

Go To Market strategies:

As of 1/29/2026:

## **\*\* High-Value "Human-to-Human" Interventions**

In Utah, digital scale gets you the *lead*, but physical presence wins the *market*.

- **The "I-15 Billboard" Trust Anchor:**
- **2026 Strategy:** Don't buy a static board. Buy **Blip/Yesco Digital** boards in the Lehi/Silicon Slopes corridor.
- **The Hack:** Only run the ads during the 7:00–9:00 AM commute. When a GC sees your billboard, then sees your email 20 minutes later at their desk, you are no longer a "bot"—you are a "local powerhouse."
- Based on the strategy to target the **Lehi/Silicon Slopes corridor** and the specific goal of capturing high-speed I-15 traffic during the **7:00–9:00 AM commute**, here are 12 creative, high-impact phrases designed for digital billboards.
- These phrases leverage local geography (Lehi, Silicon Slopes, Point of the Mountain) and the specific "pre-permit" value proposition found in your sources.
- **Bidding permits? You're months late.**
- **We read agendas. You move dirt.**
- **Excavators: See jobs 6 months early.**
- **Stop bidding old news.**
- **Your competitor saw this agenda last month.**
- **Every Utah County site-prep bid.**
- **Beat the permit by 90 days.**
- **Spot projects before permits.**
- **See jobs months before permits.**
- **Find tomorrow's jobs today.**
- **Bid before competitors know it exists.**
- **We read agendas, you win work.**
- **Your pre-permit unfair advantage.**
- **Know where the dirt moves first.**
- **Unlock the hidden project pipeline.**
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## **#1: Warm Channels + List Building (Days 1-7 Total—Your Human Bandwidth)**

Why: Warmest closes (20-50% meetings)—builds momentum and early trials in Utah/Salt Lake counties.

Step 1 (Days 1-2, 2-4 hours): Contact HBA for speaking slot.

- Open your browser and go to [uvhba.com](http://uvhba.com) (Utah Valley chapter) or [slhba.com](http://slhba.com) (Salt Lake chapter).
- Look for the "Events" page or "Contact Us" section—find the email or phone for the president or events person.
- Send an email or make a call. Say exactly: "Hi, this is Aaron Earnest with Agenda Insider. We provide early planning agenda intel for contractors. I'd love to present a quick 'Early Edge on Rezonings' talk at your next luncheon, with a 60-second demo. Available most dates."
- If no reply by end of day 2, follow up with a second, call or second email.
- Why over-explained: Speaking slots book meetings fast—prep your laptop demo.

Step 2 (Days 3-5, 4-6 hours): Do drop-ins to 10-20 offices.

- Open Google Maps on your phone. Search "excavation companies Provo" or "general contractors Lehi" or "construction companies Orem".
- Make a list of 10-20 addresses (focus Utah/Salt Lake counties).
- Drive a route—visit 5-10 per day.
- Walk in and say: "Hi, Aaron Earnest with Agenda Insider. Quick 2-minute chat on early rezoning intel for your bids? Here's a 60-second demo on my phone." Show map teaser, hand business card, offer trial.
- Write notes in your phone (company name, who you talked to, their reaction).
- Why over-explained: Face-to-face builds trust—aim for 2-5 trials from these visits.

Step 3 (Days 6-7, 2 hours): Build Apollo list.

- Open browser and go to <https://www.apollo.io/sign-up> (Liliana's direct link—free trial starts right away).
- Fill the form with your business email and Agenda Insider details.
- Once in the dashboard, click search box. Type "Construction".
- Add filters: Location "Utah County" or "Salt Lake County", Job Titles "Owner" or "Manager" or "Project Manager", Industry "General Contractors" or "Excavation".
- Look at results—Apollo adds emails and phones automatically. Save 300-500 good ones.
- Click export button—download as CSV file to your computer.
- Why over-explained: Apollo's construction contacts are the smartest start—no extra purchases needed.

## **#2: Setup Smartlead.ai (Days 8-14 Total)**

Why: Safe, high-volume sending—best 2026 tool for deliverability in construction B2B (auto-warmup/rotation keeps us out of spam).

Step 1 (Day 8, 1 hour): Signup and pay for Smartlead.ai.

- Open browser and go to [smartlead.ai](http://smartlead.ai).

- Click "Sign Up" or "Get Started".
- Choose the \$99/mo unlimited plan (best for us).
- Fill payment details and create account.

Step 2 (Days 9-10, 1-2 hours): Buy and connect 10 domains.

- Open new tab, go to namecheap.com.
- Search for 10 lookalike domains (examples: utahagenda-insight.com, agenda-insiderutah.com—\$10-15 each, total \$150). Buy them.
- Back in Smartlead dashboard, go to "Mailboxes" or "Domains" section.
- Add each domain one by one—follow instructions to verify (copy DNS records to Namecheap settings).
- Create 10 inboxes (email accounts) on those domains.

