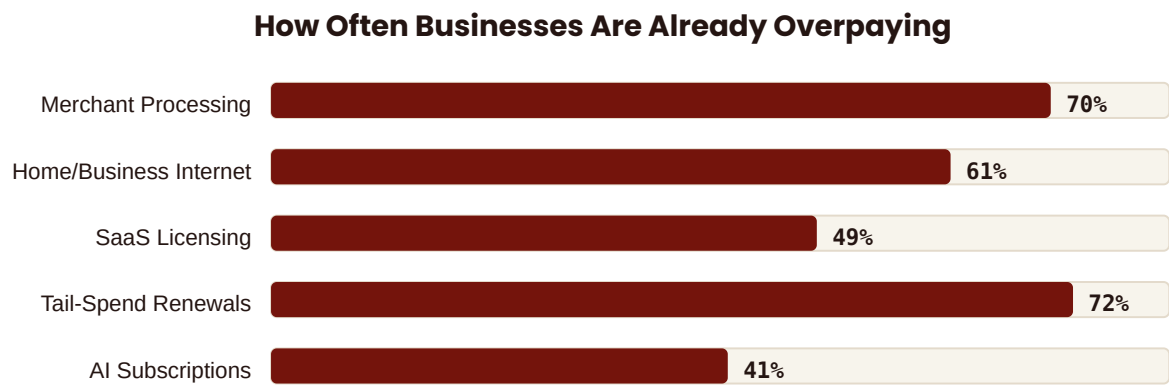
The One-Minute Case

“For less than the cost of a client lunch, I find out whether you’re one of the businesses already losing money on your current software, merchant fees, or subscriptions — and if you are, you’ll know exactly how much, with sources, in writing.”

Polymath RevOps Wizard™ is a research and auditing engine, with an optional ongoing-monitoring upgrade. Tell it what you currently pay for — your CRM, your ecommerce platform, your marketing and SMS tools — and it runs a live web-search-backed research pass, ranks exactly three real, currently-marketed alternatives against a fixed evaluation rubric, cites every claim with a verified-as-of date, and hands you a polished, branded report you can act on immediately. It doesn’t stop there: an optional Guardian Watch subscription keeps checking after the report is delivered and alerts you the moment something changes.

Why This Is Not a Close Decision

- A single audit typically uncovers savings measured in the thousands of dollars, against an audit fee measured in the tens to low hundreds.
- It pays for itself on the very first finding — not eventually, immediately.
- It’s a deductible business expense, the same as any other professional service or software subscription.
- This is not a speculative investment — it’s a bounded-cost check against a well-documented, statistically likely recovery.



Sources: Nilson Report/industry merchant-fee surveys; industry broadband pricing trackers; Zylo/BetterCloud 2026 State of SaaSOps; Vertice 2026; CostLoop 2026.

The Honest Value Proposition

I built Polymath to answer one question fast, cheaply, and defensibly: is money already being wasted here, and if so, exactly how much? The audit fee, whatever tier fits, is trivial next to the number it's built to find — and every dollar of that recovery compounds the moment an ongoing Guardian Watch subscription is added on top.

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Where This Started

Polymath did not begin as a piece of software. It began as one real, billable engagement: a systems audit of HubSpot, Klaviyo, and Shopify, scoped and delivered for 7 Fathoms Seaweed Skin Care — comparing the platforms actually in play across its two business lines, for a typical four-day audit consult fee. That engagement produced a real finding, by hand, in a single sitting: a documented recurring-savings opportunity.

The insight that followed was simple: the process behind that one audit — compare current platforms against live market alternatives, score them on a fixed rubric, cite sources, write it up professionally — was exactly the kind of structured, repeatable research task a purpose-built engine could run in minutes instead of hours. I built Polymath RevOps Wizard to productize that process, not to replace the judgment behind it.

What Makes Polymath Different, Point by Point

- 1 **Fixed evaluation rubric:** exactly three ranked candidates, every time, against the same criteria.
- 2 **Cited, timestamped evidence:** every claim traces to a live source with a verified-as-of date.
- 3 **Scheduled monitoring available, not just a snapshot:** on the optional Guardian Watch subscription, the engine keeps watching after the report is delivered — a one-time audit alone does not include this.
- 4 **A compounding proprietary dataset:** every audit contributes to a growing benchmark unique to Polymath.
- 5 **Category-agnostic architecture:** the same engine underlies every Guardian Network satellite product.
- 6 **Near-zero marginal operating cost:** which is what lets pricing stay aggressive without sacrificing margin.
- 7 **Built-in referral distribution:** a referral or white-label layer native to the design, not bolted on afterward.

