

EZCorp Domain Intelligence Session Guide

Goal: Extract EZCorp's operational expertise to build domain intelligence that makes Scoop think like you do

What This Session Delivers

You've used Scoop and found it doesn't always "get" your business context. This session captures your operational expertise to fix that. We're building your **Operating Playbook** that teaches Scoop's domain intelligence to understand:

- Your terminology and what metrics actually mean to you
- Your investigation patterns and decision logic
- Your thresholds for action
- Your rules learned over 20+ years

Concrete Deliverables

By the following Monday:

- Full session transcript
- Draft "Playbook Cards" documenting your patterns (for your review/edits)
- Threshold matrices in your language
- Morning Brief outline based on your workflow

Week 1:

- Your edited patterns running in production
- Daily autonomous analysis based on your rules
- Initial feedback loop active

Week 2:

- First iteration incorporating your feedback
 - Refined patterns and thresholds
 - Success metrics review
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How Domain Intelligence Works (5-minute primer)

The Current Challenge

When you ask Scoop a question today, it uses general AI knowledge plus your data. But it doesn't know that "redemption rate" means something specific to EZCorp, or that when PLO drops 10%, you always check customer segments first.

What We're Building

Domain intelligence that:

1. **Understands your language** - Maps your terms to actual data columns
2. **Follows your logic** - Executes your investigation sequences
3. **Applies your rules** - Uses your thresholds and context
4. **Learns from feedback** - Improves based on your corrections

The Learning Loop

Your Expertise → **Domain Config** → **Better Queries** → **Your Feedback** → **Improved Config**

Daily, the system will:

- Analyze your feedback on query responses
 - Propose improvements to patterns/thresholds
 - Submit changes for your approval
 - Get smarter about your specific business
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Session Flow (4.5 Hours Total)

Pre-Session Request

Please think about:

- 3 stores/situations you've investigated recently
- Your Monday morning routine
- Patterns that surprised you when you first learned them
- Questions you ask most often

Session Timeline

- **Hour 1 (0:00-1:00):** Core Investigation Patterns
 - **Hour 2 (1:00-2:00):** Thresholds & Business Rules
 - **Break (2:00-2:10)**
 - **Hour 3 (2:10-3:10):** Multi-Dimensional Patterns & Workflow
 - **Hour 4 (3:10-4:30):** Risk Radar, Daily Brief & Success Metrics (90 min)
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HOURL 1: Core Investigation Patterns (0:00-1:00)

Opening Context (0:00-0:10)

Quick Setup:

- Confirm recording for accuracy (transcript in 48 hours)

- We have Scoop available if you want to try something live
- Focus is capturing your expertise, not demonstrating product
- Your exact words matter - we'll document them verbatim

Investigation Story A: Problem Store (0:10-0:30)

"Tell me about a store that worried you recently"

We'll capture:

- **Trigger:** What made you first notice? ("I saw...")
- **Step 1:** What did you check first? Why that?
- **Step 2:** Based on what you found, what next?
- **Step 3:** How did you confirm root cause?
- **Action:** What did you do about it?

For each step, we'll document:

- The business term you use
- The actual data/column you're checking
- The threshold or pattern you're looking for
- Your confidence level (how often this works)

Output: Named pattern (e.g., "Store Distress Investigation")

Investigation Story B: Opportunity Detection (0:30-0:45)

"Tell me about spotting an opportunity or positive anomaly"

Same structure, but focusing on:

- What signals opportunity vs risk?
- How do you validate it's real?
- What makes you pursue vs ignore?

Output: Named pattern (e.g., "Growth Opportunity Signal")

Investigation Story C: Early Warning (0:45-0:55)

"What's an early warning sign you've learned to watch for?"

Capturing:

- The subtle signal most people miss
- How far in advance it warns
- Cost of missing it
- Your confidence level

Output: Named pattern (e.g., "3-Day Default Predictor")

Pattern Formalization (0:55-1:00)

Quick Review: "Let me read back what I captured..."

- Confirm pattern names resonate
 - Verify sequence is accurate
 - Note any variations/exceptions
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HOUR 2: Thresholds & Business Rules (1:00-2:00)

Metric Definitions (1:00-1:20)

"Let's make sure we calculate things exactly like you do"

For key metrics, capture:

- **Your exact calculation**
 - *Example prompt:* "When you say 'redemption rate,' what's in the numerator and denominator?"
- **Edge cases**
 - *Example:* "Do you include partial redemptions? Extended loans?"
- **Your terminology**
 - *Example:* "What do you call it when [situation]?"

