



Secure AI Operations Platform

Enabling businesses to adopt everyday AI with built-in governance, intelligent orchestration, and real ROI visibility.



flowchestra.com



The Problem

Barriers to AI Adoption



KNOWLEDGE GAP

- Where do we start?
- Scattered Data and Systems
- What should we automate?
- Risk automating broken processes

Cost: \$35K+ for basic discovery



GOVERNANCE GAP

- No security or compliance frameworks
- Data confidentiality concerns
- Can't use ChatGPT on client or sensitive work
- Zero observability, audit trails, or controls

Risk: Regulatory exposure + data leakage



EXECUTION GAP

- Tools don't integrate into real workflows
- AI usage inconsistent across teams
- Requires prompt engineering skills
- Pilots don't scale into operations
- Manual data copying and fragmented workflows

Impact: 15+ hours/week wasted per employee



MEASUREMENT GAP

- Can't measure ROI
- No cost or usage visibility
- Fragmented tool spending
- Hard to justify value to leadership

Reality: 45% of AI initiatives never reach production

**Tech consulting firms feel this most acutely — but every SMB faces these gaps.
On average, companies waste \$50K+/year on fragmented AI experiments with no results.**

The Problem



Leaders are stuck between risky chaos...

The Problem



...or blocking AI entirely...

🔒 AI blocked: 0% adoption

📉 Productivity down 40%

😞 Employee satisfaction: Critical

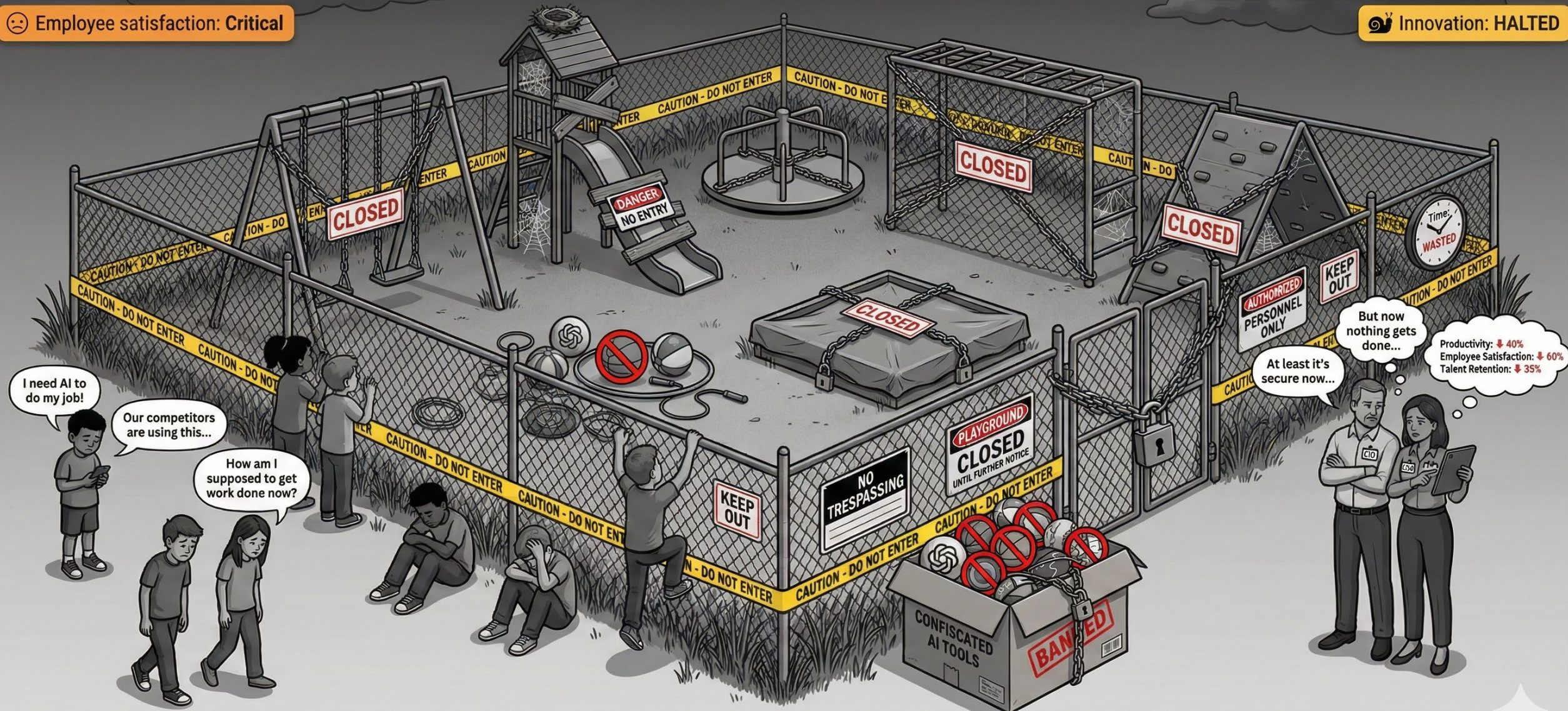
The Typical Response.

Lock it down - Block everything to eliminate risk.

😞 Employee satisfaction: Critical

🏃 Talent leaving for AI-enabled companies

🛑 Innovation: HALTED



I need AI to do my job!

Our competitors are using this...

How am I supposed to get work done now?

At least it's secure now...

But now nothing gets done...

Productivity: ↓ 40%
Employee Satisfaction: ↓ 60%
Talent Retention: ↓ 35%

Most companies solve chaos by blocking AI entirely—killing productivity and innovation.



Our Solution

Flowchestra — The Secure AI Operations Platform

Built for Financial Services Consulting, Tech Consulting, and operationally intensive teams.



PILLAR 1 — Secure by Default

The security foundation missing from every AI tool.

- Data protection, isolation & audit trails
- Active Prompt-Injection and Data-Leakage Prevention
- Policy enforcement, RBAC/ABAC, permissions
- Compliance-ready reporting (SOC 2, HIPAA, ISO)
- Multi-LLM orchestration with full observability

Outcome

Use AI securely on confidential, client-facing, and regulated work.



PILLAR 2 — Guided & Intelligent

Agents that guide users like it knows them.

- Persona-driven experiences by role and industry
- Pre-built workflow templates that “just work”
- Recommendations based on onboarding + real usage
- Use AI effectively without any prompt-engineering skills
- Unified workspace for apps, AI, and data

Outcome

10+ hours/week saved per employee. Agents and Employees working together with tailored output.



PILLAR 3 — Measurable & Unified

AI that leaders can measure, trust, and scale.

