



## *Consultation Topics*

We highly value your time and strive to make our services as effortless as possible. In light of this, we've compiled a list of topics below to maximize the productivity of our conversation. Please note that this introductory meeting is to better understand your situation and see if we're the right fit.

1. At a high level, **what do you (or your team) do?** How many people?
2. What are the **key hurdles or inefficiencies** you or your team face today that you're hoping to solve with AI? Consider any repetitive tasks that you do many times a week. Here's a brief list to help guide your brainstorming:
  - a. Time-consuming customer support
  - b. Writing or reworking client communication
  - c. Scheduling and calendar management
  - d. Creating standard operating procedures (SOPs)
  - e. Generating content (e.g., slide decks, text, images, videos)
  - f. Workflows (e.g., collect data, analyze, create report, upload)
  - g. Summarizing documents or extracting key data
  - h. Taking meeting notes and creating summaries
  - i. Managing leads (e.g., from an input form)
3. **How often** do these issues occur and **how much resources** do they use?
4. What is **your level of familiarity** with AI tools or solutions? Have you researched or explored any options on your own?
5. Would there be **any specific compliance, security, or other considerations** we should be aware of about your particular industry?
6. What might be your **AI budget** for initial setup and then the following monthly recurring costs for tool subscriptions and/or maintenance?
7. What **timeline** are you hoping to achieve for this project?
8. What is your **dream outcome**?