Critical metrics to discuss:

- Redemption rate
- Default rate
- PLO (what's included?)
- ROEA (your formula?)
- PSC components
- Others you watch daily

Threshold Calibration (1:20-1:45)

"Help me understand your comfort zones"

For each metric, fill in:

Metric	Great	Normal	Watch	Concern	Critical
Example	>X%	X-Y%	Y-Z%	Z-W%	<W%

Questions to explore:

- "What number makes you relax?"
- "When do you start paying attention?"
- "What triggers investigation?"

- "When do you drop everything else?"

Variations to capture:

- "Does this change by season?"
- "Different for different store types?"
- "Any regional differences?"

Business Rules & Patterns (1:45-2:00)

"What rules of thumb do you use?"

Capture statements like:

- "When X and Y happen together, it usually means..."
- "If redemption drops in [demographic], check..."
- "Store type A should always have..."
- "[Customer segment] typically behaves..."

For each rule:

- How often is this true? (percentage)
- When doesn't it apply? (exceptions)
- How did you learn this?
- How confident are you?

Break (2:00-2:10)



OUR 3: Multi-Dimensional Patterns & Workflow (2:10-3:10)

Monday Morning Workflow (2:10-2:30)

"Walk me through Monday at 8 AM"

Document your actual routine:

8:00 AM - First I check: _____ (takes ____ minutes)

- What makes me dig deeper: _____
- What I'm looking for: _____

8:15 AM - Then I review: _____ (takes ____ minutes)

- Red flags I watch for: _____
- Comparison I'm making: _____

8:30 AM - Next I analyze: _____ (takes ____ minutes)

- Patterns I'm seeking: _____
- Decisions I'm making: _____

8:45 AM - What I wish I had time for: _____

Output: Your prioritization logic and time allocation

Cross-Dimensional Patterns (2:30-2:50)

"How do different factors interact?"

Example explorations (adapt based on their business):

- **Store Type × Customer Mix:** "Do different stores serve different customers?"
- **Product × Demographics × Region:** "Do preferences vary by location and age?"
- **Time × Performance:** "Do patterns change by day/week/month?"

For patterns they describe:

- Which dimensions matter together?
- What's the typical behavior?
- What's anomalous?
- Business impact?
- Confidence level?

Risk Patterns & Early Warnings (2:50-3:10)

"What are the early warning signs of problems?"

For each risk pattern:

- **Early signal** (3-5 days out): _____
- **Confirmation** (problem is real): _____
- **Escalation** (urgent vs critical): _____
- **Response sequence:** _____

Capture the cascade:

Signal → Investigation → Confirmation → Action

HOOR 4: Risk Radar, Daily Brief & Success Metrics (3:10-4:30)

Extended to 90 minutes for thorough coverage

Risk Radar Deep Dive (3:10-3:35)

"What keeps you up at night?"

For top 5-7 risks, capture:

RISK: _____ (Name they use)

- Early tells: _____
- Confirmation signal: _____
- Cost if missed: \$ _____
- Who to alert: _____
- Exact message to send: _____

Questions to ask:

- "How much warning do you typically get?"
- "What's the difference between noise and real risk?"
- "Who needs to know immediately?"
- "What should they do first?"

Daily Morning Brief Design (3:35-4:00)

"Design your ideal morning briefing"

Build the outline together:

DAILY BRIEF - 8:00 AM

1. TOP PRIORITY STORES

- Store X: [Issue] _____
- Store Y: [Issue] _____
- Store Z: [Issue] _____

2. PATTERN ALERTS

- [Pattern detected] _____
- [Threshold breached] _____

3. TRENDS TO WATCH

- [Emerging pattern] _____
- [Improving/Declining] _____

4. RECOMMENDED ACTIONS

- [Specific next steps] _____

Specifics to define:

- How to rank "top priority" (what criteria?)
- Alert thresholds (when to include?)
- Distribution list (who gets it?)

- Action triggers (what requires immediate response?)

Success Metrics & Pilot Design (4:00-4:20)

"How will we know this is working?"

