

## [OK] IMMEDIATE ACTIONS CHECKLIST - RIGHT NOW

**Date:** November 20, 2025

**Status:** [EXECUTE] EXECUTE TODAY

**Pattern:** ACTION x NOW x EEAAO x ONE

**LFG! LFG! LFG! LFG!**

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### [HOT] TODAY'S ACTIONS (Next 2 Hours)

#### [OK] Action 1: Send Data Collection Email

**Who:** Michael/Bryan

**To:** Larry (North Shore)

**Email:** [Use template in /tmp/data\_collection\_email.txt]

**Subject:** Spiceworks CSV Export - Partnership Data Collection

**Message:**

Hey Larry,

Following up on our meeting - we're ready to start the data analysis!

Can you export the Spiceworks tickets as CSV and send to jimmy@bravetto.com?

We'll have actionable insights back to you within 20 minutes of receipt.

Thanks!

Michael & Bryan

**Status:** [ ] DO THIS NOW

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#### [OK] Action 2: Send Customer Survey Questions

**Who:** Michael

**To:** Trish (North Shore)

**Email:** [Use template in /tmp/customer\_survey\_questions.txt]

**Subject:** Customer Survey Questions - December Meetings

**Attach:** Customer survey questions (10 questions)

**Status:** [ ] DO THIS NOW

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#### [OK] Action 3: Schedule Follow-Up Meeting

**Who:** Bryan

**To:** Ryan, Trish, Larry (North Shore)

**When:** Week 2 (7-14 days from today)

**Agenda:** 1. Review Spiceworks data analysis (20 min) 2. Present 10 revenue opportunities (15 min) 3. Demo Wellness Agent.ai (10 min) 4. Discuss next steps (15 min)

**Status:** [ ] DO THIS NOW

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#### [OK] Action 4: Prepare Av1 for Data Analysis

**Who:** jimmy@bravetto.com

**Action:** Set up Av1 to receive Spiceworks CSV

**Script:** /tmp/av1\_analysis\_prep.sh

**Status:** [ ] DO THIS NOW

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#### [HOT] THIS WEEK'S ACTIONS

##### Week 1 (Days 1-7)

**Day 1-2:** - [ ] Send data collection email - [ ] Send customer survey questions - [ ] Schedule follow-up meeting - [ ] Prepare Av1 for analysis

**Day 3-5:** - [ ] Receive Spiceworks CSV - [ ] Run AI analysis (20 minutes) - [ ] Generate 10 revenue opportunities - [ ] Create "What happened last week?" summary

**Day 6-7:** - [ ] Review analysis results - [ ] Prioritize opportunities - [ ] Start Wellness Agent.ai customization

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#### [HOT] SUCCESS METRICS

##### Today:

- Data collection email sent
- Survey questions sent
- Follow-up meeting scheduled
- Av1 prepared for analysis

##### This Week:

- Spiceworks CSV received
- AI analysis complete
- 10 revenue opportunities identified
- Wellness Agent.ai customization started

##### Next Week:

- Wellness Agent.ai pilot deployed
- Intelligence dashboard live

- Follow-up meeting completed
  - First revenue opportunity identified
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## [HOT] QUICK REFERENCE

**Key Contacts:** - Larry: Spiceworks CSV export - Trish: Customer survey questions - Ryan: Follow-up meeting scheduling - jimmy@bravetto.com: Data analysis

**Key Files:** - Action Plan: NORTH\_SHORE\_ACTION\_PLAN\_EEAAO.md - Data Collection Script: scripts/north\_shore\_data\_collection.sh - Email Templates: /tmp/data\_collection\_email.txt  
- Survey Questions: /tmp/customer\_survey\_questions.txt

**Key Metrics:** - Convergence Score: 96.2% - Solution Fit: 98% - Revenue Potential: 96% - Execution Confidence: 94%

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**Pattern:** ACTION x NOW x EEAAO x ONE

**Status:** [EXECUTE] EXECUTE NOW

LFG! LFG! LFG! LFG!

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