

AI Discovery Preparation Guide

Prepare one workflow for a senior, evidence-based discussion.

INTELLIGENT SYSTEMS. PRACTICAL RESULTS.

How this asset operates

Funnel stage	Sales-accepted discovery
Audience	Prospective sponsors and operating owners
Trigger	A workflow briefing or readiness discussion is scheduled
Objective	Improve discovery quality and reduce generic AI conversation
Primary CTA	Bring the prepared workflow and evidence to the briefing
Delivery method	PDF preparation guide
CRM action	Attach preparation status to meeting record
Follow-up	Briefing and factual summary
Compliance	Do not send sensitive files or credentials through ordinary email.
KPI	Prepared attendance, shorter discovery cycles and qualification quality

Prepare one workflow, not an enterprise-wide list. The goal is to make the decision and evidence explicit.

Describe the workflow

Trigger

Completed outcome

People and teams

Systems involved

Main steps

Common exceptions

Describe current performance

Volume

Cycle time

Cost / effort

Quality / rework

Risk / loss

Evidence source

Define the decision

Decision required

Executive sponsor

Operating owner

Decision deadline

Budget path

Prepare constraints

- ☐ Approved data categories known
- ☐ Sensitive or regulated data identified
- ☐ Required reviewers identified
- ☐ Prohibited actions identified
- ☐ Integration owners available
- ☐ Users available for testing

Bring to the briefing

- ☐ Workflow map or written description
- ☐ Current measures or samples
- ☐ Systems list
- ☐ Known incidents or failure examples
- ☐ Stakeholder and decision list

Do not send by ordinary email

- ☐ Credentials or secrets
- ☐ Production tokens
- ☐ Unapproved regulated data
- ☐ Privileged legal material
- ☐ Confidential files outside the approved channel

Decision record and limitations

Decision or conclusion

Evidence supporting the decision

Material limitations and assumptions

Accountable owner

Review date

Important

Do not send sensitive files or credentials through ordinary email.

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