Step 3 (Days 11-14, 30 minutes + waiting): Start auto-warmup.

- In Smartlead, go to warmup section.
- Turn on auto-warmup for all 10 inboxes.
- Watch dashboard daily—it starts slow (5-10 emails/day per inbox) and ramps up. Wait until all show green (safe, about 2 weeks total, but monitor).
- Import your Apollo CSV list into Smartlead (upload button in contacts section).
- Why over-explained: Warmup is critical—no sends until green to avoid spam issues.

### **#3: Scripts/Sequences + Landing/Demo (Days 15-21 Total)**

Why: Peer-tone emails + quick demo get replies and trials.

Step 1 (Days 15-17, 4 hours): Craft scripts.

- Open Google Docs on your computer—new document named "Utah Scripts".
- Write 3 short versions:
- For excavators: Subject line "Question on your Lehi work". Body: "Hey [First Name], Saw [Company Name] on some Lehi sites. Do you track early rezonings? Spotted this 20-acre one. 60-second demo worth it? Reply for link. Aaron"

- For GCs: Similar, change to "Provo projects" or "bidding early".
- For builders: Focus "lot acquisition edge".
- Keep each email under 100 words. End with landing page link.

Step 2 (Day 18, 1 hour): Record <60s demo.

- Go to loom.com—sign up free.
- Click record screen. Show mock dashboard—zoom map on rezoning, point to summary (doors/acres/stages/contacts). Say slowly: "Early intel before permits—filter your way. Start free trial below." Stop at 60 seconds. Save and copy share link.

Step 3 (Days 19-21, contract): Build landing page.

- Go to upwork.com—post job "Simple landing page: Embed video + Stripe trial button" (\$500-800 budget).
- Give freelancer: Headline "Utah Early Agenda Intel—Free 14-Day Trial". Put Loom video in center. Add Stripe button below for trial (14 days free, then \$99/mo).
- Why over-explained: Freelancer handles tech—page ready fast.

## **#4: Launch + Respond/Close (Days 22+ Ongoing)**

Why: Automated volume + your fast replies + ads mimic tireless team (1,000+ touches/day, 3-5% closes).

Step 1 (Days 22-24, 1 hour): Add Google Ads test (\$500/mo budget).

- Open browser, go to ads.google.com.
- Click "New Campaign"—choose "Search".
- Set location "Utah" or "Salt Lake County".
- Add keywords: "Utah construction leads", "Wasatch rezoning intel", "early project agendas Utah".
- Write ad: Headline "Early Rezoning Intel Utah". Description "Spot projects before permits—60s demo + free trial". Link to landing page.
- Set daily budget \$20-30—launch campaign.

Step 2 (Days 25+, ongoing): Launch sends and respond.

- In Smartlead dashboard, add your scripts to sequences (Email 1 teaser, wait 3 days Email 2 follow-up, both link landing).
- Start with 200 sends (safe post-warmup)—use HBA/Apollo lists.
- Check Smartlead app/phone for replies—reply within 5 minutes.
- Say: "Thanks for reply—15-minute call on your projects? Tuesday 10am or 2pm work?" Close trial or meeting.
- Jeff/n8n auto-sends welcome/onboarding for new trials.
- Weekly: Look at Smartlead and Google Ads dashboards—add more sends/ads as metrics stay good.

This path is proven and efficient—warm momentum first, safe scale second. We'll hit 25-50 trials in Utah/Salt Lake fast. Start with #1 HBA contact or Apollo signup today? Your word.

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As of: 1/24/2026, Gemini, Chat and Grok merged to create this set of steps: Aaron, we're tightening this up beautifully—almost launch-ready. Great call on simplifying: I'll strip explanations to bare essentials (what to do, why briefly, how). We'll lean hard on the stack rationale from that sharp GPT analysis: Apollo alone is "good enough" for generic outbound, but wrong for us because of regulator-grade lists (DOPL/HBA—accurate but spam-sensitive), need for bulletproof deliverability (Scrubby/Smartlead separate), modular AI orchestration

(n8n for event-driven upsells like \$100 first region + \$50 adds), and scaling without reputation risk to licensed pros (excavators/GCs/lenders/title/insurance who mark spam fast).

No full Apollo—experts converged on separated stack for a reason. We stay humanless sales (you direct, AI executes via tools/n8n, Jeff reacts on integrations/product events, Dave seconds QA/copy).

Focus sharp: We only have reliable agenda data for Utah Wasatch Front (UT counties + SLC) right now, so all early outreach teases/builds demand there ("early Wasatch intel before permits"). Clark County sequences later when Jeff's scrape ready. Start with excavators (highest pain—site prep leads 4–8 weeks early).

No hiring needed yet—this is bootstrap lean (total ~\$400–\$700/mo tools). If n8n wiring gets sticky later (e.g., Stripe upsell triggers), we could grab a one-off fractional n8n expert from Upwork (~\$1k–\$2k project, companies like "n8n.pro" or freelancers via "n8n community" slack)—but only if Jeff flags overload. For now, you own it with his reacts.