- Real-time dashboards for observability, usage, cost, ROI
- Human-in-the-loop controls for approvals
- Integrated with existing workflows + systems
- Eliminates fragmented AI tools across teams

Outcome

Prove ROI, manage costs, and scale AI with confidence and compliance in mind.

Flowchestra closes all four adoption gaps—Knowledge, Governance, Execution, Measurement.

One platform, a complete solution.

The Solution



AI needs guardrails — not handcuffs

**Governed AI that optimizes how the
business operates.**

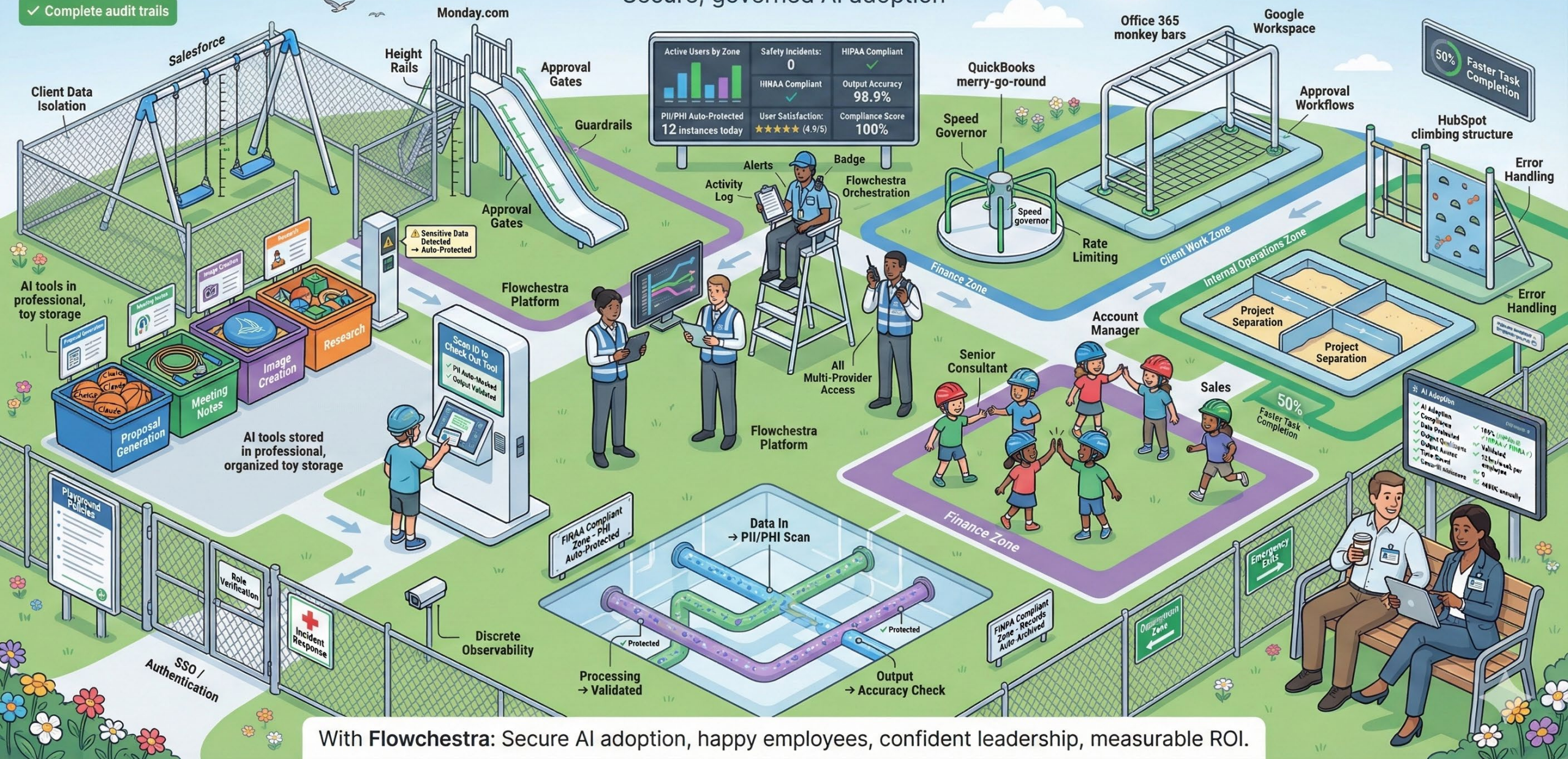
- ✓ 100% visibility into AI usage
- ✓ PII/PHI auto-detection & masking
- ✓ Output validation & accuracy checks
- ✓ Complete audit trails

The Flowchestra Solution

Secure, governed AI adoption



- ✓ HIPAA & FINRA compliant
- ✓ 94% employee adoption
- ✓ Zero compliance violations



With Flowchestra: Secure AI adoption, happy employees, confident leadership, measurable ROI.

How It Works



Onboard Fast

Define who you are, your teams, business context, compliance needs. Deploy in minutes.



Connect Everything

Integrate your documents, processes, and tools into one unified platform.



Agents Analyze & Recommend

Identifying bottlenecks and automation opportunities automatically.



Implement & Orchestrate

Deploy AI-driven workflows with intuitive, visual tools.



Secure & Observe

Built-in governance, security, and real-time observability.



Measure & Optimize

Track ROI and continuously improve as you evolve.



Our Wedge: Governance

Most AI Operations platforms bolt on Governance as an afterthought. Flowchestra built it in from day one.



ACCESS GOVERNANCE

Available Soon

Controls who can use which models, data, and tools — and in what context.

Examples:

- Model-level rules:
 - PII → OpenAI
 - PHI → internal models only
- Workspace & client isolation
- Client-side DLP + conversation/data classification
- Guardrails on tools, functions, and actions

Outcome

Security-first access and usage boundaries across roles, clients, and data types.



DATA GOVERNANCE

Post-Funding

Controls how data flows into AI, how it's trusted, and how it's retained.

Examples:

- Data flow observability across internal + external systems
- Freshness scoring & conflict detection
- Input tracing + semantic validation
- Retention & minimization policies

Outcome

An agentic data plane with trustworthy, explainable inputs.



OUTPUT GOVERNANCE

Q3 2026+

Controls the safety, accuracy, and compliance of AI outputs.

Examples:

- Hallucination detection & accuracy validation
- Bias/toxicity filters + explainability
- Industry compliance (HIPAA, SEC, FINRA)
- Consistency, completeness & policy-aligned responses

Outcome

Safe, repeatable, compliant outputs suitable for client-facing and regulated work.