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Why This Beats a Free AI Prompt

You can already open ChatGPT or Claude and ask “what’s a good CRM for a 10-person business?” The answer you get is not a substitute for what Polymath delivers, and the gap is worth stating plainly:

What Matters	A Free AI Prompt	Polymath RevOps Wizard
Source citations	Rarely cited; claims presented as fact from training data, which may be stale or fabricated	Every claim cited to a live source with a verified-as-of date
Consistency	No fixed rubric — different candidates and reasoning on repeated asks	Fixed 3-candidate evaluation rubric applied identically every time
Ongoing monitoring	A single snapshot answer at the moment asked — not a service	Available on the optional Guardian Watch subscription: scheduled monitoring with automatic change alerts — not included with a one-time audit
Accountability / audit trail	No record of what was checked, when, or against what sources	Timestamped, sourced, retained report — a real audit trail
Deliverable format	Raw chat text you have to reformat yourself	Branded, professional, client- or board-ready report
Accuracy risk	Known to hallucinate pricing, features, and vendor details with full confidence	Grounded in live search results, not generated from memory

The Real Cost of “Free”

A free AI prompt still has a real cost — it is simply paid later. A hallucinated vendor name or a stale price adopted in good faith can cost far more than an audit fee the moment a purchasing decision is made on it; an uncited claim can't be defended if anyone pushes back; and a one-time chat answer, by design, cannot warn you when the market shifts six months later. A one-time audit's fee buys exactly what a free prompt cannot supply: a citation trail and a repeatable rubric — and, if you add the separate, optional Guardian Watch subscription on top, a service that keeps watching after the report is delivered.

What's Actually Behind It

Polymath is built on Claude, Anthropic's AI model — and I say that plainly rather than hide it. What makes it a product instead of a lucky guess is the orchestration wrapped around that model: the fixed rubric, the citation discipline, the Guardian Watch monitoring schedule for clients who add it, and a benchmark dataset that grows with every audit. A more capable underlying model makes Polymath's output better; it does not, on its own, give a raw chat session a rubric, a source trail, or a reason to check back next month. That orchestration is what you're actually paying for.

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Real Proof: The 7 Fathoms Story

Every claim in this report traces back to one real, paid, four-day systems audit — not a hypothetical.

The founding engagement behind Polymath was a real systems audit for 7 Fathoms Seaweed Skin Care, comparing the CRM, ecommerce, and marketing/SMS platforms actually running across its two business lines — a Canada-based Shopify direct-to-consumer storefront and a separate U.S. wholesale account-acquisition operation.

THEIR CURRENT ESTIMATED SPEND

\$880/mo (~\$10,560/yr)

RANK #1 — MONEY SAVED SWITCHING

\$5,712/yr

54% less than their current stack

RANK #2 — MONEY SAVED SWITCHING

\$5,520/yr

52% less than their current stack

RANK #3 — MONEY SAVED SWITCHING

\$1,032/yr

10% less than their current stack

The top-ranked alternative alone represented more than half of 7 Fathoms' current annual platform spend recovered — identified automatically, in one sitting, at the entry Savings Snapshot tier. This is the same process, running on the same engine, that generates every Polymath report.

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PART 2

What You Actually Get

A real look at the report, and why it's built for anyone to use

What the Audit Report Looks Like

A visual walkthrough of the actual Savings Snapshot report layout, using the real 7 Fathoms output as the worked example, exactly as delivered — scroll through it the way a customer would.

● ● ● polymath-report.pdf — page 1

SMITH BIZ TEST RUN • 3536 POCAHONTAS DRIVE • (904) 599-3502 • MAILTODREW@GMAIL.COM

Savings Snapshot

Prepared for: 7 Fathoms Seaweed Skin Care
Prepared by: Smith Biz Test Run
Date: September 15, 2026

“We evaluated three ranked platform alternatives to 7 Fathoms Seaweed Skin Care’s current CRM, ecommerce, and marketing/SMS stack. Below is the estimated annual savings each ranked option represents.”

Page 1 of the real report — branded header and client line.