### Simplified Timeline (Start Monday Jan 26 – Bank Ready ~Feb 2)  
Personal card for small signups—reimburse from Agenda Insider account later.

#### Week 1: Lists + Tools Warmup (Jan 26–Feb 1) – Build Utah Foundation

\*\*Monday Jan 26 (Lists – 2–3 hours)\*\*

1. Pull Utah Wasatch Front lists (excavators/GCs first).

  - DOPL site: [secure.utah.gov/llv/search](http://secure.utah.gov/llv/search) – bulk request contractors (excavation/site work + general). Pay small fee if needed.

  - HBAs: [slhba.com](http://slhba.com) + [uvhba.com](http://uvhba.com) directories – search/export excavators/GCs (names, companies, phones/emails visible).

  - Goal: 500–1,000 rows in Google Sheets. Columns: Company, Name, Email/Phone (if there), Trade, County.

2. Quick Dave ping: "Spot-check 50 rows for junk?"

\*\*Tuesday Jan 27 (Domains + Smartlead – 1 hour)\*\*

1. Buy 5 burner domains (Namecheap/Google Domains, ~\$10–\$15 each): e.g., [wasatchdirtintel.com](http://wasatchdirtintel.com), [utahagendainsights.com](http://utahagendainsights.com) (never use [agendainsider.com](http://agendainsider.com) for sending—protect brand).

2. Sign up Smartlead.ai (~\$99–\$150/mo unlimited trial/plan).

3. Create Google Workspace mailboxes on burners (~\$6/mo each if required).

4. Turn on Auto-Warmup all mailboxes. Rule: Zero sends for 14 days (builds reputation safe).

\*\*Wednesday Jan 28 (Apollo Enrichment – 1–2 hours)\*\*

1. Sign up Apollo.io (Basic ~\$49–\$99/mo trial).
2. Upload Monday sheet.
3. Enrich: Auto-fill missing emails/phones (killer accuracy on licensed pros).
4. Segment: Make lists "Wasatch Excavators", "Wasatch GCs".
5. Export enriched CSV.

\*\*Thursday Jan 29 (Scrubby Clean – 1 hour)\*\*

1. Sign up Scrubby.io (starter credits ~\$50–\$100).
2. Upload Apollo CSV > verify (cuts risky/catch-alls—protects domains forever).
3. Download super-clean list (98%+ safe).

\*\*Friday Jan 30 (Sequences Draft – 1–2 hours)\*\*

1. In Smartlead: Draft 4–6 touch sequences (no send yet).
  - Hook examples: "Upcoming Wasatch subdivision agenda—site work intel early?" or "Beat competitors to pre-permit projects in [County]."
  - Offer: "Free trial: Next 4 weeks Wasatch summaries."
2. Simple teaser landing (Carrd.co or Google Site, free/quick): "Agenda Insider – Early Wasatch Project Visibility. Trial signup."
3. Dave review: Send drafts "Thoughts on these?"

\*\*Weekend Jan 31–Feb 1 (Rest + Check)\*\*

- Watch Smartlead warmup dashboard.
- Prep any questions for Jeff (e.g., "Future n8n needs for Stripe region tags").

#### Week 2: Stripe + Light Automation (Feb 2–8) – Bank Live, Test Prep

\*\*Monday Feb 2 (Stripe Setup – 1 hour)\*\*

1. Link new bank account to Stripe.
2. Create products: "\$100/mo Wasatch Front (First Region)", "\$50/mo Additional Region".
3. Test a fake sub to confirm.

\*\*Tuesday Feb 3 (n8n Ping Jeff – 30 min)\*\*

1. Message Jeff: "When ready, basic n8n instance for future: Stripe pay > tag user region > unlock Wasatch data on site."
  - (He reacts—keeps product focus: agendas scrape/summarize/deliver.)

\*\*Wednesday–Friday Feb 4–6 (Warmup Monitor + Refine)\*\*

1. Check Smartlead—mailboxes building rep.
2. Tweak sequences based on Dave feedback.
3. If warmup hits safe (~50/day), prep tiny test list (100 excavators).

\*\*Weekend Feb 7–8 (Clark Peek)\*\*

- Light: Start noting Clark sources ([nvcontractorsboard.com](http://nvcontractorsboard.com)) for later.

#### Week 3: First Sends + Iterate (Feb 9–15)

\*\*Monday Feb 9 (If Warmup Ready: Tiny Test Launch)\*\*

1. Upload 100–200 clean excavators to Smartlead.
2. Start sequence (low volume: 50–100/day).
3. Watch opens/replies—drive to teaser landing.

\*\*Rest of Week\*\*

- Daily check metrics.
- Handle replies personally (or Dave seconds).
- Goal: 10–20 interested ("When live?") > nurture for Jeff's site go-live.

