



folium

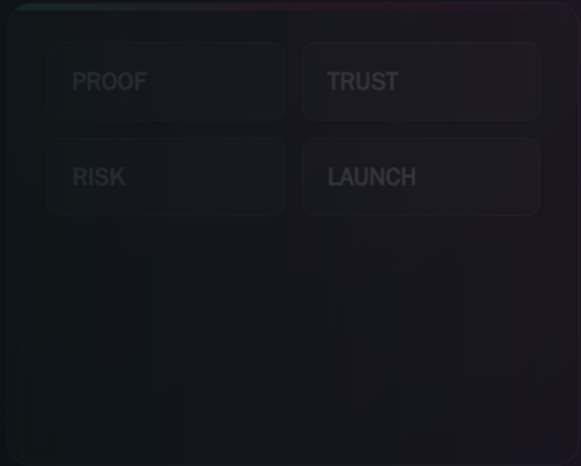
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REVIEW BEFORE PRODUCTION

FOLIUM SYSTEMS

AI DISCOVERY INTAKE AND HIDDEN-NEEDS MAPPING

AI Discovery Intake And Hidden-Needs Mapping



Many buyers cannot name the AI system they need yet. They can describe pressure: manual work, staff overload, disconnected tools, repeated questions, stale dashboards, risky handoffs, or customer friction. Folium can design the discovery intake layer that turns that pressure into a safe first AI lane, using structured questions, privacy-safe lead capture, prohibited-data warnings, analytics boundaries, hidden-needs mapping, role routing, and proposal-ready scoping records.

AUDIENCE

Owners, operators, founders, sales teams, marketing teams, intake owners, product teams, and service businesses that need a safer AI front door

PURPOSE

Show how Folium can build the buyer-facing and operator-facing discovery systems that identify the right AI opportunity before a build begins

UPDATED

May 2026

BOUNDARY

NEXT GATE

Folium can build AI discovery intake systems that ask better questions, avoid unsafe data capture, and route buyers toward the right first workflow.

Hidden-needs mapping turns vague AI interest into workflow, data, governance, adoption, integration, and launch-readiness signals.

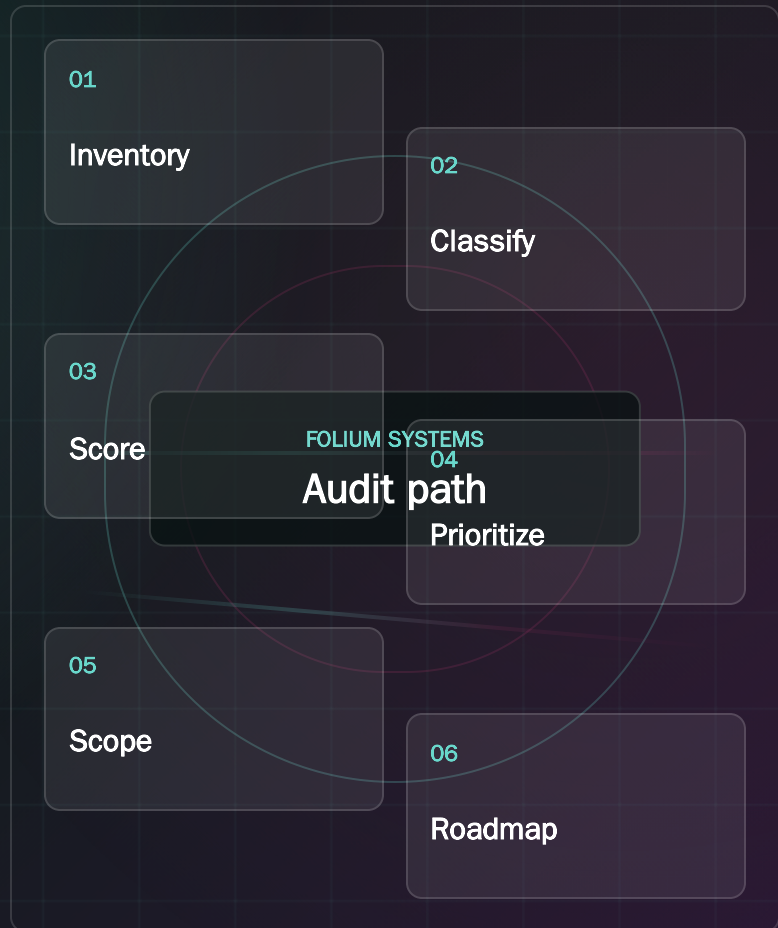
Privacy-safe lead capture, analytics boundaries, and prohibited-data rules are part of the operating system, not an afterthought.