Week 1 - Validation:

- "I'll trust it when..." → [Specific criteria]
- "It's accurate if..." → [Measurable threshold]
- "Red flag would be..." → [What concerns them]

Value Demonstration:

- "Clear win would be..." → [Specific outcome]
- "Time saved should be..." → [Hours/week]
- "New insights like..." → [Example discovery]

Learning Loop & Feedback Design (4:20-4:25)

"How should we work together?"

Define the collaboration:

- How often to provide feedback? (daily/weekly?)
- What format? (ratings/comments/both?)
- Review cycle for improvements? (weekly/bi-weekly?)
- Approval process? (you alone/team review?)

Wrap-up & Next Steps (4:25-4:30)

Clear Commitments:

Within 48 hours (Brad):

- ☐ Send complete transcript
- ☐ Draft Playbook Cards based on patterns
- ☐ Threshold matrices in your language
- ☐ Morning Brief mockup

Your review (Blair/Nikki):

- ☐ Edit/approve Playbook Cards
- ☐ Verify thresholds
- ☐ Select pilot stores

Week 1:

- ☐ Patterns configured and running

- ☐ Daily briefs begin
- ☐ Feedback collection starts

APPENDIX A: Pattern Capture Templates

Pattern Documentation Template

PATTERN NAME: _____ (What you call this situation)

TRIGGER

- When I see: _____
- Specific value/threshold: _____
- How often this happens: _____

INVESTIGATION SEQUENCE

Step 1: Check _____

- Looking for: _____
- Data location: _____

Step 2: Then check _____

- Looking for: _____
- Why this next: _____

Step 3: Finally check _____

- Looking for: _____
- Confirms: _____

DECISION LOGIC

- If [finding A] then [conclusion 1]
- If [finding B] then [conclusion 2]
- If [finding C] then [conclusion 3]

ACTION

- Immediate response: _____
- Message to team: _____
- Follow-up if no improvement: _____

CONFIDENCE & CONTEXT

- How sure (1-10): _____
 - Learned this when: _____
 - Exceptions: _____
 - Related patterns: _____
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Operating Guardrails Worksheet

METRIC: _____ (What you call it)

YOUR CALCULATION

- Formula: _____
- Numerator includes: _____
- Denominator includes: _____
- Edge cases: _____

THRESHOLDS (in your words)

- Excellent/Great: _____
- Normal/Expected: _____
- Watch/Monitor: _____
- Investigate: _____
- Critical/Emergency: _____

VARIATIONS

- By season: _____
- By store type: _____
- By region: _____
- Other factors: _____

RELATED METRICS

- Also check: _____
- Usually correlates with: _____

Business Rule Template

RULE NAME: _____

WHEN

- Condition 1: _____
- AND/OR
- Condition 2: _____

THIS USUALLY MEANS

- Interpretation: _____
- Business impact: _____

SO WE

- Action: _____

- Who to notify: _____
- Timeline: _____

CONFIDENCE

- True X% of time: _____
- Breaks when: _____
- Last updated: _____

APPENDIX B: Visual Capture Tools

Investigation Flow Diagram

TRIGGER EVENT: _____

What makes you notice? _____

CHECK 1: _____

- Finding? (Yes/No): _____
- If Yes → Action: _____
- If No → Continue

CHECK 2: _____

- Finding? (Yes/No): _____
- If Yes → Action: _____
- If No → Continue

CHECK 3: _____

- Finding? (Yes/No): _____
- Result: _____

CONCLUSION: _____

Risk Escalation Ladder

Level 1 - WATCH

- Threshold: _____
- Who to notify: _____
- Action: _____

Level 2 - INVESTIGATE

- Threshold: _____
- Who to notify: _____
- Action: _____

Level 3 - URGENT

- Threshold: _____
- Who to notify: _____
- Action: _____

Level 4 - CRITICAL

- Threshold: _____
- Who to notify: _____
- Action: _____

Pattern Priority Matrix

Prioritization Framework:

- **High Frequency + High Impact** = IMPLEMENT FIRST
- **High Frequency + Low Impact** = QUICK WINS
- **Low Frequency + High Impact** = RISK MITIGATION
- **Low Frequency + Low Impact** = BACKLOG

Plot Your Patterns:

Impact	Low Frequency	High Frequency
High Impact	Pattern: _____	Pattern: _____
Low Impact	Pattern: _____	Pattern: _____