#### Week 4+: Ramp + Upsell Logic (Feb 16 Onward)

- Increase volume as warmup allows (200–500/day).
- Add GCs/lenders/title when replies prove hook.
- Ping Jeff for n8n upsell flow: e.g., user views Clark teaser > auto \$50 add prompt.
- Target: 15–30 trials > half convert paid at \$100 (Wasatch) when data delivers.

Aaron, this is dead simple, protected, and demand-building while Jeff perfects Utah data delivery (expanding regions systematically). Excavators will reply fast—one early agenda tip pays the fee 10x.

Monday lists are your easiest win—knock it out. Want me to draft those first sequence emails next?

Straightforward as always—excited for your first sends.

- targeted demos emphasizing the map's "competitor watch" superpower, and partnerships with AGC/UEA for webinars.
- From 2025 SaaS trends in construction tech: AI integration drives 3-5x faster adoption (e.g., Procore's analytics grew subs 25% YoY), real-time data like our agendas disrupts bidding, and go-to-market leans on inbound content (blogs on "Early Agenda Wins") plus paid LinkedIn ads to GCs/devs. Top

growers like G2 (filter/compare tools) and Notion (community templates) scaled via freemium and user shares

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Subscriptions exploded 435% last decade, but B2C like Blue Apron (1M subs in 3 years) used personalization; B2B like Slack (265k users in year 1) leaned on freemium and bottoms-up adoption. No pure "fastest" formula, but patterns: Launch with MVP value, iterate on feedback, and scale via multi-channel (not one tactic).

Company	Launch Year	Significant Milestone	Time to Milestone	Key GTM Strategies
Slack (B2B SaaS, comms)	2013	265k active users; 10M+ DAU by 2021	1 year to 265k	Freemium (free tier hooks teams, upgrades for features); viral invites; integrations; bottoms-up (users adopt, companies follow); content on productivity.
Zoom (B2B SaaS, video)	2013	300M daily participants; \$2.65B revenue	7 years (exploded in 2020)	Freemium (easy entry, limits prompt pay); superior UX; partnerships (integrations); word-of-mouth via shares; rapid scaling via cloud infra.
Notion (B2B SaaS, productivity)	2016	30M users	7 years (1M to 30M in 4 years)	Community-led (user templates/sh

				ared); freemium; Product Hunt launches; referrals; all- in-one versatility for organic spread.
HubSpot (B2B SaaS, CRM/marketi ng)	2006	205k customers; \$2B+ revenue	17 years (steady 20- 25% YoY)	Inbound content (blogs, ebooks, academy); freemium tools; partnerships (agencies); SEO for leads; tiered pricing.
Blue Apron (B2C, meals)	2012	1M subscribers	3 years	Personalizati on (custom meals); flexible subs; influencer marketing; data-driven retention (feedback loops).
Birchbox (B2C, beauty)	2010	1M subscribers	4 years	Curated samples for trials; social UGC; referrals; niche focus on discovery.

Salesforce (B2B SaaS, CRM)	1999	\$31B revenue (93% subs)	24 years (pioneered SaaS)	Tiered pricing; ecosystem (AppExchange); customer success/upsell; add-ons; continuous innovation.
Peloton (B2C, fitness)	2013	2M+ subscribers	8 years	Hardware + sub hybrid; community/influencers; content variety; adaptations (digital-only tiers).
Company	Launch Year	Significant Milestone (2025)	Time to Milestone	Key GTM Strategies
Procore (Construction SaaS)	2002	\$1.2B ARR, 15k+ customers	23 years (accelerated post-2020)	Integrations with tools like Dodge; freemium trials; AGC partnerships; content on efficiency; AI analytics for bids.
ConstructConnect (Bidding/Planning)	2016	10k+ subs, \$500M+ revenue	9 years	Inbound SEO/ebooks on leads; targeted ads to GCs; Dodge mergers for data; user referrals;

				real-time alerts.
PlanHub (Bidding Network)	2011	5k+ active projects daily	14 years	Free basic access for subs; premium for full bids; email campaigns; construction association tie-ins; mobile app virality.
G2 (SaaS Reviews/Comparison)	2012	2M+ users, \$300M ARR	13 years	Freemium compare tools; content marketing; LinkedIn ads; user-generated reviews for organic growth.
Notion (Productivity SaaS)	2016	40M+ users	9 years	Community templates; freemium; Product Hunt launches; viral shares; integrations for bottoms-up adoption.
Mercator.ai (Construction AI)	2020	2k+ subs, 150% YoY growth	5 years	AI demos to devs/GCs; partnerships with bid sites; targeted

				outreach via Dodge lists; webinars on rezoning intel.
Downtobid (AI Bidding)	2022	1k+ users, 200% growth	3 years	AI dashboard free tier; keyword alerts; email nurtures; construction club sponsorships; rapid iterations from feedback.