AI SYSTEMS AUDIT

The audit finds the first safe lane before the buyer overbuilds.

The audit packet maps processes, systems, data, tools, subscriptions, staff impact, risk, runtime fit, and first-build candidates.

AUDIT PATH



01

Turns the audit into an operating product.

02

Shows the buyer what records they receive.

03

Connects discovery to a first build instead of a static report.

Choose the review route before reading cover to cover.

This packet is meant to support a real decision meeting. Different reviewers should enter through different routes, then come back together around the same controlled next step.

DECISION ROUTE

OPERATING ROUTE

TRUST ROUTE

EXECUTIVE ROUTE

Decision first

Start with the cover, visual summary, executive read, controls, first ninety days, and handoff. This route helps leaders decide whether the next move is education, audit, first build, pilot, or operations.

- Outcome
- Risk
- Owner
- Next gate

OPERATIONS ROUTE

How the work will run

Read the workflow map, procedures, operating roles, metrics, first sprint, and buyer worksheet. This route shows whether staff can actually use, review, and improve the future process.

- Workflow
- Staff
- Support
- Improve

TECHNICAL AND TRUST ROUTE

Where the boundaries live

Focus on records and work products, controls, risk assumptions, reference work products, source truth, runtime placement, and launch conditions before any private access expands.

- Source
- Access
- Runtime
- Rollback

BUYER SESSION ROUTE

Turn reading into a working session

Use the discovery questions, role review route, buyer worksheet, and engagement fit ladder to prepare one process, one owner, one source map, and one next decision.

- Process
- Examples
- Questions
- Decision

Best use: bring one workflow, the people who own it, the systems it touches, the data classes involved, and the decision this packet should help leadership make.

AI discovery intake and hidden-needs mapping in plain language.

Many buyers cannot name the AI system they need yet. They can describe pressure: manual work, staff overload, disconnected tools, repeated questions, stale dashboards, risky handoffs, or customer friction. Folium can design the discovery intake layer that turns that pressure into a safe first AI lane, using structured questions, privacy-safe lead capture, prohibited-data warnings, analytics boundaries, hidden-needs mapping, role routing, and proposal-ready scoping records.

RECORD

BOUNDARY

ACTION

QUESTIONS

The first form should think like a consultant

Discovery questions should uncover manual work, repeated decisions, tool sprawl, staff pressure, customer friction, data boundaries, and launch risk.

- Pressure
- Workflow
- Risk

SAFETY

Intake must block unsafe submissions

Contact forms and proof-room inputs should warn against credentials, payment data, regulated records, customer PII, secrets, logs, and confidential contracts.

- PII
- Secrets
- Boundary

SIGNALS

Analytics should learn without spying

Privacy-friendly analytics can measure route interest, proof review, download paths, and contact intent without prompt capture or cross-site identity stitching.

- Routes
- Proof
- Intent

MAPPING

Answers become a scoped first lane

The intake record can map to audit, proof sprint, workflow app, data boundary, AEO/GEO service, recovery path, or ongoing AI operations.

- Audit
- Build
- Operate

This packet is public-facing. It is written for serious review without exposing private infrastructure, customer data, credentials, live provider wiring, or internal project labels.

The operating path should be visible before anyone trusts the outcome.

Folium uses workflow maps to turn broad AI ambition into inspectable work. Each phase names the procedure, the visible output, and the decision gate that prevents excitement from outrunning control.

DECISION GRID

REVIEW LENS

NEXT STEP

PHASE	PROCEDURE	VISIBLE OUTPUT	DECISION GATE
Question map	Collect business pressure, workflow, systems, people, data, governance, adoption, integration, and launch-readiness questions.	Discovery question bank.	The buyer is asked about the real work.
Safe intake	Define allowed fields, prohibited data classes, warning text, spam protection, retention, access ownership, and confirmation behavior.	Privacy-safe intake contract.	Unsafe submissions are discouraged or blocked.
Hidden-needs analysis	Translate buyer answers into source truth, workflow, integration, staff, cost, risk, runtime, support, and proof needs.	Hidden-needs map.	The project is not reduced to a generic chatbot.
Routing logic	Map answers to AI systems audit, proof lab, workflow build, recovery, private AI, commerce, fintech-adjacent, website, backend, or AI search readiness paths.	Offer and route recommendation.	The next step is specific.
Measurement boundary	Track route interest, proof visits, download usage, role routing, and contact paths without capturing prompts, secrets, private tool inputs, or regulated content.	Privacy-friendly analytics plan.	The site learns safely.