YOUR CURRENT ESTIMATED SPEND

\$880/mo (~\$10,560/yr)

RANK #1 — MONEY SAVED SWITCHING

\$5,712/yr

54% less than your current stack

RANK #2 — MONEY SAVED SWITCHING

\$5,520/yr

52% less than your current stack

RANK #3 — MONEY SAVED SWITCHING

\$1,032/yr

10% less than your current stack

Upgrade to See the Full Picture. This Savings Snapshot shows the SIZE of the opportunity — upgrading to the Full Audit Report unlocks the actual platform names, pricing, scoring, a compliance & risk review, cited sources, and a step-by-step implementation plan.

This is the actual billboard, in the actual colors, that every customer scrolls to within seconds of opening their report.

This is what you're actually buying: not a chat transcript, not a spreadsheet you have to build yourself — a finished, branded document that states the size of your opportunity before a single vendor name is even shown.

What You Actually Get When You Upgrade — the Full Audit Report

The three pages above are the Savings Snapshot — deliberately the smallest possible sample, built to answer one question (is there a finding worth paying for) as fast as possible, with no vendor names shown. A Single Audit or any tier above it delivers the complete report the engine actually produces: a real, 19-page document. What follows is a full page-by-page walkthrough of that complete report, illustrated using the actual, real Full Audit Report

delivered to 7 Fathoms Seaweed Skin Care — the same worked example, taken all the way through.

- **Named, real vendors — not categories.** The Savings Snapshot never says which platforms to switch to. The full report names every current and recommended platform outright, with real published prices.
- **Two full current-cost scenarios, priced to the line.** Not one estimate — a lower-tier and a higher-tier reading of your actual spend, each broken into every component with its own monthly price, one-time onboarding cost, and exactly what it covers.
- **Every alternative independently rated, not just ranked by Polymath.** Each recommended platform carries a third-party rating (e.g., G2) alongside its own price and what it replaces — evidence you can verify yourself, not just our word for it.
- **A specific, written recommendation with reasoning — not just a ranking.** The report names one platform as the pick and explains why in plain language, then explains the runner-ups too, naming the specific situation where each one might actually be the better choice for you instead.
- **A stepped implementation plan with a named owner for every step.** From first vendor contact through parallel running to final cutover — you never have to guess what happens after you buy the report.
- **Business-specific risk and fit notes.** Considerations a generic platform comparison would miss entirely — compliance exposure, workflow depth, integration gaps — specific to how your business actually operates.
- **A full comparison appendix, one page per candidate.** Every ranked alternative gets its own complete side-by-side table against both current-cost scenarios, closing with the exact dollar and percentage savings.
- **Sourced and dated, throughout.** Pricing and ratings are stated as current to a specific date and flagged to be re-verified before acting — an audit trail, not a guess.

Page by Page: The Full 19-Page Report

Page	Section	What's There
1	Cover & Engagement Framing	Consultant letterhead and contact info; client name, title, and date; the report's title and the specific yes/no question it was commissioned to answer; a short paragraph naming exactly what's evaluated and how the report concludes.
2	The Headline Number	The single most important figure, stated first, in large type — here, a 97% maximum potential spend reduction — plus a “Purpose of this report” section framing the real question as cost-fit, not platform quality.
3	Business Context	The client's actual operating structure, in its own terms — here, two distinct commercial lines with different platform needs — and why that structure shapes everything that follows.
4	Platform Landscape at a Glance	A full side-by-side capability table across every current platform (CRM, quoting, email, SMS, integration depth, billing basis), plus a callout naming hidden billing traps specific to those named vendors.
5	What Each Platform Actually Does	Plain-language definitions distinguishing a CRM's job from a marketing platform's job, exactly where the current pairing's integration gap lives, and a labeled diagram of the client's current, disconnected stack.
6	The Recommended Architecture	A second diagram showing the unified alternative, and the written case for why one platform doing both jobs is the more efficient design at this client's actual scale.
7	Current Stack, Priced Out — Scenario A	A full line-item pricing table for the first current-cost reading: monthly price, one-time onboarding fee, and exactly what each line covers.
8	Scenario B, Then the Alternatives Begin	The second, higher-tier current-cost scenario, followed by the start of the ranked lower-cost alternatives table — real price, what it replaces, and an independently sourced rating for each.
9	Alternatives (concluded) & the Gap in Plain Numbers	The remaining ranked alternatives, then a callout translating the entire comparison into one plain-language savings range, closing with a written Summary.
10	Conclusion and Recommendation	A named, specific recommendation with full written rationale — plus the runner-up picks and the exact situation where each one might actually be the better choice instead.
11	Next Step, Then Implementation Begins	A table of exactly what to ask shortlisted vendors before committing and why each ask matters, followed by the opening steps of the numbered implementation plan.
12	Implementation (continued)	The rollout plan's middle steps: exporting current data, starting a trial, rebuilding automations, and running the new platform in parallel against live results.

