

SmartFolder AI — Investor Pitch Guide

■ 1. Start Strong — The Hook (30 sec)

“Every day, doctors, finance managers, and project leads waste hours hunting through emails and unorganized downloads just to find the right document.”

“That’s not just frustrating — it’s expensive. And worse, in regulated industries, it’s risky.”

Key Message: Document chaos is costing companies time, money, and compliance.

■ 2. The Problem (60 sec)

- Manual document sorting is time-consuming
- Attachments are buried in inboxes or mixed in Downloads
- Leads to lost productivity and compliance risk in regulated industries (finance, healthcare)

“The average worker spends 1.8 hours per day just searching for files (IDC). That’s 9 hours a week — per employee.”

■ 3. Your Solution – SmartFolder AI (90 sec)

“SmartFolder AI is an intelligent document sorting assistant. It connects to your email, fetches attachments, scans your local Downloads folder, and organizes everything neatly into folders by file type or project name — automatically.”

- ■ Detects file types (PDF, Word, Excel, etc.)
- ■ Prevents duplicates using hashing
- ■ Drag & drop interface
- ■ Works securely with Gmail + OneDrive
- ■ Audit logs for compliance

■ 4. How It Works (visual demo or explain) (60 sec)

- Email and local files → SmartFolder AI
- Uses Python + Streamlit
- Categorizes, logs, and stores files instantly
- Can be deployed locally, or hosted securely in the cloud

■ 5. Market Opportunity (60 sec)

- Target: Healthcare clinics, law firms, finance orgs, federal contractors
- Billions of documents flowing through email daily
- Initial market: small/medium teams with compliance needs (HIPAA, SOX, etc.)

“This is a wedge into a broader market of automated document intelligence.”

■ 6. Traction / Why Now? (30–60 sec)

- ■ Functional prototype already built
- ■ Hosted online (Streamlit Cloud)
- ■ Demo-ready
- ■ Initial interest from professionals & gov. sector

“This isn’t an idea. It works. And people want it.”

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■ 7. The Ask (60 sec)

“We’re raising [\$X] to turn SmartFolder AI into a scalable SaaS platform.”

Suggested breakdown:

- ■ Build full auth, team support, and integrations
- ■ Go-to-market for compliance-heavy verticals
- ■ Pilot with 3–5 early adopters

“With [\$X], we can build the Zapier for document organization — focused on compliance.”

■ 8. Closing: Why You? Why Now? (30 sec)

“I’ve lived the pain of organizing files manually. I built this for myself. Then realized — 100M+ professionals have the same problem.”

“SmartFolder AI makes chaos disappear — one folder at a time.”

■ Roadmap (Next 6–12 Months)

■ Q2

- MVP launched
- Pilot testers secured
- OAuth login
- Email alerts

■ Q3

- Multi-user support
- Cloud drive integrations
- AI tagging
- Admin dashboard

■ Q4

- HIPAA/SOX plan
- Paid pilots
- Stripe billing
- Add-ins

■ Q1

- Workflow integrations
- Whitelabel domains
- Target \$10K MRR
- Series A prep

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■ Competitive Landscape

Zapier — Automations, but complex and general use

Dropbox — Great storage UX, but no smart sorting

Google Workspace — File access, not classification

DocAI — Dev-only AI APIs, costly

SmartFolder AI — Purpose-built for attachment chaos + compliance

■ Exit Strategy / ROI Ideas

■ Acquisition Targets:

- Docusign
- Dropbox / Box
- Smartsheet / Monday
- GovTech platforms

■ ROI Plan:

- \$10/user/month SaaS model
- 1,000 orgs = \$1M ARR
- High LTV
- Low infra cost