The work should leave behind material a buyer can inspect.

A serious engagement should produce more than conversation. Folium packages records, diagrams, checklists, routes, system surfaces, launch gates, and handoff material so the buyer can keep control after the first win.

DECISION GRID

REVIEW LENS

NEXT STEP

WORK PRODUCT	WHAT IT CONTAINS	HOW THE REVIEWER USES IT
Discovery question bank	Opening, transition, adoption, workflow, data, integration, governance, commerce, local/private AI, compliance-quality, operations, and migration questions.	Uncovers what the buyer cannot name yet.
Privacy-safe intake contract	Allowed fields, blocked data classes, consent language, retention, deletion, access owners, logs, and error handling.	Protects buyers before the first call.
Hidden-needs map	Provenance, context, caching, hallucination guard, exception handling, evidence bundles, catalog, API workbench, health, FinOps, and model lifecycle needs.	Turns vague interest into capability design.
Offer routing matrix	Audit, transition office, proof lab, workflow app, website/web app, backend/API/database, recovery, private AI, AEO/GEO, and operations paths.	Creates a proposal-ready next step.
Analytics boundary record	What can be measured, what cannot be captured, provider choice, privacy review, cookie/no-cookie decision, retention, and access rules.	Lets the site improve without invasive tracking.

The procedure is the product as much as the technology.

The goal is not to make AI look impressive for one meeting. The goal is to make the operating path repeatable, explainable, reviewable, and safe enough to improve.

CHECKLIST

OWNER PATH

RELEASE SIGNAL

- Start with business pressure instead of asking the buyer to choose an AI product.
- Ask questions that expose workflow, data, tools, people, risk, support, and proof needs.
- Keep intake fields narrow and block private, regulated, secret, credential, customer, payment, log, and contract data.
- Use route-interest analytics only after privacy, retention, provider, access, and notice decisions are approved.
- Map answers to the safest next Folium path: audit, proof, build, recovery, local/private AI, AEO/GEO, or operations.
- Keep private customer data, credentials, contracts, private topology, private model names, and internal project labels out of public review material.
- Use explicit public-safe boundaries when work touches providers, money, regulated-adjacent review, customer-impacting actions, or live operating authority.
- Leave behind records that a buyer can inspect: source, scope, owner, date, evidence class, known limits, blocked states, and next-stage gate.

Governance, quality, and launch gates keep speed honest.

Folium keeps the buyer's next decision tied to observable gates: source truth, authority, access, testing, ownership, support, rollback, and improvement cadence.

DECISION GRID

REVIEW LENS

NEXT STEP

GATE	WHAT MUST BE TRUE	STOP OR REFINE SIGNAL
Question gate	The intake asks about real work, sources, tools, people, risks, and desired proof.	The form only asks for generic project description.
Data gate	Allowed and prohibited fields are explicit.	Buyers can paste secrets, PII, payment data, or regulated records.
Routing gate	Answers map to a specific next path with fit and not-fit logic.	Every inquiry receives the same generic pitch.
Analytics gate	Measurement excludes prompt capture, hidden form capture, retargeting pixels, and cross-site identity stitching unless approved.	The site learns by collecting too much.
Proposal gate	The output can become a scope, audit plan, proof sprint, or launch-readiness review.	Discovery ends as an unstructured conversation.

The right questions expose the real project.

These prompts help a buyer and Folium decide whether the next step should be education, audit, first build, security review, pilot, or an operating support path.

CHECKLIST

OWNER PATH

RELEASE SIGNAL

- What part of the business feels too manual right now?
- Where does the team copy, paste, re-enter, or re-check information?
- Which tools, files, dashboards, or emails are being manually connected?
- Which data should never be submitted through a public form?
- Which proof would make leadership comfortable with a first AI workflow?
- Which route fits the answer: audit, proof, build, recovery, website/web app, backend, private AI, AEO/GEO, or operations?
- Which proof can be public and which proof must stay private?
- Which owner can approve the next stage?
- What would make the workflow pause, rollback, or stay blocked?