Drawing from those fast-scalers in our table (Procore, ConstructConnect, etc.), I've pulled a comprehensive list of human-performed sales and marketing duties based on their real-world roles—things like prospecting, content creation, and pipeline management that humans traditionally handle. These are synthesized from job descriptions, responsibilities, and strategies across the companies, avoiding duplicates for clarity.

Then, I've remade the list with AI/software alternatives, always prioritizing fast market penetration: tools that scale instantly, personalize at volume, and iterate on data without human bottlenecks. This setup lets us launch broad, test rapidly, and expand to Tampa/Sarasota or beyond while keeping costs low and velocity high. We'll integrate these into our platform—think Jeff's AI extending to marketing automation, feeding off agenda data for hyper-targeted campaigns. Competitors like Mercator.ai are dipping into AI demos, but we'll outpace them by making every touchpoint predictive and autonomous.

## Human-Performed Sales & Marketing Duties

From the companies' roles (e.g., Procore's sales managers training teams, ConstructConnect's reps outbound prospecting, Notion's strategists optimizing processes), here's the compiled list:

- Prospecting and Lead Generation:** Identifying, contacting, and qualifying potential customers through outbound calls, emails, or inbound handling.
- Market Research and Insights Gathering:** Analyzing market trends, customer needs, and competitor activities to inform strategies.

3. **Content Creation and Management:** Researching, writing, editing, and producing marketing materials like emails, blogs, ebooks, and social posts.
4. **Sales Pipeline Management:** Tracking leads, managing CRM records, monitoring progress, and ensuring follow-ups.
5. **Relationship Building and Customer Engagement:** Building and maintaining relationships, listening to pain points, and engaging via presentations or demos.
6. **Training and Enablement:** Delivering training on products, methodologies, and tools to sales teams or partners.
7. **Go-to-Market Strategy Development:** Defining plays, messaging, campaigns, and territory mapping with cross-functional teams.
8. **Performance Coaching and Mentoring:** Leading, mentoring, and coaching sales teams to drive performance and achieve objectives.
9. **Content and Campaign Optimization:** Gathering insights to refine messaging, collateral, and strategies.
10. **Deal Closing and Negotiation:** Applying product knowledge and sales techniques to close deals and sell solutions.
11. **Brand Representation and Awareness:** Representing the brand in stores, events, or online to increase visibility and drive interest.
12. **Quarterly Reviews and Reporting:** Presenting plans, reviews, and performance reports to executives.
13. **Inbound Request Handling:** Responding to prospective customer inquiries and experimenting with outbound messaging.
14. **Sales Plays and Collateral Creation:** Developing high-impact plays, training materials, and enablement resources.
15. **Pipeline Development Programs:** Planning and executing programs for territory mapping and pipeline growth.

## **AI/Software-Replaced Duties for Fast Penetration**

Now, the forward view: We replace humans with AI-driven tools that operate 24/7, learn from data (like our agenda summaries), and scale to thousands of touches daily. This accelerates penetration by automating personalization (e.g., tailoring pitches to a GC's past bids via AI analysis) and virality (e.g., auto-referrals). Tools like Apollo (mentioned in CM history) evolve into AI-native versions; we'll integrate with Jeff's layer for construction-specific intel. Prioritizing speed: Start with low-cost SaaS, test in UT/NV, then automate expansion.

Original Human Duty	AI/Software Alternative	How It Drives Fast Penetration
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1. Prospecting and Lead Generation	AI-powered lead scoring and outbound tools (e.g., Outreach.io or Apollo with AI integrations) that auto-scrape contractor lists, send personalized emails/calls based on agenda data, and qualify via chatbots.	Scans 36k+ UT licenses overnight, prioritizes hot leads (e.g., those near rezonings), and nurtures 1,000+ prospects/week without manual effort—hitting 4% capture faster through volume.
2. Market Research and Insights Gathering	AI analytics platforms (e.g., Crayon or Similarweb AI) that monitor competitors like Mercator.ai, analyze AGC forums, and pull insights from agendas for trend predictions.	Real-time scans of development hotspots (e.g., Tampa growth) feed into campaigns, allowing instant pivots to high-activity regions for quicker market grabs.
3. Content Creation and Management	Generative AI writers (e.g., Jasper or Copy.ai) integrated with our platform to auto-generate emails, blogs on "Agenda Wins for GCs," and social posts from agenda summaries.	Produces 100+ personalized pieces daily, A/B tests for engagement, and deploys via LinkedIn/email blasts—scaling content to viral levels without writers.
4. Sales Pipeline Management	AI CRM like Salesforce Einstein or HubSpot AI that auto-tracks leads, predicts churn, and schedules follow-ups based on user interactions with our map/reports.	Handles infinite pipelines, flags high-conversion opps (e.g., devs eyeing competitor zones per Mike's feedback), and automates reminders—reducing drop-offs for rapid sub growth.

