Discovery Call Questions - Eugene Owusu

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OPENING

"Thanks for taking the time, Eugene. I've done some research on AMA Capital and your debt advisory work. I'd love to understand your day-to-day workflow so I can identify where automation could save you time."

DEAL PIPELINE (Start Here)

1. "Walk me through what happens when a new developer reaches out for financing help - from first contact to engagement letter."

2. "How are you currently tracking deals in Pipedrive? What stages do you use in your pipeline?"

3. "When you're working on multiple deals simultaneously, how do you keep track of where each one stands?"

LENDER MANAGEMENT

4. "You have relationships with banks and institutional investors - how do you track which lenders are suitable for which deals?"

5. "When you're shopping a deal to multiple lenders, how do you manage those parallel conversations?"

6. "Do you maintain a database of lender preferences - LTV limits, property types, geography?"

MEETINGS & COMMUNICATION

7. "For a typical developer consultation call, what's your prep process? What do you need to have ready?"

8. "After a client call, what happens to the notes? How do you ensure action items get done?"

9. "I see you have both Google Meet and MS Teams - is that because different clients prefer different platforms?"

10. "When you're presenting a deal to a lender, how do you prepare and follow up?"

DOCUMENTS & DUE DILIGENCE

11. "When a developer sends you their financials and project documents, where do those go? How do you organize them in Dropbox?"

12. "Do you have a standard document checklist you request from developers?"

13. "How do you package deals when presenting to lenders - do you use Gamma for the pitch decks?"

AI & RESEARCH

14. "You mentioned 3-4 ChatGPT agents - what specific tasks are they handling?"

15. "How are you using Perplexity vs ChatGPT - different purposes?"

16. "Are you using AI for any financial analysis, market research, or due diligence tasks?"

SPECIFIC TOOLS

Aircall + Fireflies: 17. "Are your Aircall recordings automatically transcribed by Fireflies? Does that sync to Pipedrive?"

18. "After Fireflies transcribes a call, what do you do with that transcript?"

Notability: 19. "What are you using Notability for? Personal notes during calls? Analysis work on iPad?"

20. "How do those notes get into deal files or the CRM currently?"

Motion: 21. "How is Motion AI helping you manage your calendar and tasks? Is it scheduling follow-ups automatically?"

PAIN POINTS (Key Questions)

22. **"Where do you find yourself copying and pasting information between systems most often?"**

23. **"What falls through the cracks? Missed follow-ups, lost documents, forgotten tasks?"**

24. **"If you could automate one thing in your workflow tomorrow, what would have the biggest impact?"**

25. "How much time per week would you estimate goes to admin work vs. actual advisory work?"

BUSINESS CONTEXT

26. "Are you working solo or do you have team members/assistants?"

27. "What's your typical deal cycle time - from engagement to closing?"

28. "Roughly how many active deals are you managing at any given time?"

CLOSING

"Based on what you've told me, I can see a few quick wins we could tackle first, plus some bigger opportunities. Let me put together some recommendations and we can discuss next steps."

NOTES SECTION

Key Pain Points Identified:

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Quick Wins:

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Bigger Opportunities:

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Follow-up Items:

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