

The logo for Folio, featuring the word "folio" in a thick, red, cursive script. The letter 'f' is particularly large and stylized, with a long vertical stroke that loops back up. The dot on the 'i' is a solid red circle.

folio

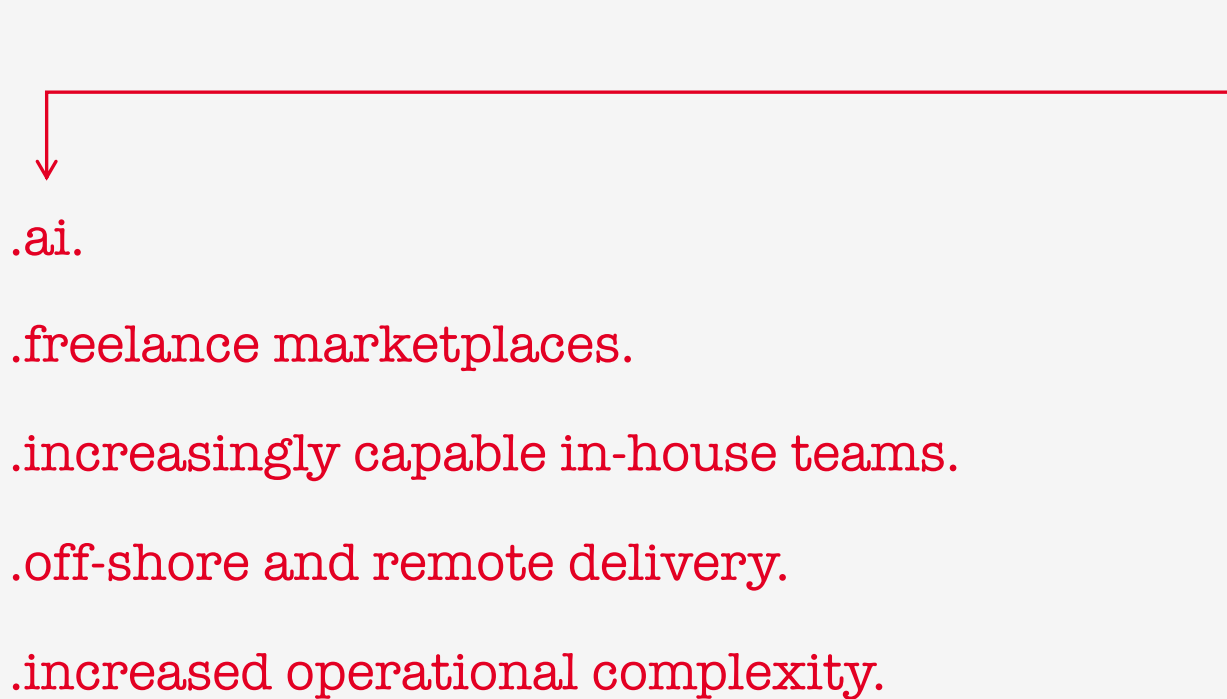
The AI Co-Worker for Agencies.

Problem	Our solution	Opportunity	Our team	Funding need
<p>Professional services firms / agencies face major disruption from:</p> <ul style="list-style-type: none">→ new types of competitors,→ increasingly capable internal teams→ AI and automation	<p>We have developed the world's first comprehensive agentic AI platform for professional services.</p> <p>We support a broad range of capabilities across admin, service delivery, account management, and more...meaning our offering applies to all agencies: financial advisory, marketing, consulting, legal, architecture, etc.</p>	<p>Professional services in the UK is a £90bn market, and the US market is worth \$400bn.</p> <p>We believe that Folio can remove as much as 40% cost reduction for all types of professional services business.</p>	<p>Two technical founders with a background in AI and natural language processing, and a combined 45 year's experience in professional services.</p>	<p>We are seeking a pre-seed investment of £1.5m to get us to approx. £1 ARR and unlock our seed round.</p>

Why are we different

Our origin story tells how Folio was born within a professional services business, as the solution to an industry wide problem. The industry insights, industry- and problem-oriented development process, and leading-edge AI expertise makes us unique.