Page	Section	What's There
13	Implementation (concluded) & Additional Considerations	The final rollout steps — cutover, decommission, training — with a callout confirming nothing is cancelled early, followed by business-specific risk and fit notes a generic comparison would miss.
14	Appendix A — Introduction	A short explainer of what the appendix contains and how to read it, plus every sourcing and estimation disclaimer in the report gathered in one place.
15	Appendix A — Rank 1 Full Comparison	A complete one-page table for the top-ranked alternative: both current-cost scenarios repeated next to its own price and features, closing with exact dollar and percentage savings.
16	Appendix A — Rank 2 Full Comparison	The same full comparison format, one page, for the second-ranked alternative.
17	Appendix A — Rank 3 Full Comparison	The same full comparison format, one page, for the third-ranked alternative.
18	Appendix A — Rank 4 Full Comparison	The same full comparison format, one page, for the fourth-ranked (or hybrid) alternative.
19	Closing, Signature & Disclaimers	A closing statement, the consultant's signature block, and a final restatement of what's estimated versus confirmed — and as of what date.

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Built for Anyone to Use

No technical knowledge required, at any step.

Directions for Use

- 1 Have your current provider's billing statement or plan-tier page on hand — that's the only preparation needed.
- 2 Fill out a short, plain-language intake form: a handful of questions about your current provider and rough usage (seats, volume, monthly spend). No account credentials, no integration, no technical terms.
- 3 Receive your finished Savings Snapshot in one sitting — typically minutes, not days.

Why This Matters

A first-time, non-technical small-business owner can complete the intake and receive a finished report with no learning curve. There is nothing to install, nothing to configure, and nothing that requires a developer or an IT department to use.

Reading Your Report

- Start with the billboard — the one-glance version of the whole finding.
- Check the “verified as of” date on every cited price before acting on it — pricing pages change without notice, which is exactly why the citation exists.
- Treat the ranked alternatives as a starting shortlist for your own due diligence, not a purchase order.

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PART 3

Programs, Pricing & the Guardian Network

What it costs, what keeps watching after the report, and how to get paid for a referral

Pricing & Tiers

The Current Pricing Ladder

Confirmed directly against the live Lemon Squeezy product dashboard, September 16, 2026.

SAVINGS SNAPSHOT

\$35

one-time · no
vendor names, a
taste of the finding

SINGLE AUDIT

\$150

one-time · one full
audit, named
vendors, pricing &
scoring

10-AUDIT PACK

\$750

one-time, \$75/audit
· several parts of the
business, or several
clients

UNLIMITED 3-MONTH
PASS

\$400

one-time,
timeboxed · a fixed
window of unlimited
audits

UNLIMITED 6-MONTH PASS

\$600

one-time, time-boxed · a longer fixed window

UNLIMITED MONTHLY

\$149/mo

recurring · an ongoing standing audit service

What You're Actually Comparing Against. A manual version of a single audit takes an estimated 4–8 hours of a consultant's time. At even \$100/hour, that is \$400–\$800 of billable time for a report that costs as little as \$35–\$150 to buy outright. Framed either way — against the documented savings it finds, or against the labor it replaces — the fee is trivial next to the number it is designed to find.

Guardian Network Monitoring (per engine)

Tier	Price
Guardian Watch	\$49/month per engine
Guardian Watch + Priority Re-Audit	\$99/month per engine
Guardian Network Bundle (all engines)	\$299/month

Buy-Trigger Note

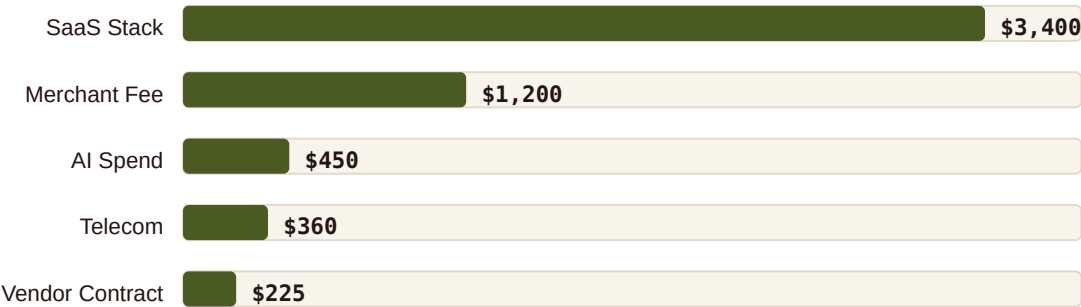
The entry Savings Snapshot exists to remove the only real objection to a first purchase — uncertainty about whether there's anything to find. Once you see even a rough teaser number, the full audit becomes a formality, not a decision.