Our Story



2007-2018: PREDICT

- Break-fix model → MRR MSP model
- Big 4 consulting experience
- 4x revenue growth (\$5mil → \$20mil)
- Learned to see market shifts early



2018-2023: BUILD

- MSP → MSSP | Security stack | Ops optimization
- Scaled 35 → 100+ people
- Built foundation for innovation



2023-2025: INNOVATE

- Built Entara's Innovation Team (Platform, BI, DevSecOps, & AI)
- Over 500 hours saved monthly
- Security & Innovation-shaped acquisition



2025: SCALE

- Innovation Team → Flowchestra
- Built by consultants, for consultants
- Now bringing a proven system to market

We've Done This Before

- Built and operated secure, governed, automation-driven service organizations for nearly two decades — including regulated financial environments
- Extensive expertise across consulting, security, operations, and service delivery
- Hands-on experience modernizing MSP/MSSP models and navigating compliance-heavy environments
- Deep vCISO experience for financial services firms
- Proven internal prototype: Innovation Team delivered measurable impact
- Unique cross-functional vantage point — AI applied across HR, Marketing, Security, Operations, Finance

Flowchestra Team



Raum Sandoval
CEO
(CISSP, Innovation leader)



Henry Steele
CTO
(Security & Platform Architect)



Matt Fitzgerald
CIO
(DevSecOps & Orchestration)



Competitive Landscape

Existing incumbents don't deliver what mid-market consultants actually need.

 **AI GOVERNANCE PLATFORMS**
Liminal | Knostic | Credo AI

What they do
Secure multi-model AI access with data protection, DLP, and observability for regulated enterprises

- Why they fall short**
- Governance-only—no workflow orchestration
 - Doesn't automate consulting operations
 - Built for large enterprises, not mid-market consultants
 - No multi-client workspace management

We beat them: Governance + orchestration + consultant-specific workflows

 **AI WORKPLACE PLATFORMS**
Glean | Dust.tt

What they do
AI workplace platforms that search company knowledge (Glean) or build custom agents (Dust.tt) across internal apps and data

- Why they fall short**
- Horizontal solutions—not built for consulting operations
 - No multi-client isolation or governance
 - Missing compliance frameworks (SOC 2, FINRA, HIPAA workflows)
 - No business context capture or compliance doc generation

We beat them: Vertical depth for consultants + multi-client governance + compliance automation

 **AI-FIRST CONSULTING PLATFORMS**
Moonnox | NexStrat AI | Consulting IQ

What they do
AI-powered platforms for consulting work—operations orchestration (Moonnox), strategy consulting (NexStrat AI), and advisory (ConsultingIQ)

- Why they fall short**
- Lacks governance depth for regulated clients
 - Strategy and professional services tools, not operational orchestration platforms
 - None capture full business context (goals, policies, assets) for compliance automation
 - Missing regulated workflow templates (RIA audits, SOC 2 prep, client onboarding)

We beat them: Full business context + compliance automation + multi-client governance + operational orchestration

The White Space We Own

Flowchestra is the only platform that combines:



Enterprise governance



Multi-client orchestration



Business context intelligence



Consultant-specific workflows

Why Now? The Perfect Storm



Governance Gap

90% of employees use AI tools—but 73% of companies have no governance policy and 63% of breached companies lacked AI controls.



Measurement Crisis

Companies invested billions in AI pilots, but 95% show zero ROI and 46% lack any framework to measure success or failure.



Trust & Compliance Crisis

Tech consulting clients demand audit trails and data controls before allowing AI on their work. SOC 2, HIPAA, and FINRA requirements now include AI governance—but most firms have nothing in place.



Competitive Pressure

AI-first boutiques are reshaping consulting by delivering leaner, faster lower-cost services — forcing traditional consultancies and MSPs to adopt AI workflows + governance to remain competitive.



The Window

Companies adopted AI for speed—now they need governance, measurement, and compliance to keep using it. Flowchestra is purpose-built to address all three—with foundational governance available today.



Our Moat



CONSULTANT-AS-CHANNEL NETWORK EFFECTS

Consultants use Flowchestra internally, recommend it to clients, and implement it as part of their services to optimize operations and drive AI adoption. Templates improve. Insights compound. Consultants leave lasting value for clients.

Why it matters

Built-in distribution and vertical depth create a compounding network and knowledge moat that horizontal tools cannot replicate.

GOVERNANCE BUILT IN FROM DAY ONE

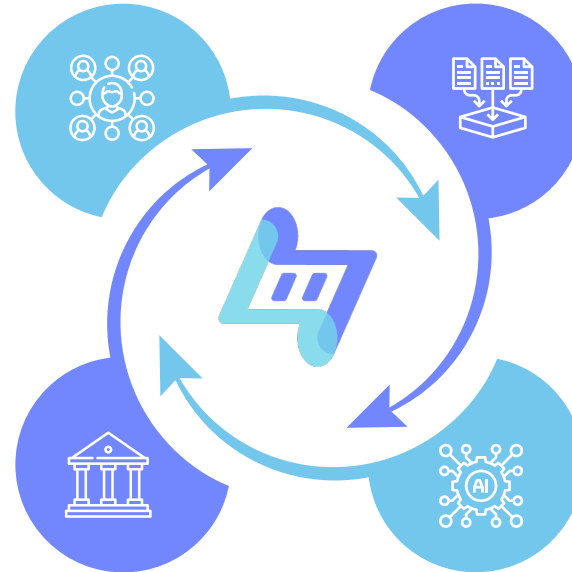
Most AI tools treat governance as an afterthought.

Flowchestra is the only platform with Security, Data Governance, and AI Safety built into the foundation — not bolted on.

Why it matters

Confidently use AI for confidential, client-facing, and regulated work because every step — access, data, output — is governed.

(Governance Deep dive: Slide 6.)



VERTICAL DEPTH & OPERATIONAL INTELLIGENCE

Generic AI platforms optimize for breadth. Flowchestra optimizes for depth in business consulting operations.

Why it matters

Pre-built workflows for policy creation, SOC 2 prep, client onboarding - Industry-specific compliance templates (SEC, FINRA, HIPAA) - Operational patterns captured from real consulting firms - Context-aware recommendations that understand consulting workflows.

THE DATA FLYWHEEL

Every workflow run, tool call, and interaction generates structured operational signals.

For organizations (internally)

Full-context organizational intelligence — revealing how teams work, which processes drive value, where time is spent, and how AI is impacting operations across clients, roles, and systems.

For consultants + Flowchestra (externally)

Anonymized operational telemetry that improves templates, benchmarks, and recommendations — accelerating onboarding and shaping platform intelligence.

Why it matters

Customers get clarity. Consultants get leverage. Flowchestra gets a compounding data moat that competitors cannot replicate.