Diagrams, charts, and overlays make the work easier to review.

Dense AI work should not only be explained in paragraphs. The reviewer should be able to inspect maps, scorecards, matrices, lanes, and before-after views that reveal where the value and risk live.

RECORD

BOUNDARY

ACTION

Discovery funnel

Business pressure, safe intake, hidden-needs map, route recommendation, proposal-ready scope.

- Pressure
- Intake
- Map
- Scope

Prohibited-data boundary

Customer PII, credentials, payment data, secrets, regulated records, logs, and confidential contracts are blocked from public intake.

- PII
- Secrets
- Logs
- Contracts

Offer routing map

Buyer answers route to audit, transition, proof, workflow build, local/private AI, recovery, AEO/GEO, or operations.

- Audit
- Proof
- Build
- Operate

Every serious AI path needs named owners before it becomes dependency.

The same technology can be safe or unsafe depending on who owns the workflow, data, quality, launch authority, support, and improvement loop. Folium makes those responsibilities explicit so no buyer inherits an orphaned system.

DECISION GRID

REVIEW LENS

NEXT STEP

ROLE	OWNS	RECORD TO INSPECT
Executive sponsor	Priority, budget, risk tolerance, stop/continue decision, and expansion timing.	Decision note, value hypothesis, and approval boundary.
Business process owner	The day-to-day work, acceptance criteria, staff impact, and operational usefulness.	Workflow map, user feedback, and adoption notes.
Technical owner	Systems, APIs, databases, runtime placement, deployment, monitoring, and fallback.	Architecture map, integration log, and support route.
Knowledge owner	Source truth, document freshness, policies, retrieval scope, and correction workflow.	Source inventory, freshness cadence, and review exceptions.
Security or risk reviewer	Data classes, credentials, access, logs, retention, blocked actions, and incident path.	Boundary map, permission table, and rollback trigger.
Folium delivery lead	Build coordination, review file, known limits, quality checks, and handoff completeness.	Launch room, eval record, and improvement backlog.

A max-detail packet should tell reviewers how to judge the work.

Folium uses scorecards to make a subjective AI conversation more inspectable. The score is not a substitute for judgment; it helps leadership see whether the next step is education, repair, sandbox, pilot, or operations.

DECISION GRID

REVIEW LENS

NEXT STEP

SCORE AREA	STRONG SIGNAL	WEAK SIGNAL
Business fit	The workflow is specific, painful, owned, and tied to measurable operational improvement.	The project is framed as adding AI generally.
Source truth	Approved sources are known, fresh, classified, and connected to the answer path.	The system mixes stale, unknown, or unapproved sources.
Behavior quality	Representative tasks pass, wrong-answer behavior is known, and edge cases are recorded.	The review build only shows a polished happy path.
Authority control	AI actions are separated into draft, retrieve, recommend, route, execute, block, and escalate.	The system can act without visible permission.
Staff readiness	Users can explain the tool, correct it, escalate, and understand their role.	Staff feel replaced, confused, or unsupported.
Operations readiness	Support, monitoring, rollback, release rhythm, and source refresh are owned.	No one knows who maintains the system after launch.

The work should have a believable first ninety days.

A controlled first ninety days keeps ambition high without turning uncertainty into production risk. Folium uses the period to move from understanding into a narrow working example, then into reviewable operating rhythm.

DECISION GRID

REVIEW LENS

NEXT STEP

WINDOW	FOCUS	EXPECTED OUTPUT
First 30 days	Discovery, source inventory, first-lane selection, staff interviews, data boundary, and build plan.	Process map, owner map, first-build scope, source list, and launch blockers.
Days 31-60	Working surface, RAG or agent behavior, integration stub, evaluation cases, browser checks, and staff review.	Sandbox, evaluation file, screenshots, known limits, and repair list.
Days 61-90	Architecture review, pilot conditions, governance layer, training guide, support path, and improvement cadence.	Launch room, go/no-go record, operations guide, and next-stage recommendation.

The hidden assumptions should be visible before they become expensive.

Every AI engagement contains assumptions about data, people, systems, cost, behavior, and authority. Folium treats those assumptions as review material, not background noise.