The Guardian Network: Always Watching

A single audit finds waste once. A Guardian Watch subscription keeps finding it — a family of always-on monitoring engines, each watching one category of recurring business spend.

Engine	What It Watches	Documented Waste Rate
SaaS Stack Guardian	Project management, communications, cloud storage, HR/payroll tools	49% of licenses unused
AI Spend Guardian	AI tool subscriptions, redundant model-tier purchases	41% waste rate
Merchant Fee Guardian	Payment-processing effective rate vs. market	~70% overpay
Telecom Guardian	Business phone, internet, and mobile plans	61% overpay
Cloud Cost Guardian	AWS/Azure/GCP spend, oversized instances	~35% waste rate
Insurance Comparison Guardian	P&C, general liability, workers'-comp coverage vs. market (informational only)	~30% waste rate
Vendor Contract Guardian	Utility, waste/recycling, and security-monitoring contracts	72%+ of tail-spend renewals unreviewed

Conservative Annual Client Savings by Engine (at scale)



Conservative per-client estimates; see Volume 4 for full methodology.

A Warranty, Not Just a Health Check

A one-time audit tells you the truth on the day it runs. A Guardian Watch subscription keeps that truth current — the difference between a single health check and an ongoing warranty against vendor drift, price creep, and contracts that renew themselves when nobody's looking.

The Affiliate & Referral Program

Open to anyone — a happy customer, a consultant, a friend of the business, or a complete stranger who just likes the product.

The Offer
Refer a customer to Polymath RevOps Wizard, earn 20% of everything they ever pay — for as long as they stay a customer. No quarterly cutoff, no paperwork, no waiting on a payout.

Product	Price	You Earn (20%)
Savings Snapshot	\$35 one-time	\$7.00 per referral
Single Audit	\$150 one-time	\$30.00 per referral
10-Audit Pack	\$750 one-time	\$150.00 per referral
Unlimited 3-Month Pass	\$400 one-time	\$80.00 per referral
Unlimited 6-Month Pass	\$600 one-time	\$120.00 per referral
Unlimited Monthly	\$149/month	\$29.80/month, for as long as the customer stays subscribed

Sign up for free, share your personal referral link, and Lemon Squeezy tracks and pays automatically, twice a month, straight to a bank account or PayPal — zero delivery work required beyond the introduction.

Why 20%, Forever
A capped, higher-percentage structure was considered and ruled out once Lemon Squeezy's payout engine turned out not to support a hard cutoff. Rather than fight the platform, the program leans into what it's good at: a flat rate with no expiration is simpler to explain, impossible to miscalculate, and rewards affiliates who bring in long-term subscribers even more than a front-loaded bonus would.

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Who This Is For

Your Business	Why Polymath Fits
Professional services (law, accounting, consulting)	High hourly value makes even small administrative waste expensive; unaudited software spend sitting idle is hard to justify.
Ecommerce / DTC brands	Heavy CRM/marketing/ecommerce stack — Polymath's original and best-proven category, with the clearest track record.
Healthcare & dental practices	High vendor count (EHR, scheduling, billing) plus real compliance exposure.
Restaurants & hospitality	Thin margins make POS, merchant-fee, and telecom overpayment disproportionately painful.
Real estate brokerages & agents	Lead-generation subscriptions are notorious for auto-renewal and overlapping tools.
Local trades & contractors	Less time to audit your own tech stack, and higher baseline waste in utility, vendor, and merchant contracts.
Nonprofits	An independent audit is a trust signal to your board, as much as a savings tool.
Early-stage SaaS / tech startups	Fastest AI tool adoption of any segment, with the least governance.

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PART 4

Getting Started

How to run the first audit

How to Get Your First Audit

- 1 Have your current platform's billing statement or plan-tier page on hand.
- 2 Choose a tier — the \$35 Savings Snapshot is the lowest-friction way to see whether there's a finding worth acting on.
- 3 Fill out the short, plain-language intake form.
- 4 Receive your branded report, typically within minutes.