We don't compete on AI models—those will be commoditized.

We compete on governance (years ahead), distribution (network effects), and intelligence (data compounds).

These advantages are structural and multiply over time.

Business Milestones Roadmap



2025

Foundation & Validation

Business Milestones

- Company founded (May 2025)
- MVP launched
- Alpha users live in tech & financial services contexts
- Early revenue from design partners + services

Governance Anchor:

Access Governance foundations established (“Safe enough to use AI internally + on client work”)

Q1 2026

First Revenue

Business Milestones

- 5–10 paying customers
- \$10–15K MRR
- First vertical validated: Tech Consulting
- Second vertical validated: Financial Services Consulting
- Early repeatability: workflow usage, ROI signals, retention patterns

Governance Anchor:

Access Governance operationalized across multi-client environments

Q3 2026

Product-Market Fit

Business Milestones

- 25–40 customers
- \$75–120K MRR
- Strong referral loops
- Consultant-led channel model generating repeatable revenue
- High retention + daily active usage

Governance Anchor:

Data & Output Governance pilots adopted (buyers begin selecting Flowchestra primarily because of governance)

Q2 2027

Scale

Business Milestones

- 100–200 customers
- \$300–500K MRR
- Expansion into 2 additional verticals (Health & Legal)
- Template marketplace widely used
- Partner ecosystem maturing (consultants, MSPs, MSSPs)

Governance Anchor:

Data Governance becomes core differentiator (prospects shortlist based on governance capabilities)

Q4 2027

Category Leadership

Business Milestones

- 500–1,000 customers
- \$1–2M MRR
- Recognized leader in AI governance + AI operations for mid-market
- Deep partner distribution
- Category position solidified: “The AI Operations Layer”

Governance Anchor:

Output Governance fully live:
(hallucination detection) (bias filters) (explainability)
SOC 2, HIPAA, FINRA, SEC, AI Regulatory compliance reporting

Access Governance → Data Governance → Output Governance mirrors the company’s journey from validation → scale → category leadership.

Market Opportunity



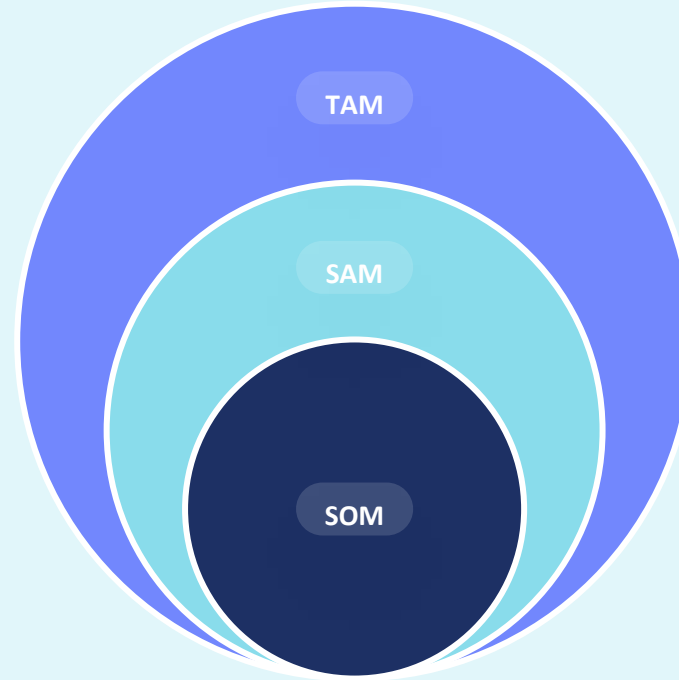
Market	2024/2025	2030-2032	CAGR
Workflow Automation & Orchestration	\$20.3B	\$32B+	~10%
Tech/AI Consulting & Advisory	\$9B	\$17B	~14%
AI Governance & Compliance	\$0.3B	\$1.3B	35%+
Total Relevant Market	\$29.6B	\$50B+	~13%

Sources: Gartner, Grand View Research, MarketsandMarkets

Note: Tech/AI consulting represents relevant subset of broader \$318.9B global consulting market

\$50B market by 2030. AI Governance growing 35%+ CAGR (fastest segment). We need 2-5% of our serviceable market—achievable penetration with significant expansion opportunity.

Why These Markets Converge:
 Consultants need automation (workflows) and governance (compliance) to deliver AI services to clients. AI governance is the fastest-growing segment and the missing piece preventing automation adoption.



\$50B (2030) - Global workflow automation + AI governance + relevant consulting

\$5B - US SMB professional services requiring governed AI workflows
 Tech consulting, financial services, MSPs, legal firms serving regulated clients

\$500M - Tech + Financial services consulting (Phase 1-2 focus)
 ~40K target firms × ~\$12.5K average contract

Market Share Needed
 Our 2027 targets = 2-5% of SOM
 1,000 customers × \$12-24K = \$12-24M ARR
 Achievable through consultant-as-channel distribution

Expansion Headroom
 Healthcare + Legal (\$200M+ SOM), Enterprise tier (4-5x ARPU), International (2x TAM)

Go To Market + Audience



TARGET ICPS



Financial Services Consultants & Advisory Firms



Tech Consulting Firms, MSPs & MSSPs



Why these verticals:

Operationally intensive teams that cannot use ChatGPT on confidential client data, must prove compliance (SOC 2, SEC, FINRA), and require measurable, auditable ROI.

Tech consultants also sell to clients — creating double revenue opportunity and built-in distribution.



Founder–Market Fit:

- Extensive MSP and Consulting experience
- Warm existing network
- Prototype proven inside Entara Innovation Team



Strategy Explained

Land with consultants (founder-led), expand through their clients (trusted advisor endorsements), scale via partnerships and self-service. Built-in distribution through consultant networks.



How We Reach Them

Partnerships with MSPs, MSSPs & Consulting Firms

Leverage existing relationships to embed Flowchestra into advisory and managed service offerings.

Design Partner & Early Alpha Relationships

Collaborate with select firms to validate high-value workflows and shape the roadmap.

Industry-Specific Use Cases

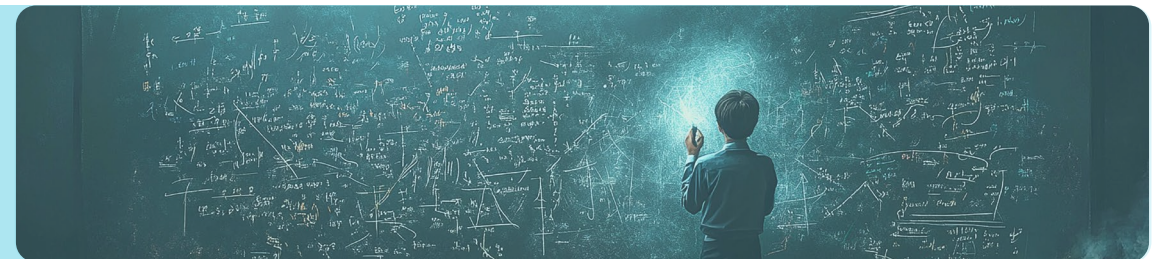
Provide ready-to-use workflows for consulting, finance, and legal — including audit prep, compliance docs, and client onboarding.