DECISION GRID

REVIEW LENS

NEXT STEP

ASSUMPTION	WHY IT MATTERS	HOW FOLIUM REVIEWS IT
The source is authoritative	AI can only be as reliable as the sources and business rules it is allowed to use.	Source inventory, owner confirmation, retrieval tests, freshness cadence.
The process is ready	A broken process can become a faster broken process when AI is added too early.	Workflow mapping, bottleneck review, owner interview, first-lane narrowing.
The runtime fits the data	Cloud, private, local, and hybrid routes carry different privacy, cost, latency, and support tradeoffs.	Runtime matrix, data classification, provider review, fallback plan.
Staff will adopt the tool	Adoption fails when users do not understand, trust, correct, or benefit from the system.	Training notes, staff review, feedback loop, manager visibility.
Authority is clear	The system can create harm if it sends, updates, approves, or routes without permission.	Permission table, blocked actions, human review, audit trail.
The system can be supported	A useful first build becomes fragile if nobody owns incidents, source updates, or cost review.	Support guide, owner map, release rhythm, rollback trigger.

The first sprint should produce something real and reviewable.

Folium prefers a narrow first sprint that creates a working surface or review file the buyer can challenge. The first sprint is not the final system; it is the safest way to make the future visible.

CHECKLIST

OWNER PATH

RELEASE SIGNAL

- Confirm the single process and the decision the sprint must support.
- Collect approved example material, redacted review records, public references, screenshots, workflow notes, and source rules.
- Define what will be built: portal, dashboard, RAG assistant, agent route, integration adapter, audit file, or launch room.
- Create the visual workflow: intake, source, model or agent route, human review, output, record, and next gate.
- Run representative tasks, edge cases, bad input, missing data, and blocked-action tests.
- Prepare browser screenshots, known limits, support questions, and next-stage blockers.
- Review with staff and leadership before expanding data, access, authority, or dependency.
- End with a decision: stop, refine, rebuild, pilot, or prepare an operating plan.

The packet should make the invisible work tangible.

AI work often fails because the important pieces are invisible until something breaks. Folium turns those pieces into work products the buyer can open, print, challenge, and improve.

RECORD

BOUNDARY

ACTION

Process map

A before-and-after workflow showing people, systems, data, decision points, blockers, and expected output.

- Before
- After
- Owner
- Gate

Data boundary map

A map of source classes, approved use, blocked use, retention, provider exposure, and custody.

- Public
- Internal
- Private
- Blocked

Model and agent route

A path showing which model, tool, retrieval source, or agent lane is used and where humans approve.

- Route
- Tool
- Review
- Escalate

Evaluation file

A record of tasks, expected outcomes, failures, repairs, known limits, and acceptance criteria.

- Cases
- Failures
- Repairs
- Limits

Launch room

A board for owners, support, training, rollback, incidents, go/no-go, and improvement backlog.

- Owner
- Support
- Rollback
- Backlog

Handoff guide

A plain-language guide staff can use to understand what the system does, cannot do, and how to report problems.

- Use
- Limit
- Correct
- Report

The business should know how improvement will be measured.

Folium keeps measurement practical. The first goal is not a perfect dashboard; it is a clear set of signals that shows whether the process is saving time, reducing risk, strengthening staff, or improving customer outcomes.

DECISION GRID

REVIEW LENS

NEXT STEP

SIGNAL	WHAT TO WATCH	DECISION IT SUPPORTS
Time recovered	Manual steps removed, average handling time, repeated work reduced, faster routing.	Should this workflow expand to more users or adjacent processes?
Quality improved	Wrong answers, missing sources, correction rate, review exceptions, customer rework.	Is behavior strong enough for pilot or does it need repair?
Risk reduced	Blocked unsafe actions, escalations, data-boundary violations avoided, rollback readiness.	Can authority expand or should controls remain tight?
Staff confidence	Training completion, feedback volume, adoption friction, override rate, manager notes.	Does the workforce need more support before launch?
Cost and runtime	Provider cost, local infrastructure cost, latency, uptime, fallback use, subscription sprawl.	Should runtime placement change?
Customer impact	Response speed, consistency, issue resolution, conversion support, satisfaction signals.	Is the capability improving the business outcome?

Each reviewer should know what to inspect first.

A max-detail packet is only useful when different reviewers can find their lane quickly. Folium separates executive, operations, technical, security, finance, and staff questions so the buyer can bring the right people into the right part of the review.