5. Relationship Building and Customer Engagement	Conversational AI chatbots (e.g., Drift or Intercom AI) on our site/app that demo features, answer queries like Jacob's tag explanations, and build rapport via voice/video.	Engages 24/7, personalizes based on user history (e.g., "Based on your 10-unit params..."), and escalates only hot leads to us—penetrating markets via always-on demos.
6. Training and Enablement	AI learning platforms (e.g., Lessonly AI or custom Grok-like bots) that create interactive modules on our product, auto-updating with new features like map enhancements.	Onboards partners (e.g., AGC chapters) instantly, freeing us to focus on expansion—fast-tracks virality through self-serve enablement for affiliates.
7. Go-to-Market Strategy Development	AI strategy tools (e.g., Strategyzer AI or custom ML models) that simulate GTM plays, optimize messaging from A/B data, and map territories using agenda trends.	Runs 1,000+ scenarios overnight to target busy pockets (e.g., Manatee County), launching campaigns in days vs. months for aggressive share capture.
8. Performance Coaching and Mentoring	AI performance analytics (e.g., Gong.io AI) that reviews "calls" (even automated ones), provides feedback, and mentors via simulated coaching sessions.	Scales "team" guidance to infinite users/partners, iterating on what works (e.g., map-focused pitches from Mike) for quicker optimization and growth.
9. Content and Campaign Optimization	AI optimization engines (e.g., Optimizely AI or Google Optimize with ML) that analyze	Tests variations in real-time (e.g., parameter tweaks per Jacob), boosting open rates 20-30% for

	engagement data and auto-refine campaigns, tags, and summaries.	faster lead-to-sub conversions.
10. Deal Closing and Negotiation	AI sales assistants (e.g., Chorus.ai or custom bots) that handle negotiations via dynamic pricing/scripts, closing via e-sign based on user signals.	Automates 80% of closes (e.g., \$99/mo trials), escalating complex ones—scales to hundreds of deals/month for explosive penetration.
11. Brand Representation and Awareness	AI social influencers/bots (e.g., Hootsuite AI or custom X/LinkedIn automators) that post, engage, and run virtual events/webinars on agenda intel.	Amplifies reach to UEA/AGC networks instantly, driving organic shares and awareness in new regions like Florida without travel.
12. Quarterly Reviews and Reporting	AI dashboards (e.g., Tableau AI or Power BI ML) that auto-generate reports, predict MRR (e.g., \$24k in UT), and present insights visually.	Delivers exec-level views in seconds, allowing real-time pivots to high-ROI tactics for sustained fast growth.
13. Inbound Request Handling	AI response systems (e.g., Zendesk AI) that handle inquiries, experiment with messaging, and qualify via natural language processing.	Converts inbound (e.g., from ads) to subs 50% faster by instant personalization, freeing us for strategic expansion.
14. Sales Plays and Collateral Creation	Generative AI for plays (e.g., Persado or custom) that builds collateral from templates, tailored to	Produces ready-to-deploy materials in minutes, enabling rapid A/B testing and rollout to capture 9% market share quicker.

	segments like dirt guys per Brandon.	
15. Pipeline Development Programs	AI program builders (e.g., Marketo AI or Pardot) that plan/execute territory programs, integrating agenda data for predictive lead gen.	Automates expansion (e.g., from Wasatch to Nevada), targeting 4,377 excavators with precision for viral, low-cost penetration.

### #1 (above) -

now, with AI at the helm under Jeff's guidance, we can automate it to scale fast, targeting those 36k+ UT contractors and 4k+ excavators while penetrating Clark County and beyond. This setup will help us hit that initial 25-50 subs milestone in Wasatch Front and Vegas by auto-generating qualified leads tied to our agenda intel—think personalized pitches like "Based on last week's rezoning in Provo, here's how you can bid early." We'll outpace competitors like Mercator.ai, who use basic AI for leads but don't tie it to agendas like we will; their outbound is decent, but we improve by making ours predictive, using agenda stages/dates to time outreach perfectly.

I'll walk you through the implementation step by step, like we're building it together in the office. Each step includes what to do, why it matters for fast penetration, tools to use (focusing on AI-native ones available in 2025), timelines, costs (keeping it lean), and potential pitfalls from my CM experience. Jeff can lead the tech integration, Dave can advise on industry lists, and you handle oversight. Aim to launch this in 2-4 weeks for quick testing in UT/NV.

## Step 1: Select and Set Up the AI Lead Gen Platform

- **What to Do:** Choose a core tool like Apollo (now with advanced AI integrations) or Outreach.io (their 2025 AI engine excels at personalization). Sign up for a starter plan, connect it to our Agenda Insider backend (Jeff's AI layer via API—e.g., expose endpoints for agenda summaries). Enable features like AI lead scoring, auto-enrichment, and outbound sequencing.
- **Why It Matters for Fast Penetration:** This automates scraping and enriching leads from public sources (e.g., UT Contractor Board, NV AGC directories), scoring them high if they match hot agenda items (e.g., excavators near a 10+ unit rezoning). It lets us hit 500-1,000 prospects/week vs. manual 50, accelerating to 4% capture.
- **Tools/Integrations:** Apollo for list-building; integrate with Zapier or custom Python (Jeff can script) to pull our agenda data. Add ChatGPT-like bots (via Intercom AI) for initial qualification on our site.
- **Timeline & Cost:** 3-5 days to set up. \$100-300/mo for Apollo starter; free trial first.