Create Product Evangelists

Turn consultants, fractional CISOs/CTOs, and MSP leaders into internal champions.

Raise Awareness

Webinars, blogs, case studies, and events focused on AI governance and operational excellence.



Business Model & Pricing



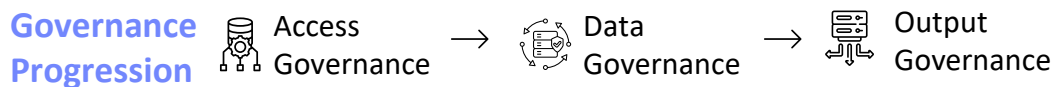
Dual Revenue Model

Period	SaaS (Platform) %	Services %	MRR (Indicative)	Gross Margin (Estimated)
2025 – Q1 '26	~ 40%	~ 60%	\$10–15K	~ 55%
Q2 – Q3 '26	~ 50%	~ 50%	\$75–120K	~ 65%
2027+ (scale)	~ 90%	~ 10%	\$1–2 M	~ 75%+



Platform Pricing

Tier	Price/User	Min Users	Annual Value	Target Customer
Solo	\$50/mo	1	\$600	Individual consultants
Team	\$100/mo	2	\$2,400+	Small firms
Company	\$200/mo	10	\$24,000+	ICP: SMB consultants, RIAs, MSPs
Enterprise	\$300/mo	30	\$108,000+	Mid-market, compliance-heavy



Implementation Services

Offerings: Discovery, workflow, integration, compliance documentation (\$2.5K-25K)

Purpose: Accelerate time-to-value, validate product-market fit, fund development

Mix: 60% services early → 10% at scale



Unit Economic Projections

LTV (3-year): \$50K-75K (Company tier, 15-20 seats, 80%+ retention)

CAC: \$1-3K (founder-led), \$6-10K (scaled)

LTV:CAC: 20-25:1 (founder-led), 6-8:1 (scaled)

Payback: 4-6 months (scaled)

Gross Margin: 75-80% (SaaS), 75%+ target (2027)



Path To Profitability

M1 (Q1 '26): Services revenue covers operating costs

M2 (Q2-Q3 '26): Cash flow positive

M3 (2027): Capital-efficient SaaS growth

Accessible entry tier (\$50) drives adoption. Company tier (\$24K ACV) targets ICP. Services accelerate value and fund development. Proven unit economics create clear path to profitability.

Founders Opportunity



Current Focus



Actively fundraising



Product, Infrastructure, People, Pipeline



Contribute expertise in product-market fit and vertical expansion

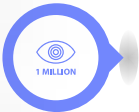


Marketing, infrastructure, and accelerate growth

Why This Is Low-risk



MVP built - Not funding R&D



Market validated - 18 years operating experience



Pipeline ready - Warm network + design partners



Path to profitability - Cash flow positive by Q2 2026)



Fast payback - ~4-6 months to recover CAC

Seeking Investment



\$500k - \$1M

to support Phase 3 development and beyond



5%-8%

Equity

Potential Exit Strategies



5 years

Acquisition within



7 years

IPO within

THANK YOU

LIVE DEMO





Sign in to Flowchestra

Welcome back! Please sign in to your account.

