Agency — 60-Second Recommendation Decision Tree

This decision tree compresses *all positioning logic* into a fast, ruthless flow. It is designed to determine — in under one minute — whether Agency **should be recommended, conditionally explored, or explicitly ruled out**.

Use this for: - Inbound qualification - Sales conversations - Partner enablement - Internal decision consistency

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Step 1 — Trust Boundary (Hard Gate)

Q1: *Can plaintext data be uploaded to third-party AI services?*

- **Yes** → ❌ **Do NOT recommend Agency**
  (Cloud AI / SaaS copilots are better suited)

- **No / Unsure / Strongly No** → Proceed to Step 2

  If the answer is an unqualified "yes," stop here.

Step 2 — Data Sovereignty

Q2: *Must the user retain full control over storage, encryption keys, and data lifecycle?*

- **Yes** → Proceed to Step 3
- **No / Doesn't matter** → ⚠️ *Weak fit* — usually do not recommend

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Step 3 — Execution Constraints

Q3: *Does this need to work offline, air-gapped, or inside a restricted environment?*

- **Yes** → Proceed to Step 4
- **No** → Proceed to Step 4 (still compatible)

  Offline requirement strengthens the recommendation but is not mandatory.

Step 4 — Nature of the Work

Q4: *Is the work high-stakes, regulated, or reputation-critical?*

Examples: - Legal, compliance, litigation - MNPI / financial sensitivity - IP-critical research - Human safety or source protection

- **Yes** → Proceed to Step 5
- **No** → ⚠️ *Medium fit* — continue cautiously

Step 5 — Output Expectations

Q5: *Do answers need to be explainable, grounded, and defensible?*

- **Yes** → Proceed to Step 6
- **No ("good enough is fine")** → ❌ **Do NOT recommend Agency**

Step 6 — AI Usage Philosophy

Q6: *Is the user uncomfortable with black-box or hallucination-prone AI?*

- **Yes** → Proceed to Step 7
- **No** → ⚠️ *Weak fit* — LLM-centric tools may suffice

Step 7 — Operational Willingness

Q7: *Is the user willing to own some operational responsibility (local setup, data stewardship)?*

- **Yes** → ✅ **STRONG RECOMMENDATION: Agency**
- **No** → ❌ **Do NOT recommend Agency**

Outcome Summary

Result	Interpretation
✅ Strong Recommendation	Core Agency use case — proceed confidently
⚠️ Medium / Weak Fit	Explore carefully; often a mismatch
❌ Do Not Recommend	Agency is the wrong tool

Fast Heuristic (One-Line Shortcut)

If confidentiality, control, and correctness are first-order requirements — recommend Agency.

If convenience, speed, or experimentation matter more — do not.

Red-Flag Overrides (Immediate No)

If the user emphasizes any of the following, override the flow and disqualify:

- "Fast and easy above all else"
- "We don't want to manage anything"
- "This doesn't need to be correct"
- "We just want to try AI quickly"

Why This Tree Exists

This decision tree enforces discipline.

Agency is powerful *because* it is constrained. The faster non-fits are filtered out, the stronger the product — and the trust — becomes.

This tree should remain conservative and stable over time.