- **Pitfalls & Tips:** Avoid over-customizing early—start with defaults. At CM, we wasted time on fancy CRMs; test with 100 leads to ensure no spam flags.

## Step 2: Build and Enrich Lead Lists Automatically

- **What to Do:** Upload seed lists (e.g., free UT licenses from dopl.utah.gov, NV contractors from nsbld.nv.gov). Use the tool's AI to auto-scrape/enrich: Find emails/phones via Hunter.io integration, add firmographics (e.g., company size, past projects from Dodge). Cross-reference with our agendas—Jeff scripts a feed where AI tags leads as "high-priority" if they're near projects (e.g., a GC in Provo scored high for a 20-acre entitlement).
- **Why It Matters for Fast Penetration:** Targets precise segments like dirt guys (per Brandon) or devs (per Mike), filtering for those who'd love map/parameter features. This builds a 5,000-lead database in days, ready for outreach, vs. months manually—key to quick subs in busy pockets like Vegas growth areas.
- **Tools/Integrations:** Apollo's AI enrichment; link to our DB via AWS or Google Cloud (Jeff handles security). Use Semantic Search (if on Apollo) for "excavation companies near Wasatch rezonings."
- **Timeline & Cost:** 1-2 days post-setup. Included in platform fee; \$0.01-0.05 per enriched lead if over limits.
- **Pitfalls & Tips:** Ensure ethical scraping—public data only, comply with CCPA. From CM lumps: Dedupe lists to avoid annoying repeats; start with 1,000 UT leads to validate accuracy.

## Step 3: Define AI Personalization Rules and Content

- **What to Do:** Set up prompts in the tool for generative AI (e.g., Apollo's built-in or integrate Grok/Claude). Rules: Personalize based on lead data + agendas—e.g., "If lead is excavator and agenda has 10+ acres infrastructure, pitch: 'Spot this early sewer project in your backyard? Get full details + contacts for \$99/mo.'" Include Jacob's params (e.g., 10-150 units) as teasers. Generate variants for emails, LinkedIn messages, or SMS. Create separate lists for:
  - Excavators (prime)
  - GCs
  - Developers
  - Engineers
  - Lenders
  - Title
  - Insurance
  - Specialty trades
  - Each gets **different copy**.
  -

- **Why It Matters for Fast Penetration:** Makes outreach feel custom (e.g., reference Mike's competitor map love), boosting open rates 20-30% and conversions to trials. Ties directly to our edge—agendas give "psychic" intel competitors lack, turning cold leads hot fast.
- **Tools/Integrations:** Tool's AI writer; Jeff fine-tunes with our tags (doors/acres/stage). A/B test 3-5 templates.
- **Timeline & Cost:** 2-3 days. No extra cost if built-in; \$50/mo for premium AI if needed.
- **Pitfalls & Tips:** Over-personalize and it feels creepy—keep it value-first. CM lesson: Always include opt-out; monitor for feedback like Jacob's tag questions to refine explanations in pitches.

## Step 4: Automate Outbound Sequences and Qualification

Before SmartLead ever sends:

- Run **Scrubby** (or equivalent) on every list
- Remove:
  - Catch-all only domains
  - High-risk inboxes
- Accept slightly smaller lists for **much higher inbox placement**

This keeps you out of spam hell and protects the domain long-term.

- **What to Do:** Create sequences in the tool: Day 1 email with free agenda teaser (e.g., "Top 3 Clark rezonings this week"); Day 3 follow-up with map screenshot; Day 7 call-to-action for trial. Use AI chatbots on our site/landing page to qualify inbound (e.g., "What params interest you? 10 units min?"). Auto-score responses—high if they engage with map—and route to us only for closes.
- **Why It Matters for Fast Penetration:** Runs 24/7, nurturing 1,000+ leads simultaneously to subs without team burnout. Qualifies fast (e.g., bots handle Jacob-like queries on tags), focusing us on high-value like in-person with top 5 per region.
- **Tools/Integrations:** Outreach.io sequences; bots via Drift AI. Integrate agenda feeds for dynamic content.
- **Timeline & Cost:** 3-4 days to build/test. \$200-500/mo for sequences if scaling.
- **Pitfalls & Tips:** Spam filters kill blasts—warm up domains, limit to 100/day initially. From CM: Segment by type (GCs vs. devs) to avoid irrelevance; use CAN-SPAM compliance.

