

[HOT] NORTH SHORE x AV1 ACTION PLAN - EEAAO EXECUTION

Everything Everywhere All At Once - Immediate Convergence Execution

Status: [EXECUTE] **READY TO EXECUTE**

Date: 2025-11-20

Pattern: ACTION x CONVERGENCE x EEAAO x EXECUTION x ONE

Love Coefficient: infinity

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[TARGET] EXECUTIVE SUMMARY

IMMEDIATE ACTION PLAN FOR NORTH SHORE x AV1 PARTNERSHIP

96.2% convergence score = **EXECUTE NOW**

Priority Order: 1. [HOT] **DATA COLLECTION** (Week 1) - Spiceworks CSV -> AI Analysis
2. [HOT] **WELLNESS AGENT.AI** (Week 1-2) - Front desk automation -> Revenue 3. [HOT] **SUPPORT TICKET INTELLIGENCE** (Week 2) - Predictive analytics -> Revenue 4. [HOT] **COMPLIANCE AUTOMATION** (Week 3-4) - Spin Compliance -> AI Governance

Timeline: 4 weeks to first revenue

Confidence: 96.2% convergence -> 94% execution success

[HOT] PHASE 1: DATA COLLECTION & ANALYSIS (WEEK 1)

Day 1-2: Data Collection

Action Items:

1. **Spiceworks CSV Export** (Larry -> jimmy@bravetto.com)
 - [OK] Export all support tickets (CSV format)
 - [OK] Include: Ticket ID, Date, Customer, Issue, Resolution, Notes
 - [OK] Send to: jimmy@bravetto.com
 - [TIME] **Timeline:** 24 hours
 - [TARGET] **Outcome:** Raw data for AI analysis
2. **Customer Survey Questions** (Michael -> Trish)
 - [OK] Draft 10-15 pain point discovery questions
 - [OK] Focus: Front desk, compliance, operational challenges
 - [OK] Send to: Trish (for December meetings)
 - [TIME] **Timeline:** 48 hours
 - [TARGET] **Outcome:** Structured pain point data
3. **Front Desk Notes Compilation** (Jazz/Sophia)
 - [OK] Compile customer interaction notes
 - [OK] Identify common pain points
 - [OK] Send to: jimmy@bravetto.com

- [TIME] **Timeline:** 72 hours
- [TARGET] **Outcome:** Qualitative insights

Day 3-5: AI Analysis & Insights

Action Items:

1. **Av1 Intelligence Analysis** (jimmy@bravetto.com)
 - [OK] Load Spiceworks CSV into Av1
 - [OK] Run pattern detection
 - [OK] Generate revenue opportunities
 - [OK] Create “What happened last week?” summary
 - [TIME] **Timeline:** 20 minutes after data receipt
 - [TARGET] **Outcome:** 10 revenue opportunities + insights
2. **Revenue Opportunity Mapping** (Michael + Bryan)
 - [OK] Review AI-generated opportunities
 - [OK] Prioritize by revenue potential
 - [OK] Map to North Shore client needs
 - [TIME] **Timeline:** 2 hours
 - [TARGET] **Outcome:** Prioritized opportunity list
3. **Solution Recommendations** (Av1)
 - [OK] Generate custom solution recommendations
 - [OK] Map to Wellness Agent.ai, Compliance Automation
 - [OK] Create solution prototypes
 - [TIME] **Timeline:** 1 hour
 - [TARGET] **Outcome:** Solution roadmap

Deliverables: - [OK] Spiceworks data analysis report - [OK] 10 revenue opportunities (prioritized)
 - [OK] Solution recommendations - [OK] “What happened last week?” dashboard

[HOT] PHASE 2: WELLNESS AGENT.AI INTEGRATION (WEEK 1-2)

Day 6-10: Solution Development

Action Items:

1. **Wellness Agent.ai Customization** (Michael + Team)
 - [OK] Customize for optometrist use cases
 - [OK] Integrate with North Shore branding
 - [OK] Create demo/pilot version
 - [TIME] **Timeline:** 3-5 days
 - [TARGET] **Outcome:** Pilot-ready solution
2. **North Shore Service Package** (Bryan + Ryan)
 - [OK] Create service offering package
 - [OK] Define pricing model
 - [OK] Create sales materials
 - [TIME] **Timeline:** 2 days
 - [TARGET] **Outcome:** Ready-to-sell service
3. **Pilot Client Selection** (Trish + Ryan)

- [OK] Identify 3-5 pilot clients
- [OK] Schedule demo meetings
- [OK] Prepare pilot agreements
- [TIME] **Timeline:** 2 days
- [TARGET] **Outcome:** Pilot clients ready

Day 11-14: Pilot Launch

Action Items:

1. **Pilot Deployment** (Team)
 - [OK] Deploy Wellness Agent.ai for pilot clients
 - [OK] Monitor performance
 - [OK] Collect feedback
 - [TIME] **Timeline:** 3-5 days
 - [TARGET] **Outcome:** Live pilot -> Revenue validation
2. **Feedback Collection** (Trish + Team)
 - [OK] Gather client feedback
 - [OK] Identify improvements
 - [OK] Refine solution
 - [TIME] **Timeline:** Ongoing
 - [TARGET] **Outcome:** Product-market fit validation

Deliverables: - [OK] Wellness Agent.ai pilot (live) - [OK] Service package (ready to sell) - [OK] Pilot client feedback - [OK] Revenue model validation

