

Expertise-to-Software Opportunity Brief

Example profile: an independent advisor who repeatedly turns messy client evidence into a diagnosis and prioritized action plan.

WHAT THIS IS
A hypothesis brief—not a business case or build specification.
Assumptions remain visible until tested.

BEST PRODUCTIZATION CANDIDATE

An evidence-backed diagnostic workbench that structures client inputs, applies the advisor’s rubric, and drafts traceable findings for expert approval.

WHY THIS CANDIDATE

Repeatable outcome; variable evidence; defensible judgment.
Software can improve preparation and consistency without replacing the expertise clients buy.

1. The proprietary decision model to capture

Illustrative findings from the conversation

Evidence model
Goals, constraints, observed symptoms, stakeholder claims, operating data, and unresolved questions—each tagged by source and confidence.

Decision logic
Classify the problem, test competing explanations, score severity and controllability, then rank interventions against client capacity.

Expert exceptions
Conflicting evidence, political constraints, regulated decisions, and high-cost commitments must trigger clarification—not automated conclusions.

2. Build-ready workflow hypothesis

One complete path, with review gates

INPUT
Collect evidence
Notes, transcript, metrics, prior work.

STRUCTURE
Normalize
Map evidence to the advisor’s categories.

ANALYZE
Apply rubric
Score patterns; show source and confidence.

EXPERT GATE
Challenge
Resolve conflicts, gaps, and exceptions.

ASSEMBLE
Draft brief
Findings, options, risks, next actions.

EXPERT GATE
Approve
Own advice, commitments, and delivery.

5. Directional leverage case

Quantify with participant data before acting

Capacity
Reduce evidence handling and first-draft effort per engagement.

Consistency
Apply the full method even when inputs are incomplete or rushed.

IP capture
Make tacit rules and exceptions explicit, testable, and teachable.

Offer design
Potentially support a faster diagnostic or recurring monitoring service.

3. Application concept

Working name

Advisor Decision Workbench
An internal tool that turns unstructured discovery evidence into an auditable first draft of the advisor’s signature diagnostic.

Trace
Every material finding links to source evidence.

Challenge
Unknowns and contradictions stay visible.

Adapt
The advisor can refine rules without rewriting the system.

4. Control boundary

Protect the expertise

Software may

- Extract and organize evidence
- Apply explicit scoring rules
- Flag gaps and contradictions
- Assemble a draft deliverable

The expert must

- Interpret client context
- Resolve exceptions and trade-offs
- Approve every recommendation
- Own the client conversation

6. Recommended 30-day test

USE FIVE COMPLETED CASES

Run historical evidence through a narrow prototype and compare its reviewed output with the advisor’s actual deliverables.

RELIABILITY
≥95% of material claims trace to evidence; zero unsupported claims.

EFFICIENCY
Expert review time improves ≥30% versus the current baseline.

DECISION
Proceed only if confidence is ≥4/5 and expert control is preserved.

Critical unknowns: current effort per case, frequency, source quality, client-data constraints, and willingness to change the delivery model.