DECISION GRID

REVIEW LENS

NEXT STEP

REVIEWER	START WITH	DECISION THEY SUPPORT
Executive sponsor	Value hypothesis, launch gate, first ninety days, and stop/refine/continue choices.	Whether the process deserves a controlled engagement.
Operations lead	Workflow map, operating roles, support rhythm, and staff feedback loop.	Whether the future process can be run by the team.
Technical lead	Runtime placement, data path, integration surface, monitoring, and fallback.	Whether the architecture can be supported safely.
Security or risk reviewer	Data classes, permissions, blocked actions, logs, retention, and rollback.	Whether access can expand beyond public review.
Finance or owner	Cost signals, subscription overlap, runtime tradeoffs, labor impact, and support burden.	Whether the first build has a practical business case.
Staff user	Plain-language use, limits, escalation, correction path, and training expectations.	Whether the tool strengthens the job instead of confusing it.

The packet should turn into a working session, not only reading material.

Before a call, Folium wants the buyer to gather the real operating pieces that make the review useful. The worksheet keeps the conversation grounded in one process, one owner, one source map, and one next decision.

CHECKLIST

OWNER PATH

RELEASE SIGNAL

- Bring one workflow that is slow, risky, expensive, repetitive, customer-visible, or staff-heavy.
- Name the systems touched by the workflow: store, CRM, ERP, inbox, spreadsheet, database, portal, document folder, or legacy application.
- Separate approved public material from internal, customer, regulated, confidential, credential, and blocked material.
- Write down who owns the work today, who reviews exceptions, and who will own the AI-assisted version.
- List the decisions AI may draft, retrieve, recommend, route, block, or escalate, and the decisions that stay human-owned.
- Bring examples of good output, bad output, common exceptions, missing data, and customer-facing risk.
- Name the first useful working surface: dashboard, portal, assistant, queue, control room, commerce lane, integration, or review file.
- Decide what record would make leadership comfortable with the next stage.

The next step should match the maturity of the record.

Folium does not need every buyer to start at the same altitude. The right offer depends on how much process clarity, source truth, owner alignment, and launch readiness already exists.

DECISION GRID

REVIEW LENS

NEXT STEP

IF THE BUYER HAS	BEST NEXT FOLIUM MOVE	OUTPUT TO EXPECT
AI interest but no clear process	AI systems audit or first workflow finder.	Pressure map, source inventory, first-lane recommendation, and risk view.
A clear process but no working surface	Forward engineering first sprint.	Clickable surface, route map, known limits, and next-stage blockers.
A tool that works in parts but not in operations	Architecture and launch readiness review.	Permission map, runtime decision, support model, and go/no-go record.
A failed or frightening rollout	AI recovery and staff enablement path.	Issue register, staff training plan, repair roadmap, and confidence loop.
Sensitive data or cost pressure	Local, private, or hybrid AI placement review.	Runtime matrix, data custody plan, fallback route, and vendor-exit view.
A useful pilot that needs care	AI operations support.	Monitoring rhythm, source refresh, release notes, incident path, and improvement backlog.

The last page of a packet should create the next controlled move.

Folium's handoff view separates what can be done now, what needs customer records, what needs approval, and what should wait until the review file is stronger.

DECISION GRID

REVIEW LENS

NEXT STEP

HANDOFF LANE	OWNER	NEXT RECORD
Business owner	AI discovery intake priority, acceptance criteria, and stop/continue decision.	Workflow decision note and next-stage gate.
Technical owner	Architecture, integrations, runtime placement, data movement, monitoring, and fallback.	Architecture map, route contract, and support guide.
Risk or review owner	Data boundaries, authority classes, blocked actions, evidence, and release conditions.	Boundary map, gate table, and evidence packet.
Operator or support owner	Daily workflow state, exception handling, escalation, recovery, and improvement rhythm.	Queue map, incident route, and operating handoff.
Folium delivery lead	Public-safe build coordination, evaluation, known limits, launch room, and handoff completeness.	Review file, release notes, and improvement backlog.

The strongest next step is narrow: one process, one owner, one source map, one working surface, one review file, and one decision gate.

The right AI project often starts before the buyer knows its name.

Use this packet when a company needs Folium to build the safe discovery, intake, analytics, and hidden-needs map that finds the first AI workflow worth building.

Bring the process

Name the business process, the systems involved, the people affected, and the decision this PDF should support.

Separate review from production

Keep public examples, sandbox review, pilot access, and production dependency in separate stages with clear owners.

Ask for the record

Request screenshots, browser checks, known limits, launch blockers, support plans, and the next approval path.