.the professional services sector ¹ is facing huge disruption.



.successful agencies now need to be built on a different platform.

¹ Professional services (for us): Consulting, Accountancy, Legal, Marketing, Digital.

.the change required to survive is significant.

.in-house team. —————> .in-house + freelance + agent team.

.resource management. —————> .orchestrate and QA.

.up to 40% on operations tasks.¹ —————> .close to 0% on operations tasks.

.focus on deliverables. —————> .focus on client value.

.successful agencies now need to be built on a different platform.

¹ Operation cost range by sector: Consultancy (20 to 30%, Managing Partners' Forum (MPF), Accounting 20 to 40% (ICAEW), Legal (25 to 35%) Thomson Reuters Peer Monitor

.traditional agencies will **struggle to adapt**.

.the old-world solutions of recruitment, training, and building large support functions will not work any more.

.agencies need to find a way to...

...put ai to work across the organisation **to eradicate the operations overhead**.

...build a blended workforce **so you can scale your expertise as required**.

...and make all this work in a really easy way.

.successful agencies now need to be built on a **different platform**.

.Folio enables **radically different** ways of working.

.old world (example project).

.total project effort: **42hrs.**

.operations overhead: **10hrs (24%).**

.chargeable work: 32hrs.

...workshop, meeting notes, follow-up, deliverable development

.operations work: 8hrs (+ 2hrs review).

...expenses, benefits, timesheets, billing, travel booking, CRM, knowledge management, team briefings, meetings

.new world (with Folio).

.total project effort: **20hrs.**

.operations overhead: **<1hr (<5%).**

.automated diary management.

.automated expense management.

.automated timesheet management.

.automated knowledge management.

.automated project management.

.automated customer success.

...

.enabling agencies to run up to **40% leaner.**¹

¹ 40% is based on an overall analysis, including both project time and downtime across all teams.

.the secret is turning entire processes into **micro-interactions**



Folio

Hi Suzi.
You have two new hires in your team starting on 1st August. I will be running their onboarding.

I have started the process and need to organise their company intro sessions.

I see that you are on PTO on 1st August for one day only. Would you like to delay their department intro session, or would you prefer to get someone else to run it?

Ah - I completely forgot about that.

Can you ask Miki if he can do the general session?

And I was thinking of Ana and Scott as their onboarding buddies. Does that work?

Okay.

Miki is working that day. I will ask him if he can do it.

Ana works as an onboarding buddy for one of the new recruits, but Scott is the wrong grade. Emer is working that week and is the right grade. Should I ask her?

That works. Please let me know when you get it all arranged.



Folio

Hey Folio

Could you please pull together an update email for Bob at Acme. I would like to provide a summary of how the project is going, and when he can expect to receive which outputs.

When you have it drafted can you check with the team to see if they have any corrections or additions?

Hi Jorge.
No problem. Is there a specific deadline for this?

I want to send before the end of the week.

Okay.
And do you want to review it before it goes?

Yes.

Got it. Leave it with me.



Folio

Hi Folio - could you plan and run tomorrow's Acme standup? I'm expecting everyone to attend.

Hi Jorge.
No problem.

I will make sure everyone knows you're expecting them, collate the topics that they want to discuss, and add the list to the calendar invite as an agenda.

Is there anything specific you want to go through?

I don't think so. I just need to catch up on where everyone is up to and make sure we are in control of the project.

Okay. Leave it with me.

I will include an item on preparing for deliverable deadlines.

See you then.



Folio

Hi Jorge. I am just doing your expenses. You bought breakfast while travelling for the Acme project yesterday.

Do you have a paper receipt?

Hey Aida. I do. Let me send it now.



Thanks. That is it all done now.

Just let me know if there is anything else you need.



Folio

Hey Suzie. I am just about to submit your timesheet for today. I know you were in meetings for the Acme project all morning.