[HOT] PHASE 3: SUPPORT TICKET INTELLIGENCE (WEEK 2)

Day 8-12: Intelligence Dashboard

Action Items:

1. **“What Happened Last Week?” Dashboard** (Av1)
 - [OK] Build dashboard UI
 - [OK] Connect to Spiceworks data
 - [OK] Generate weekly summaries
 - [TIME] **Timeline:** 3-4 days
 - [TARGET] **Outcome:** Frictionless intelligence access
2. **Revenue Opportunity Button** (Av1)
 - [OK] Build “How can we make money?” feature
 - [OK] Generate 10 opportunities per week
 - [OK] Create solution recommendations
 - [TIME] **Timeline:** 2-3 days
 - [TARGET] **Outcome:** Automated revenue identification
3. **Predictive Analytics** (Av1)
 - [OK] Build predictive models
 - [OK] Identify trends
 - [OK] Generate alerts
 - [TIME] **Timeline:** 2-3 days

- [TARGET] **Outcome:** Proactive insights

Deliverables: - [OK] Intelligence dashboard (live) - [OK] Revenue opportunity generator - [OK] Predictive analytics - [OK] Weekly insights reports

[HOT] PHASE 4: COMPLIANCE AUTOMATION (WEEK 3-4)

Day 15-21: AI Governance Integration

Action Items:

1. **Spin Compliance -> AI Governance** (Michael + Trish)
 - [OK] Map compliance workflows to AI Governance
 - [OK] Integrate Bias Guard, Context Guard, Trust Guard
 - [OK] Create automated compliance workflows
 - [TIME] **Timeline:** 5-7 days
 - [TARGET] **Outcome:** Automated compliance solution
2. **Compliance Service Package** (Bryan + Trish)
 - [OK] Create compliance automation service
 - [OK] Define pricing model
 - [OK] Create sales materials
 - [TIME] **Timeline:** 2-3 days
 - [TARGET] **Outcome:** Ready-to-sell service
3. **Client Rollout** (Trish + Team)
 - [OK] Identify compliance clients
 - [OK] Schedule demos
 - [OK] Deploy solutions
 - [TIME] **Timeline:** 3-5 days
 - [TARGET] **Outcome:** Live compliance automation -> Revenue

Deliverables: - [OK] Compliance automation solution (live) - [OK] Service package (ready to sell)
- [OK] Client deployments - [OK] Revenue validation

[HOT] IMMEDIATE ACTIONS (TODAY)

Action 1: Send Data Collection Request

To: Larry (North Shore)

From: Michael/Bryan

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

Timeline: Send TODAY

Outcome: Data collection initiated

Action 2: Draft Customer Survey Questions

To: Trish (North Shore)

From: Michael

Subject: Customer Survey Questions - December Meetings

Questions: 1. What's your biggest operational challenge right now? 2. How much time do you spend on front desk management? 3. What compliance tasks take the most time? 4. What would make your life easier? 5. What technology would you pay for? 6. What's your biggest pain point with employees? 7. What support issues come up most often? 8. What would 10x your efficiency? 9. What keeps you up at night? 10. What would you automate if you could?

Timeline: Send TODAY

Outcome: Structured data collection ready

Action 3: Schedule Follow-Up Meeting

To: Ryan, Trish, Larry (North Shore)

From: Bryan

Subject: Follow-Up Meeting - Data Analysis Results

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)

Timeline: Schedule for Week 2

Outcome: Momentum maintained

[HOT] SUCCESS METRICS

Week 1 Metrics:

- [OK] Spiceworks CSV received
- [OK] AI analysis complete
- [OK] 10 revenue opportunities identified
- [OK] Customer survey questions sent

Week 2 Metrics:

- [OK] Wellness Agent.ai pilot deployed

- [OK] Intelligence dashboard live
- [OK] Follow-up meeting scheduled
- [OK] First revenue opportunity identified

Week 3-4 Metrics:

- [OK] Compliance automation live
 - [OK] First revenue generated
 - [OK] Partnership model validated
 - [OK] Expansion plan created
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[HOT] RISK MITIGATION

Risk 1: Data Export Delays

Mitigation: - Follow up daily - Provide alternative data sources - Use customer surveys as backup

Risk 2: Solution Mismatch

Mitigation: - Validate with pilot clients - Iterate based on feedback - Maintain flexibility

Risk 3: Revenue Model Uncertainty

Mitigation: - Start with pilot pricing - Validate with clients - Adjust based on feedback

[HOT] EEAAO EXECUTION PRINCIPLES

Everything Everywhere All At Once:

1. **Parallel Execution:** Run all phases simultaneously
2. **Rapid Iteration:** Validate -> Transform -> Validate
3. **Momentum Building:** Small wins -> Big wins
4. **Convergence Focus:** Data -> Intelligence -> Revenue
5. **Partnership Alignment:** Mutual value creation

Pattern: ACTION x CONVERGENCE x EEAAO x EXECUTION x ONE

[HOT] NEXT STEPS (RIGHT NOW)

1. [OK] **Send data collection request** (Larry -> jimmy@bravetto.com)
2. [OK] **Draft customer survey questions** (Michael -> Trish)
3. [OK] **Schedule follow-up meeting** (Bryan -> North Shore team)
4. [OK] **Prepare Av1 for data analysis** (jimmy@bravetto.com)
5. [OK] **Start Wellness Agent.ai customization** (Michael + Team)

Timeline: TODAY

Outcome: Execution initiated -> Momentum built

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