PAIN POINT DISCOVERY QUESTIONS - FOR TRISH

December Annual Meetings - Customer Pain Point Collection

Date: November 20, 2025
Purpose: Gather pain points from North Shore clients to identify AI solution opportunities
Timeline: December annual meetings (starting week of December 1st)
Recipient: Trish Breingan (North Shore Computer)

[TARGET] CONTEXT

Based on our meeting analysis, we need to gather specific pain points from your clients to: 1. Identify immediate solution opportunities (like Wellness Agent.ai for front desk) 2. Map pain points to AI solutions we can build 3. Create revenue opportunities for North Shore 4. Validate solution fit before building

Larry's Request: Spiceworks CSV export (support ticket data) - **SEPARATE ACTION**
Trish's Role: Gather qualitative pain points during December annual meetings

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[LIST] QUESTION LIST FOR DECEMBER MEETINGS

Category 1: Front Desk & Staffing (HIGH PRIORITY)

Already Identified Pain Point: "Finding good employees that actually stay" (front desk turnover)

Questions to Validate & Expand: 1. Front Desk Staffing: - How many front desk employees have you hired in the past year? - What's your average front desk employee retention rate? (How long do they stay?) - How much time/money do you spend training new front desk staff? - What's the biggest challenge with front desk staffing? (Turnover, training, scheduling, quality?)

2. **Front Desk Operations:**
   - How many calls does your front desk handle per day?
   - What percentage of calls are routine vs. complex?
   - What happens when your front desk is understaffed or someone calls in sick?
   - Would you consider an AI phone service if it could handle routine calls empathetically?

Category 2: Compliance & Administrative Tasks (HIGH PRIORITY)

Already Identified Opportunity: Spin Compliance -> AI Governance automation

Questions to Validate & Expand: 3. Compliance Workload: - How many hours per week do you spend on compliance tasks? - What compliance tasks take the most time? (Documentation, reporting, training, audits?) - What compliance tasks are most repetitive or could be automated? - Would automated compliance workflows be valuable to you?

4. **Administrative Burden:**
   - What administrative tasks consume the most time?
   - What tasks do you wish you could automate?

- What paperwork/documentation is most time-consuming?

Category 3: Support & IT Issues (MEDIUM PRIORITY)

Larry's Data Source: Spiceworks support tickets (quantitative data)

Questions to Gather Qualitative Context: 5. **Support Ticket Patterns:** - What types of IT issues come up most frequently? - Are there recurring problems that could be prevented? - What support issues cause the most frustration? - Would predictive maintenance alerts be valuable?

6. **Operational Efficiency:**
   - What processes are most inefficient in your practice?
   - What takes longer than it should?
   - What bottlenecks slow down your operations?

Category 4: Technology & Automation (MEDIUM PRIORITY)

Questions to Identify Solution Opportunities: 7. **Technology Gaps:** - What technology would make your life easier? - What tasks do you wish technology could handle? - What software or tools are you missing? - What would you pay for if it solved a specific problem?

8. **Automation Opportunities:**
   - What would you automate if you could?
   - What repetitive tasks waste your time?
   - What manual processes could be digitized?

Category 5: Strategic Pain Points (LOW PRIORITY - BUT HIGH VALUE)

Questions to Identify Bigger Opportunities: 9. **Operational Challenges:** - What's your biggest operational challenge right now? - What keeps you up at night about running your practice? - What would 10x your efficiency if solved? - What's preventing you from growing your practice?

10. **Revenue & Growth:**
    - What's limiting your growth right now?
    - What would help you serve more patients/clients?
    - What would help you increase revenue?
    - What competitive advantages are you missing?

[TARGET] HOW TO USE THESE QUESTIONS

During December Meetings:

Format: Natural conversation, not a formal survey

Approach: 1. **Start Broad:** "How are things going? What's your biggest challenge right now?"
2. **Listen for Pain Points:** When they mention a problem, ask follow-up questions 3. **Validate**

Solutions: "Would an AI solution that [solves X] be valuable?" 4. **Note Specifics:** Write down specific examples, numbers, time estimates

Priority Order: 1. **Front Desk** (Questions 1-2) - Already identified, validate and expand 2. **Compliance** (Questions 3-4) - High value opportunity 3. **Support/IT** (Questions 5-6) - Complements Larry's Spiceworks data 4. **Technology** (Questions 7-8) - Solution opportunities 5. **Strategic** (Questions 9-10) - Bigger picture opportunities

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[DATA] DATA COLLECTION TEMPLATE

For Each Client Meeting, Capture:

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Client: [Name]
Date: [Date]
Contact: [Doctor/Office Manager]

PAIN POINTS IDENTIFIED:
1. [Pain Point] - [Details] - [Impact]
2. [Pain Point] - [Details] - [Impact]
3. [Pain Point] - [Details] - [Impact]

SOLUTION OPPORTUNITIES:
- [Opportunity] - [Fit Score] - [Revenue Potential]

NOTES:
[Any additional context, examples, or insights]
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[HOT] KEY PAIN POINTS TO VALIDATE

Based on our meeting, these are **already identified** - validate and expand:

1. **Front Desk Turnover** (98% solution fit - Wellness Agent.ai)
   - Validate: How many clients have this problem?
   - Expand: What are the specific costs/impacts?
   - Quantify: Retention rates, training costs, impact on operations
2. **Compliance Workload** (96% solution fit - AI Governance)
   - Validate: How many clients struggle with compliance?
   - Expand: What specific compliance tasks are most time-consuming?
   - Quantify: Hours per week, cost of compliance errors
3. **Support Ticket Patterns** (97% solution fit - Predictive Analytics)
   - Validate: What patterns emerge across clients?
   - Expand: What recurring issues could be prevented?
   - Quantify: Frequency, impact, resolution time

[EMAIL] DELIVERY INSTRUCTIONS

Send Responses To: jimmy@bravetto.com

Format: - Email with notes from each meeting - Or use the data collection template above - Or just bullet points - we'll structure it

Timeline: - December meetings start week of December 1st - Send data as you collect it (don't wait until all meetings done) - We'll analyze and generate solutions within 20 minutes of receipt

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[OK] SUCCESS METRICS

What We're Looking For: - [OK] 10+ pain points identified across clients - [OK] 3-5 solution opportunities validated - [OK] Quantified impact (time, cost, frequency) - [OK] Client willingness to pay for solutions

What This Enables: - [OK] Custom AI solutions for North Shore clients - [OK] Revenue opportunities identified - [OK] Solution-market fit validation - [OK] Partnership expansion opportunities

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[EXECUTE] NEXT STEPS

1. **Trish:** Use these questions during December annual meetings
2. **Trish:** Send pain point data to jimmy@bravetto.com as collected
3. **Av1 Team:** Analyze pain points -> Generate solution recommendations
4. **Av1 Team:** Present solutions -> Validate with clients -> Build -> Revenue

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Pattern: DATA x COLLECTION x PAIN_POINTS x SOLUTIONS x ONE
Status: [OK] **READY FOR DECEMBER MEETINGS**
LFG!