Did you stay working on that for the rest of the day?

Hey.
Mostly.
I also did a recruitment interview and spent an hour or so on BD.

Thanks. That is it all done now.

Just let me know if there is anything else you need.

.enabling agencies to run up to **40% leaner**.

.this is only possible with a **unified operations** platform.

- ✓ Insight into **clients**, **project allocations** and **schedules**.
- ✓ Insight into **expense** and **benefit** spend (including via **Folio card**).
- ✓ Access to optimise corporate **knowledge bases** and **CRM**.
- ✓ Access to manage **diaries**, **meetings**, and more.
- ✓ Automated **management and review** via a unified workflow engine.
- ✓ All built on strict policies with **human-in-the-loop**.

.enabling agencies to run up to **40% leaner**.¹

.hugely scalable, hugely capable, in **any channel**.

Best practice professional services processes and policies

(Expenses, timesheets, benefits, onboarding, knowledge management, customer success, diary management, meeting management, ...)

AI-first design
(Natural language)

Any Channel
(App, Voice, Email,
Messaging)

Unified
data store

Unified
workflow and
policy engine

Multi-agent
collaboration

Folio card

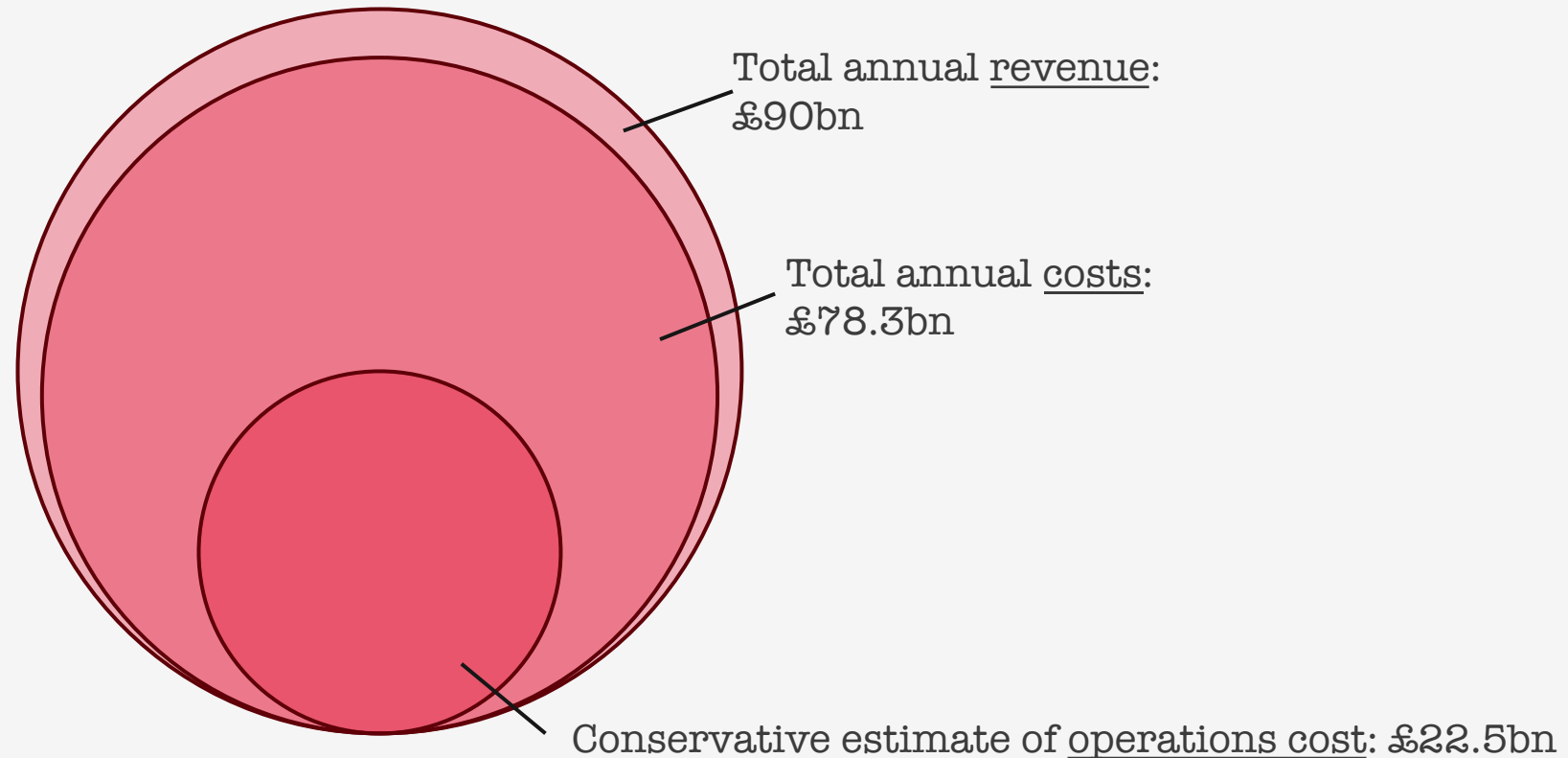
Spend
management

Access
management

.the platform for successful agencies.

.this is a large market, with a huge **international opportunity**.

UK Professional Services