Google

GitHub

Slack

Microsoft

OR CONTINUE WITH YOUR EMAIL

Email address

Enter your email

Password

Enter your password

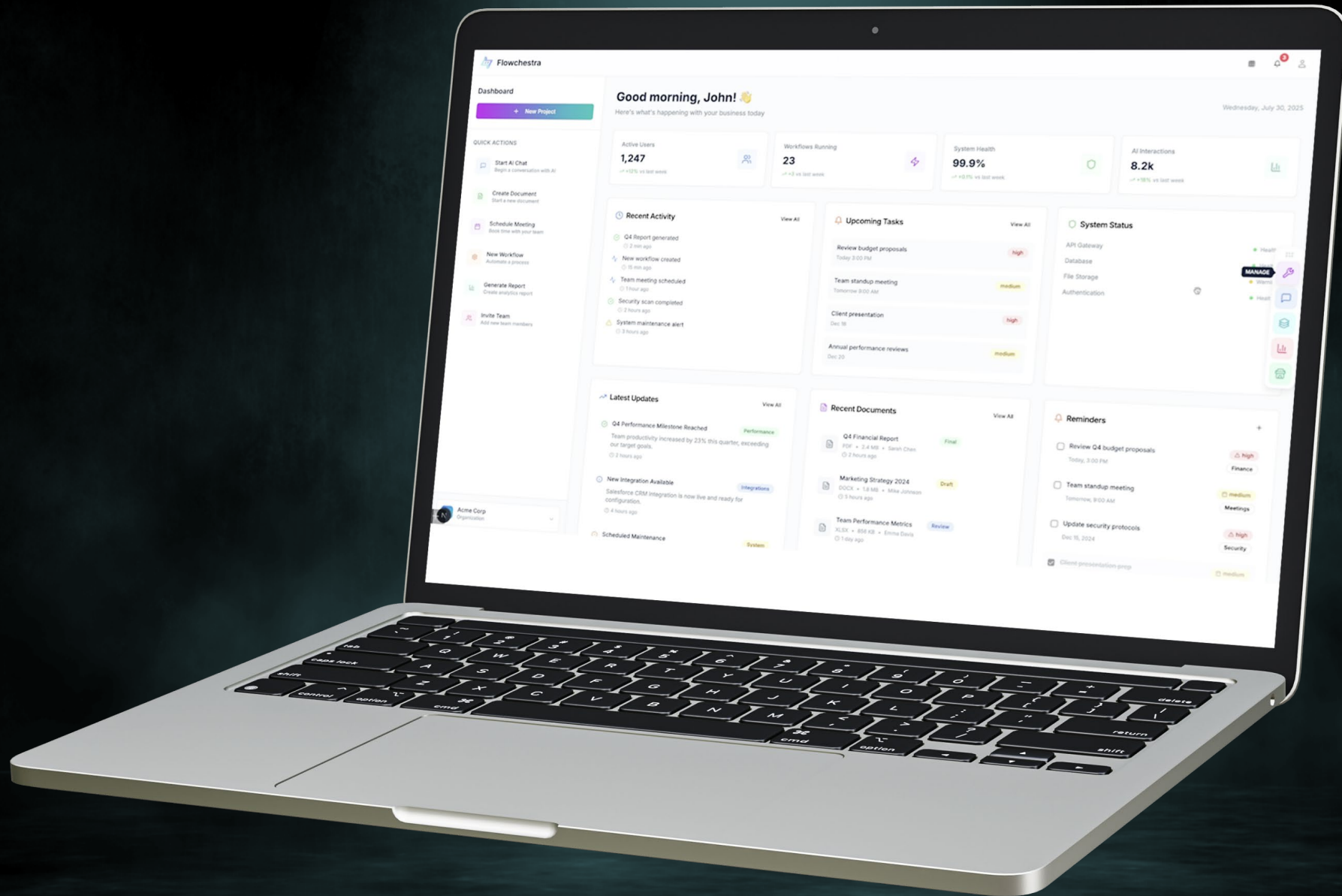
Sign in

Development Mode

Email: admin@flowchestra.com | Password: admin123

Email: user@flowchestra.com | Password: user123

MFA Code: 111111



QUICK ACTIONS

- Start AI Chat
Begin a conversation with AI
- Create Document
Start a new document
- Schedule Meeting
Book time with your team
- New Workflow
Automate a process
- Generate Report
Create analytics report
- Invite Team
Add new team members

Active Users

1,247

↑ +12% vs last week

Workflows Running

23

↑ +2 vs last week

System Health

99.9%

↑ +0.1% vs last week

All Interactions

8.2k

↑ +5% vs last week

Recent Activity

- Q4 Report generated
2 min ago
- New workflow created
10 min ago
- Team meeting scheduled
1 hour ago
- Security scan completed
2 hours ago
- System maintenance alert
3 hours ago

Upcoming Tasks

- Review budget proposals
Today 3:00 PM High
- Team standup meeting
Tomorrow 9:00 AM Medium
- Client presentation
Dec 10 High
- Annual performance reviews
Dec 20 Medium

System Status

- API Gateway
- Database
- File Storage
- Authentication

Latest Updates

- Q4 Performance Milestone Reached
Team productivity increased by 23% this quarter, exceeding our target goals.
2 hours ago Performance
- New Integration Available
Salesforce CRM integration is now live and ready for configuration.
4 hours ago Integrations
- Scheduled Maintenance
System

