

The client conversation

The conversation is the whole job. Ambrose builds from what gets said, so the deeper the meeting goes, the better the build. Keep this next to you in the room.

1 Before you start

- ☐ Record on two devices, in case one fails. Pocket or Plaud in person; Wispr Flow as the digital option; Grain works for video calls.
- ☐ Tell the client you're recording, and why: so nothing gets lost. Some states require everyone's consent, so always ask.
- ☐ Block a full hour. Rushed meetings make shallow builds.

3 Go deep on each one

- ☐ "Walk me through the last time that happened."
- ☐ Who's involved? What tools or spreadsheets? How often, and how long does it take?
- ☐ "What happens when it goes wrong?"
- ☐ Use their words, not yours. Specifics are what Ambrose builds from.

5 Get the practical details

- ☐ Who will use it, and how often?
- ☐ What goes in, and what should come out?
- ☐ What software or data do they already have?
- ☐ "How will you know it's working?"

2 Open with their pain

- ☐ "What do you hate doing?"
- ☐ "What eats up the most time in your week?"
- ☐ "Where are things messy, or where do they fall through the cracks?"

4 Push for the dream scenario

- ☐ "If there were no limits, what would this look like?"
- ☐ "If you had a perfect assistant who only did this, what would they do?"
- ☐ Stuck? Offer a spark: a report that builds itself, a dashboard that explains itself.
- ☐ Don't promise in the room. Capture the big version; Ambrose will tell you if something can't be done.

6 Close the loop

- ☐ Read back what you heard so they can correct it. It ends up in the transcript.
- ☐ Agree on the first thing to build.
- ☐ Tell them when you'll show them something.

7 Right after the meeting

- ☐ Hand Ambrose the transcript while it's fresh.
- ☐ Add anything you noticed that didn't get said out loud.