.we are uniquely positioned to solve the **business model** problem.

.traditional software solutions.



.GUI-based.

.multi-functional. ✓

.limited automation (yet).

→ .not fit for the new world.

.strategy → integrate or replace.

.toolkits.



.ai-native. ✓

.agent orchestration. ✓

.not industry specialised.

→ .not specialised enough.

.strategy → observe or use.

.emerging agentic solutions.



.ai-native. ✓

.narrow / single-function.

.mixed industry specialisation.

→ .helps with individual processes.

.strategy → agent contractors.

.ai-native. ✓

.multi-functional. ✓

.agent orchestration. ✓

folio

→ .solves the business model problem.

.extensible. ✓

.industry specialised. ✓

.delivers true automation. ✓

.we have lived and breathed **professional services** for 25 years.



NIALL LAVERY, CEO



SIMON MARKS, CTO



.we are raising £1.5m to get to c. £1m ARR and a seed round.

.people costs.

.2 senior full-stack AI engineers ¹.

.automation designer ¹.

.agentic sales director ¹.

.marcomms lead ¹.

.founder salaries.

.external spend.

.brand building campaigns.

.sales & success tooling.

.advisors.

.strategic IP lawyer.

.AI & data legal advisor.

.ex-SaaS CFO (fractional).

.other opex.

.incentives buffer.

.3m runway buffer.

.travel, tech, etc.

.target funding partner.

> single lead investor

> enterprise AI experience

> active involvement

.target advisory board set-up.