The Bottom Line

Run your first audit for less than the cost of a client lunch. If there's nothing to find, you've lost very little finding that out. If there is — and the documented base rates in Chapter 1 say the odds favor that outcome — you'll know exactly how much, with sources, in writing.

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PART 5

Legal & Privacy Reference

What governs your use of the Service, and how your information is handled

Terms of Service & Privacy Policy

Reproduced here in full so you can review exactly what governs your use of the Service before you buy.

Terms of Service — Polymath RevOps Wizard™

Effective date: September 17, 2026

These Terms of Service (“Terms”) govern your use of Polymath RevOps Wizard™ and the Guardian Network (the “Service”), operated by the business named on this document's cover page. By purchasing or using the Service, you agree to these Terms.

DESCRIPTION OF SERVICE

Polymath RevOps Wizard researches your current CRM, ecommerce, and marketing/SMS platforms, compares them against current market alternatives, and produces a ranked comparison report with cost and recommendation information, based on the details you provide and current publicly available vendor pricing at the time your report is generated. The Service also offers Guardian Network monitoring subscriptions (“Guardian Watch” and related tiers) across additional recurring-spend categories, which re-check a category on a recurring, ongoing basis and alert you the moment something changes, for as long as your subscription remains active.

NOT PROFESSIONAL ADVICE

Reports and alerts produced by the Service are informational and educational in nature. They are not financial, legal, tax, insurance, or professional consulting advice, and should not be relied upon as a substitute for your own independent professional judgment before making a purchasing, coverage, or vendor decision.

PAYMENT & REFUNDS

Payment is processed through Lemon Squeezy at the time of purchase. Because generating a report consumes real research and computing resources at the moment it is created, one-time purchases are non-refundable once a report has been generated and delivered. Guardian Watch and other recurring monitoring subscriptions may be cancelled at any time; cancellation takes effect at the end of the current paid billing period, with no partial-period refund for a mid-cycle cancellation.

ACCEPTABLE USE

You agree to use the Service only for lawful purposes, to provide accurate information when submitting a request, and not to attempt to disrupt, reverse-engineer, or resell access to the Service without authorization.

INTELLECTUAL PROPERTY

The Service, its software, design, and underlying methodology remain proprietary. A report generated for you is yours to use for your own business purposes; you may not resell or redistribute the underlying tool itself without a separate agreement.

DISCLAIMER OF WARRANTIES & LIMITATION OF LIABILITY

The Service is provided “as is” and “as available.” Reasonable efforts are made to ensure the accuracy of vendor pricing and comparisons at the time a report or alert is generated, but pricing and features published by third-party vendors change frequently and without notice. To the fullest extent permitted by law, the Service is not liable for any indirect, incidental, or consequential damages arising from your use of the Service or reliance on a report or alert it produces.

GOVERNING LAW

These Terms are governed by the laws of the Province of Newfoundland and Labrador, Canada, without regard to conflict-of-law principles.

Privacy Policy — Polymath RevOps Wizard™

Effective date: September 17, 2026

Polymath RevOps Wizard™ and the Guardian Network (“the Service,” “we,” “us”) explains what information we collect when you use the Service, how we use it, and your rights regarding that information.

INFORMATION WE COLLECT

When you generate an audit report, we collect the information you submit through the form, which may include: your name and email address, your company or business name, and details about your current CRM, ecommerce, and marketing/SMS platforms and pricing tiers. We do not knowingly collect government ID numbers, payment card numbers, or other sensitive identifiers directly — payment is handled entirely by our payment processor, Lemon Squeezy.

HOW WE USE YOUR INFORMATION

We use the information you submit to generate your audit report or run a Guardian Watch monitoring check, to send you the completed report and related alerts and communications,

to process payment through our payment processor, and to improve the Service's accuracy and reliability over time. If you were referred by an affiliate or referral partner (Chapter 9), Lemon Squeezy's Affiliates feature records that referral relationship for commission-calculation purposes only; it does not receive the content of your report. We do not sell your information to third parties.

THIRD-PARTY SERVICES

To generate your report or run a monitoring check, the details you submit are sent to Anthropic's Claude API, which performs live research and analysis to produce your results. Payment is processed by Lemon Squeezy, our merchant of record; Lemon Squeezy collects and processes your payment details directly — we do not see or store your full card information.

YOUR RIGHTS

You may request access to, correction of, or deletion of the personal information we hold about you by contacting us using the details on this document's cover page.

CHILDREN'S PRIVACY

Polymath RevOps Wizard is intended for business use by adults and is not directed at children. We do not knowingly collect information from children.

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