## Step 5: Launch, Monitor, and Iterate with AI Analytics

# SMARTLEAD.AI — CORE SENDING ENGINE

## Account Setup

- Multiple inboxes (Google Workspace)
- Warmed slowly
- 25–40 emails/day/inbox initially

## Campaign Philosophy (Matt Lucero + Harris Kenny)

- **No pitching**
- **No features**
- **No “software” language**

You are offering **intel**, not SaaS.

- **What to Do:** Roll out to first 500 leads in Wasatch/Clark. Track metrics in the tool's dashboard: Open rates, clicks, conversions to trials/subs. AI auto-optimizes (e.g., promotes winning templates). Weekly review: Jeff tweaks based on data (e.g., if maps drive clicks, amp them). Expand lists to Tampa if UT hits 20 subs.
- **Why It Matters for Fast Penetration:** Real-time insights let us pivot fast—e.g., if dirt guys convert 2x GCs, double down. Aims for < \$150 CAC, scaling to 9% capture by month 3.
- **Tools/Integrations:** Built-in analytics; connect to Google Analytics for site traffic.
- **Timeline & Cost:** Launch Day 10-14; ongoing. Included in fees.
- **Excavators / Dirt (Primary)**
  - Angle: “*Work shows up here before permits exist.*”
  - Example:
  - We track planning agendas in [County]. Several site-prep projects are showing up weeks before permits. If I showed you one upcoming agenda this week, would that be useful?
  - **GCs**
    - Angle: “*Bid positioning before RFPs.*”
  - **Lenders / Title / Insurance**
    - Angle: “*Pipeline visibility before deals are public.*”
    - This mirrors **Nick Abraham's “offer > copy” principle.**
  - 
  - **Pitfalls & Tips:** Don't ignore churn signals—AI flags low engagement early. CM wisdom: Celebrate small wins (first 5 subs) to build momentum; if conversions lag, A/B subject lines like “Unlock Vegas Agendas Before Permits.”

Action items:

- figure out the entitlement staging data issue, is it really at the stage of DRC, Planning Commission phase, or City Council mtgs? How do we label the project in the email so that it's a useful fact?
- Figure out why a clubhouse appears in a search with a 10 unit min count
- Sewer appeared in the search also; why?
- Build V2, five cities of data; NOTIFICATIONS, EXPLORER, INTELLIGENCE.....& MAP

- **1. Volume & Pricing for Our Stage** "We're a bootstrap startup planning 500–2,000 enriched leads per month initially (Utah & Nevada construction firms). What plan and approximate monthly cost would that fall into, including credit usage?" Professional plan: \$99/mo.
- **2. Data Accuracy in Construction** "How accurate/complete is your data for general contractors and excavators in Utah and Nevada? Specifically, decision-maker emails, phones, and any signals around recent building permits pulled?"
- **3. Permit Signals** "Do you have integrations or fields that show recent permit activity or job postings that we could use for hyper-personalized outreach?"
- **4. Export & Integration** "We plan to pull enriched leads into n8n workflows that feed Smartlead. How many leads can we export daily/monthly? Do you have direct API/webhook support for n8n or Zapier?" Yes, zapier is the bridge.
- **5. Email Finding & Verification** "How does your email verification work compared to tools like Scrubby? Do credits cover verification?" 97% accurate.
- **6. Trial Details** "What does the 14-day trial include in terms of credits and features? Can we test on our own Utah/Nevada contractor list?" 100 credits, but cannot try them until we pay up.
- **7. Comparison to Clay** "Many teams use Clay for similar enrichment waterfalls. Where do you see Apollo stronger for construction industry targeting?" Apollo updates and continues to verify.
- **8. Scaling & Support** "As we grow to multiple regions, how does pricing scale? Is there dedicated support for workflow setup?" As many as we want, region count doesn't increase price. Leads and emails count can cost more, but not region tally.
- **9. Success Stories** "Do you have examples of construction-related companies (lead gen tools, material suppliers, etc.) using Apollo successfully for cold outreach?"
- **10. Any Hidden Costs** "What are common add-ons or overages we should budget for?"

- **\$450/mo = 48k credits per user. 2500emails/mo \* 92 areas, 230,000 emails = 2mm credits. = \$30k.**

Goal: Automated outreach that converts 4–5% of targeted leads to paid subscribers.

1. Core Tools Onboarding

- n8n (cloud, ~\$20/mo): Central workflow engine.
- Smartlead (~\$94/mo): Cold email sending + warmup. Buy 5–10 burner domains.
- Scrubby (pay-as-you-go): Verify/clean emails.
- Clay or Apollo: Enrichment (firmographics, recent permits).
- OpenAI node: Personalization.
- OutboundSync or simple Zapier: Sync replies/signups to Google Sheet or lightweight CRM.

2. Lead Sources

- Primary: Utah DOPL list (36k+ contractors, ~4k excavators) + Nevada equivalent.
- Secondary: HBA chapters, agenda mentions (developers/engineers who appear frequently).
- Signal trigger: New licensees or companies near agenda projects.