> founders

> funding partner

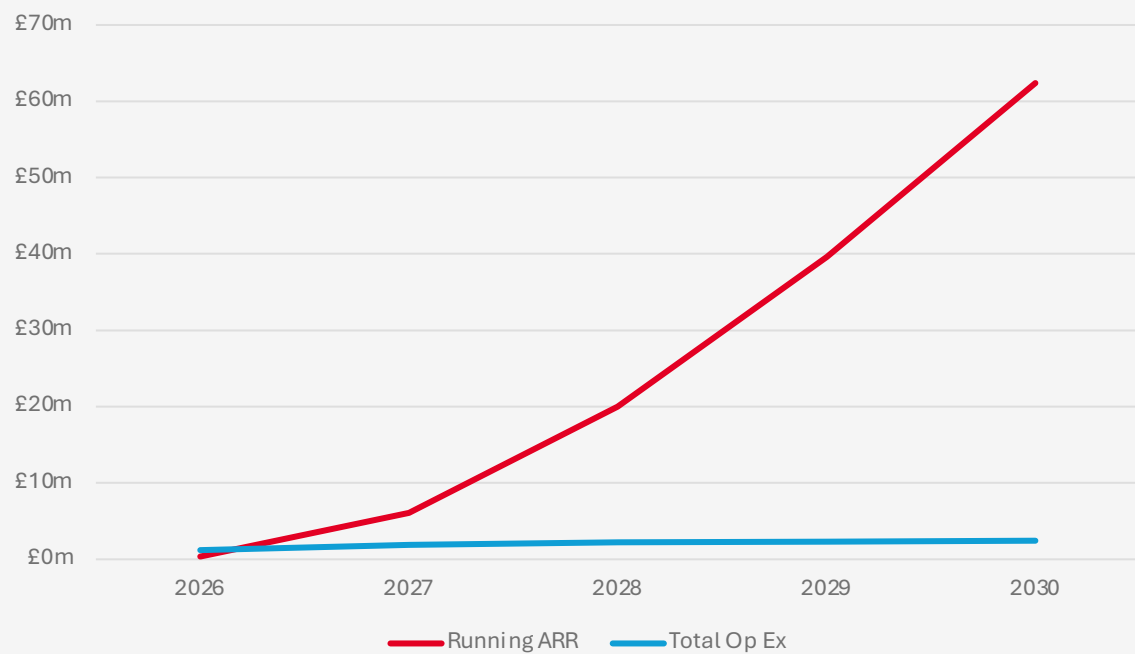
> fractional CFO

> 2-3 high value non-execs

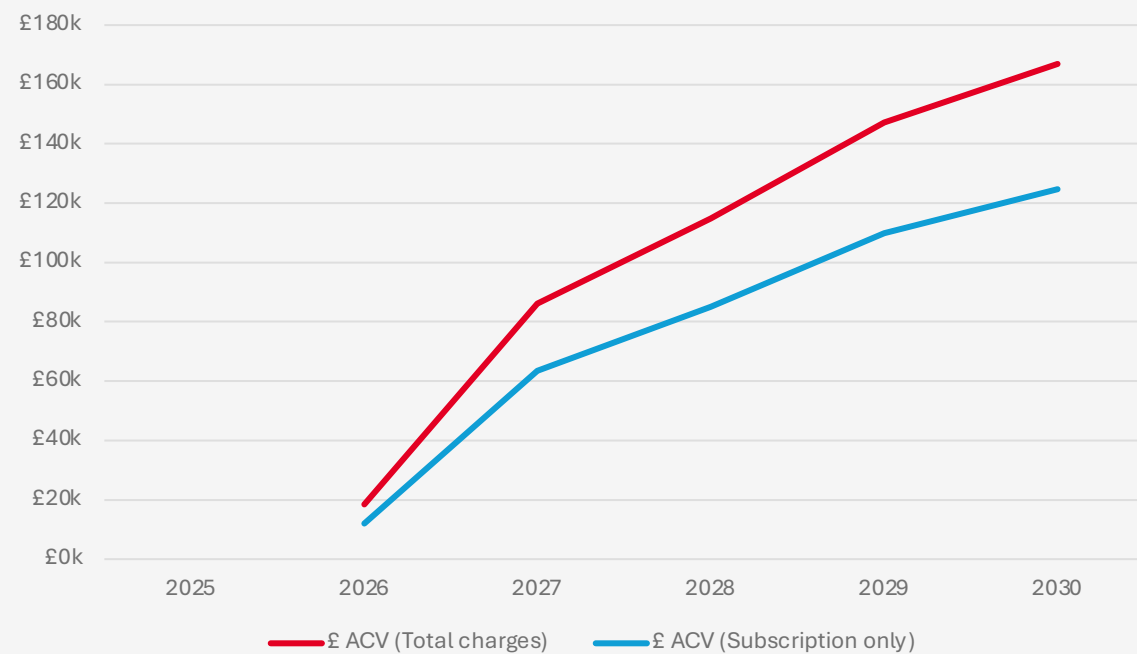
¹ Priority hires for 2025/26

.commercial forecast.

£m ARR and OpEx



£k ACV



folio

Any questions?

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