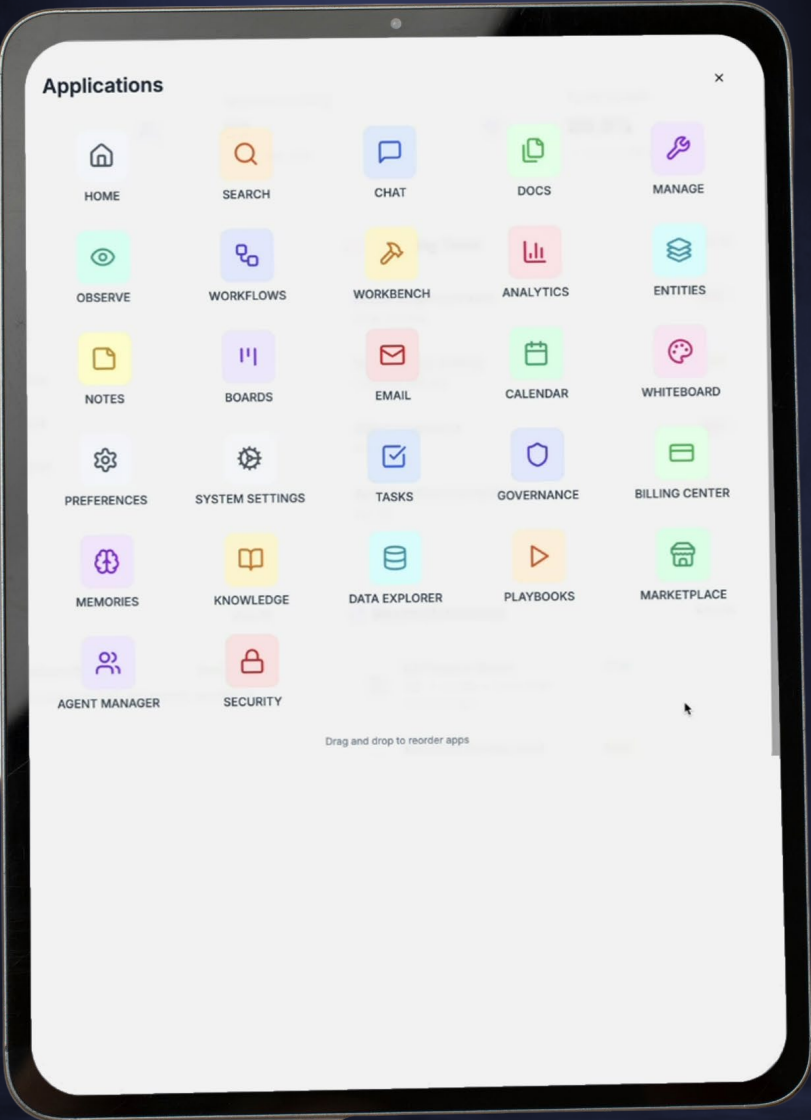
Recent Documents

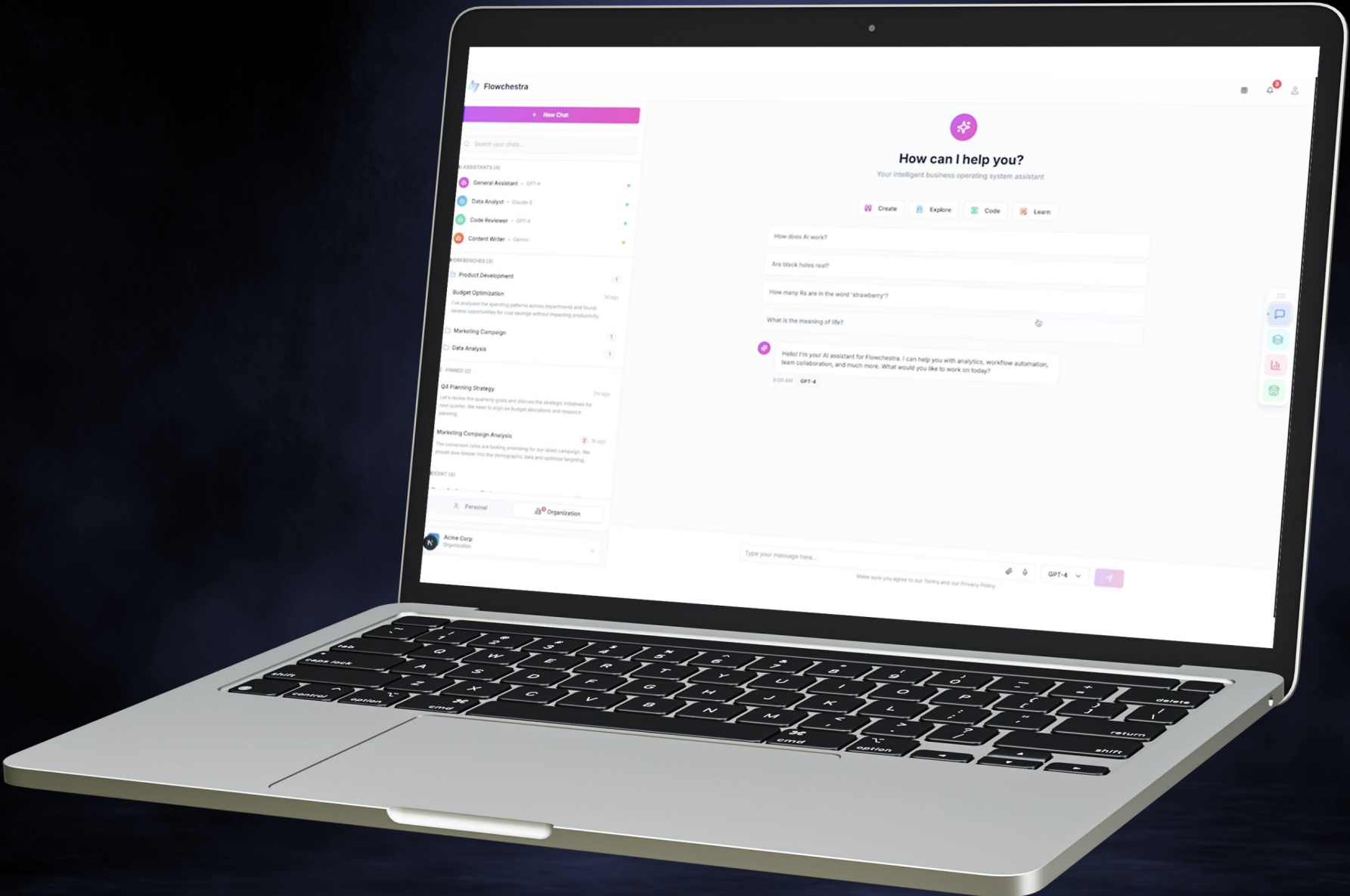
- Q4 Financial Report
PDF • 2.4 MB • Sarah Chen
2 hours ago Final
- Marketing Strategy 2024
DOCX • 1.8 MB • Mike Johnson
3 hours ago Draft
- Team Performance Metrics
XLSX • 856 KB • Emma Davis
1 day ago Review

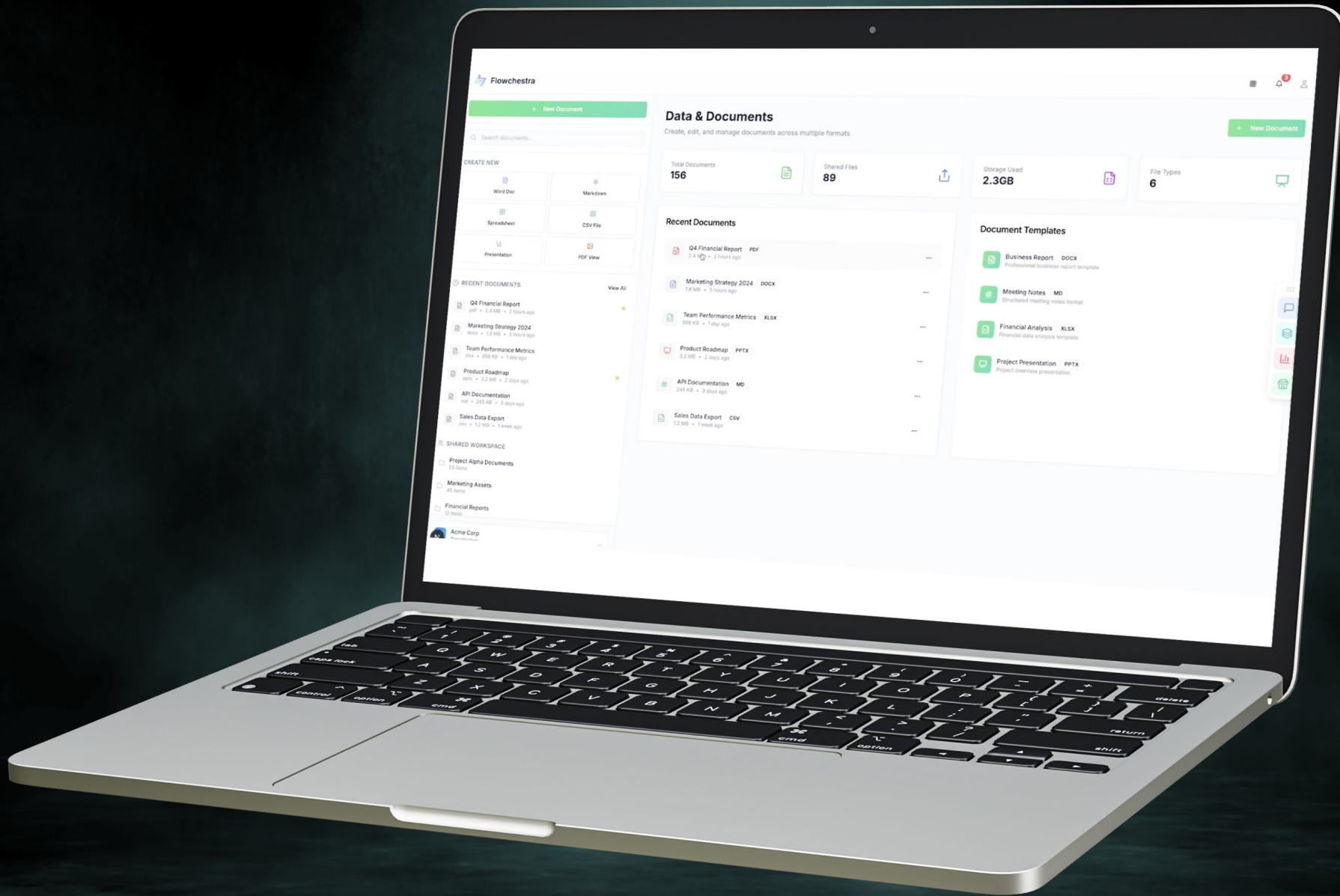
Reminders

- Review Q4 budget proposals
Today, 3:00 PM High
- Team standup meeting
Tomorrow, 9:00 AM Medium
- Update security protocols
Dec 10, 2024 High
- Client presentation prep
Medium

