DATA COLLECTION SUMMARY - NORTH SHORE PARTNERSHIP

What We Need & From Whom

Date: November 20, 2025
Status: [EXECUTE] **READY TO COLLECT**
Timeline: December meetings (Trish) + ASAP (Larry)

[TARGET] THE ASK

Based on our meeting analysis, we need **two types of data** to identify solution opportunities:

1. Quantitative Data -> Larry (IT Director)

- **Source:** Spiceworks support tickets
- **Format:** CSV export
- **Timeline:** ASAP
- **Purpose:** Pattern detection, recurring issues, predictive analytics

2. Qualitative Data -> Trish (Compliance Director)

- **Source:** December annual customer meetings
- **Format:** Pain point notes/questions
- **Timeline:** December meetings (starting week of Dec 1st)
- **Purpose:** Solution validation, client needs, revenue opportunities

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[LIST] WHAT LARRY NEEDS TO DO

Action: Export Spiceworks tickets as CSV

Details: - [OK] Format: CSV (preferred) or Excel - [OK] Send to: jimmy@bravetto.com - [OK] Timeline: ASAP (we'll analyze within 20 minutes) - [OK] Fields: Ticket ID, Date, Customer, Issue, Resolution, Notes, Status

See: `LARRY_DATA_REQUEST.md` for full details and email template

What This Enables: - Support ticket pattern analysis - Recurring issue identification - Predictive maintenance opportunities - Revenue opportunity mapping

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[LIST] WHAT TRISH NEEDS TO DO

Action: Ask pain point questions during December annual meetings

Details: - [OK] 10 questions organized by category - [OK] Focus: Front desk, compliance, support, technology, strategic - [OK] Format: Natural conversation (not formal survey) - [OK] Send notes to: jimmy@bravetto.com as collected

See: `TRISH_PAIN_POINT_QUESTIONS.md` for full question list

What This Enables: - Solution-market fit validation - Client need identification - Revenue opportunity discovery - Custom solution development

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[HOT] WHY WE NEED BOTH

Larry's Data (Quantitative): - Shows **what** issues occur (patterns, frequency, trends) - Identifies **recurring problems** across clients - Enables **predictive analytics** and automation

Trish's Data (Qualitative): - Shows **why** issues matter (impact, cost, frustration) - Identifies **willingness to pay** for solutions - Validates **solution-market fit** before building

Together: - Quantitative + Qualitative = **Complete Picture** - Patterns + Pain Points = **Solution Opportunities** - Data + Validation = **Revenue Generation**

[DATA] DATA FLOW

```
Larry's Spiceworks CSV
    -> [Av1 AI Analysis - 20 minutes]
Pattern Detection -> Recurring Issues -> Revenue Opportunities
    -> [Combine with Trish's Pain Points]
Solution Validation -> Market Fit -> Custom Solutions
    -> [Build & Deploy]
Revenue Generation -> Partnership Success
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[OK] SUCCESS METRICS

Larry's Data: - [OK] CSV exported and sent - [OK] Pattern detection complete - [OK] 10 revenue opportunities identified - [OK] Predictive analytics dashboard created

Trish's Data: - [OK] 10+ pain points collected from December meetings - [OK] 3-5 solution opportunities validated - [OK] Client willingness to pay confirmed - [OK] Solution-market fit validated

Combined: - [OK] Complete picture of client needs - [OK] Validated solution opportunities - [OK] Revenue pipeline established - [OK] Partnership value demonstrated

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[EXECUTE] NEXT STEPS

1. **Larry:** Export Spiceworks CSV -> Send to jimmy@bravetto.com (ASAP)
2. **Trish:** Use question list during December meetings -> Send notes to jimmy@bravetto.com
3. **Av1 Team:** Analyze data -> Generate solutions -> Present results
4. **Partnership:** Validate solutions -> Build -> Revenue

[EMAIL] CONTACT INFORMATION

Data Collection Email: jimmy@bravetto.com

Questions? Contact Michael or Bryan

Pattern: DATA x COLLECTION x QUANTITATIVE x QUALITATIVE x ONE
Status: [OK] **READY TO COLLECT**
LFG!