



FORMLESS SOLUTIONS

Diagnostic Request

Initial investigative questionnaire and preliminary framing

WORKING DOCUMENT • CONFIDENTIAL INFORMATION

This document structures the initial investigation, identifies the most likely fit among the three diagnostics, and prepares the request for evidence and stakeholder conversations.

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02 / GUIDANCE AND IDENTIFICATION

Guidance and request identification

This questionnaire supports triage and framing. It does not replace interviews, evidence validation, or scope confirmation.

HOW TO USE

Complete digitally or by hand. If more space is needed, attach a page that identifies the corresponding question.

SECURITY BOUNDARY

Do not include passwords, keys, trade secrets, sensitive personal data, or raw datasets at this stage. Describe the material and agree on a secure channel after framing.

IDENTIFICATION**Requester name *****Organization *****Role / title *****Work email *****Phone (optional)****Website / organization profile****Short title for this request ***

03 / DECISION AND OUTCOME

Decision, context, and desired outcome

Define the decision before the tool. A good framing makes clear who decides, by when, with what evidence, and which options are genuinely under consideration.

What decision needs to be made? *

Why does this need to be resolved now? *

What observable outcome would indicate that the decision was sound? *

Final decision owner *

Decision deadline or window *

Options already considered: build, buy, integrate, automate, train, redesign, defer, or stop

04 / WORKFLOW AND SCOPE

Workflow, boundary, and initial scope

Describe the actual work, including exceptions and handoffs across people or systems. Avoid describing only the ideal process.

Where does the workflow start and end? What triggers it, and what output completes it? *

Main steps, owners, and work handoffs *

Exceptions, rework, queues, manual decisions, or failure points *

Number of workflows involved *

Approximate frequency / volume

What should remain explicitly outside the diagnostic?

People, decision rights, and governance

Identify who executes, reviews, approves, maintains, and experiences the consequences of the workflow. The list may change after framing.

Estimated number of participants *

Teams / functions involved *

Who recommends, decides, approves, and operates? *

Recent changes, incentives, resistance, dependencies, or capability gaps

SUGGESTED INTERVIEW CONTACTS

Name / role	Relationship to workflow	Interview topic	Availability

06 / EVIDENCE AND DATA

Evidence, data, and available materials

At this stage, indicate what exists and where it is. Access will be requested only after confirming need, channel, and ownership.

SOURCE INVENTORY

- | | |
|---|--|
| ☐ Process maps, SOPs, policies, or checklists | ☐ Real cases, input/output examples, or anonymized samples |
| ☐ Metrics, SLAs, reports, dashboards, or indicator definitions | ☐ Architecture, integrations, schemas, data dictionaries, or catalogs |
| ☐ Backlog, incidents, complaints, audits, or post-mortems | ☐ Model evaluations, prompts, logs, tests, or review criteria |

Where are these materials, and who can authorize access? *

Which current measures describe time, quality, cost, volume, risk, or satisfaction?

Known gaps: missing data, inconsistent definitions, bias, access, or quality

IMPORTANT

Do not include passwords, keys, trade secrets, sensitive personal data, or raw datasets at this stage. Describe the material and agree on a secure channel after framing.

07 / TECHNOLOGY AND AI

Technology, software, data, and AI

Complete only what applies. The purpose is to locate technical dependencies and evaluation criteria, not to perform an audit at this stage.

Systems, tools, spreadsheets, APIs, and integrations involved *

Input/output data, origin, update cadence, storage, and owners

Current or proposed use of AI/ML, automation, RAG, or agents; include the human role

How are — or should — quality, error, safety, cost, and behavior be evaluated?

Technical constraints: legacy, vendor, access, security, performance, budget, or timing

08 / RISK AND READINESS

Risk, constraints, and readiness

The analysis considers operational consequences, human review, dependencies, and reversibility. Flag risks even when they are not yet quantified.

What happens if the workflow or decision fails? Who is affected, and how reversible is the harm? *

Privacy, security, contracts, regulation, intellectual property, or other obligations

Budget, timing, availability, technology, policy, or organizational-change limits *

Which access, examples, and people can be available during the diagnostic? *

Preferred start window

Scheduling constraints

What have we not asked that could change the framing?

09 / PRELIMINARY FRAMING

Preliminary framing across the three diagnostics

The framing below is an initial hypothesis. Formless Solutions confirms the level after reviewing the request, sources, and participant availability.

Essential

One focused workflow or decision

- 1 workflow
- up to 2 conversations
- low technical interdependence

Systems & AI

One critical, technically deep workflow

- data, software, automation, or AI
- up to 4 conversations
- evaluation and risk criteria

Integrated

Connected workflows and decisions

- 2–3 workflows
- up to 6 participants
- cross-functional dependencies

COMPLEXITY INDICATORS

- | | |
|---|--|
| ☐ More than one workflow or connected outcome is involved. | ☐ The decision crosses more than one team or function. |
| ☐ Data, software, architecture, automation, or AI is central to the problem. | ☐ Material risk, low reversibility, or control obligations are present. |
| ☐ More than four people need to provide evidence or join conversations. | ☐ Evidence quality or definitions remain uncertain. |

REQUESTER HYPOTHESIS

- | | | | |
|------------------------------------|---------------------------------------|-------------------------------------|---------------------------------------|
| ☐ Essential | ☐ Systems & AI | ☐ Integrated | ☐ Not sure yet |
|------------------------------------|---------------------------------------|-------------------------------------|---------------------------------------|

Briefly explain your framing

10 / DECLARATION AND INTERNAL TRIAGE

Declaration, submission, and internal triage

Review the responses before submitting. Receipt does not constitute project acceptance and does not replace a proposal, contract, payment, or scheduling confirmation.

REQUESTER DECLARATION

- ☐ I confirm that the information is accurate to the best of my knowledge and that I may authorize this contact.
- ☐ I understand that the framing is preliminary and may change after evidence and access are reviewed.
- ☐ I have not included credentials, secrets, sensitive personal data, or raw datasets in this document.
- ☐ I authorize use of this information to assess, respond to, and keep a record of this request.

Full name *

Date *

Payment reference (if applicable)

Request reference

PAYMENT

Payment status is confirmed by Formless Solutions in its own system. A reference entered by the requester does not prove payment.

INTERNAL USE — FORMLESS SOLUTIONS

Confirmed framing

Reviewer / date

Triage decision

Additional sources, contacts, and conditions to request