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Organization







+ New Document

Data & Documents

Create, edit, and manage documents across multiple formats

+ New Documents

CREATE NEW

Word Doc Markdown
Spreadsheet CSV File
Presentation PDF View

RECENT DOCUMENTS

- Q4 Financial Report
pdf • 2.4 MB • 2 hours ago
- Marketing Strategy 2024
docx • 1.8 MB • 5 hours ago
- Team Performance Metrics
xlsx • 858 KB • 1 day ago
- Product Roadmap
pptx • 3.2 MB • 2 days ago
- API Documentation
md • 245 KB • 3 days ago
- Sales Data Export
csv • 1.2 MB • 1 week ago

Recent Documents
Q4 Financial Report PDF 2.4 MB • 2 hours ago
Marketing Strategy 2024 docx 1.8 MB • 5 hours ago
Team Performance Metrics XLSX 858 KB • 1 day ago
Product Roadmap PPTX 3.2 MB • 2 days ago
API Documentation MD 245 KB • 3 days ago
Sales Data Export CSV 1.2 MB • 1 week ago

Document Templates

- Business Report DOCX
Professional business report template
- Meeting Notes MD
Structured meeting notes format
- Financial Analysis XLSX
Financial data analysis template
- Project Presentation PPTX
Project overview presentation

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Appendix & Optional Slides



High- Priority Feature Backlog



01

Risk and Compliance Hub

Gain visibility and implement compliance guardrails

02

Persona Templates and Guidance

Pre-built roles and guidance for new users.

03

Multi-Participant Chats

Collaborative AI-assisted discussions and workflows.

04

ROI Savings Widget

Dashboard component to track real-time cost and time savings.

05

Recommended Default LLM

Smart-selected model based on the user's specific role.

Meet the Founders



Raum Sandoval
(CEO)

- Served on leadership team of MSP/MSSP, Entara, to successful exit.
- Successful exit from SaaS Cybersecurity Resiliency solution, Forecheck
- CIISO with 18+ years in MSP/AI/Security

- Worked with all of the Big 4 (EY, Deloitte, KPMG, and PWC) including securing \$10mil ARR global deal with EY Forensic & Integrity Services
- Built and scaled technical teams across enterprise, mid-market, and startup levels
- Expertise in legal/financial industries delivering security & automation
- Experienced in Systems, Network, and Cloud Infrastructure
- Delivered zero-trust architecture, cloud security, and IT orchestration frameworks
- Provide vCISO services aligning security, compliance, and business growth
- Integrated ServiceNow, SOAR, BI, and DevSecOps into secure service delivery

Meet the Founders



Matthew Fitzgerald
(CIO)

- AI Architect and Serial Entrepreneur
- Built \$100K+ ROI BPA solutions, LLM, ML, & neural network expertise
- Integrated CRM, Helpdesk, and proprietary platforms for seamless operations
- Delivered 100+ business process automation projects across web, mobile, and desktop platforms
- Researched and Designed ML interfaces for neural network training and object detection at Purdue University
- Led DevSecOps teams driving innovation in AI and cybersecurity solutions, saving over 1000 monthly manhours.
- Built custom AI tools to automate complex business, personal, and security workflows
- Architected secure CI/CD pipelines and global network monitoring systems

Meet the Founders



Henry Steele
(CTO)

- DevSecOps & AI Architect
- Built and led Entara's premier Managed Services and Security Operations teams
- Founded Studio Riptide to deliver next generation gaming
- Developed threat detection and SOAR-driven security workflows
- Expert in public/private cloud and infrastructure ops
- Bridges business goals, compliance, and security execution
- Proven leadership in cybersecurity and DevSecOps environments
- Champion of process optimization through automation-first mindset
- Trusted advisor and account manager for enterprise clients
- Delivered white-glove support and executive-level infrastructure oversight



Customer Personas: CEO / Founder



James Rivera

CEO / Founder

Industry: Fast-growing SMBs (B2B, SaaS, Services)

Company Size: 20–150 employees

Pain Points



Struggling to scale without increasing headcount

Wants competitive edge via innovation

Frustrated with tool fragmentation and inefficiencies

Goals



Position company as tech-forward

Use AI to punch above their weight

Enable automation across departments

Why Flowchestra?



Turnkey SaaS + expert guidance = fast deployment

Scalable roadmap from disorganized data to full AI integration

Builds a foundation for long-term growth and valuation



Customer Personas: Compliance & Risk (CISO)



James Rivera

CEO / Founder

Industry: Midsize Financial Services
Advisory Firm

Company Size: 200-1000 employees

Pain Points



Increasing pressure to adopt AI without compromising security
Concerned about ungoverned AI usage by employees and shadow tools
Fragmented systems creating blind spots in risk, data flow, and auditability

Goals



Implement secure, governed AI adoption across the organization
Gain full visibility into workflows, data flows, and AI activity
Ensure every workflow and agent adheres to policies and controls

Why Flowchestra?



Security-first architecture with built-in audit logs and access controls
Secure, resilient orchestration with approvals and credential vault
Governance layer turns AI from liability into compliant capability fueling AI growth



Customer Personas: **The Strategic CFO**



Priya Nair

Chief Financial Officer

Industry: FinTech or Regulated SMBs

Company Size: 100–500 employees

Pain Points



Rising operational costs with diminishing returns
Seeking automation to improve margins
Skeptical of expensive enterprise AI solutions

Goals



Maximize efficiency through technology
Justify spend with measurable ROI
Ensure compliance while scaling operations

Why Flowchestra?



Affordable, tiered pricing designed for SMBs
Demonstrates ROI in both onboarding and long-term use
Expert consulting helps avoid costly missteps



Customer Personas: **The Overwhelmed IT Leader**



David Lin

IT Manager / Director of Technology

Industry: Professional Services, Nonprofits,
Financial Firms

Company Size: 50–200 employees

Pain Points



Understaffed IT team with reactive workflows
Too many SaaS tools with overlapping or unused features
Wants to implement AI but lacks time and budget

Goals



Streamline helpdesk and back-office operations
Build an internal roadmap for tech automation
Ensure safe AI adoption

Why Flowchestra?



Combines professional services + productized automation
Offers architectural guidance and security best practices
Reinforcement learning means less manual optimization over time