Sales Discovery Call

MEETING ID: 01K3TV2JKE11MM43GFKFDR2CCR

HOST: bclymer@alleatogroup.com

ATTENDEES: jacob@lindy.ai,bclymer@alleatogroup.com

Brandon's firm seeks to automate lead generation for their design-build services to improve efficiency and volume.

SUMMARY

Brandon's firm specializes in commercial design-build, focusing on warehouse infrastructure automation, currently relying on referrals and manual lead generation. Despite a remarkable 98% close rate when leads are introduced, the lead generation process is limited due to its manual nature. Brandon manages lead research via LinkedIn Sales Navigator and Apollo but seeks automation to enhance efficiency. An initial attempt to set up automation faced integration issues, particularly with Excel and Notion, prompting him to consider external solutions. The Lindy platform offers an AI-driven approach to automate tasks, with a focus on lead generation while allowing Brandon to manage outreach. Jacob showcased a research agent leveraging People Data Labs and Perplexity for enriched lead information. Two service pathways are available: self-serve or a partnership for custom agent development, with a pricing model consisting of three tiers and a recommendation for testing through a free Slack channel.

📋 \*\*Meeting Structure & Introduction\*\* (01:32 - 02:04)

Jacob structured the call into three phases: 10 minutes for use case discussion, 10 minutes for platform demonstration, and remaining time for next steps and pricing.

Brandon is seeking to automate lead generation for his commercial design-build firm, specifically targeting one problem at a time rather than implementing a comprehensive automated sales cycle.

🏢 \*\*Business Context & Current State\*\* (07:31 - 11:40)

Brandon's company specializes in commercial design-build with a specific division focused on infrastructure automation for warehouses.

Current lead generation relies primarily on referrals with a 98% close rate when introductions are made, but volume is limited due to person-to-person intensive process.

Brandon personally handles lead research and outreach, spending significant time on LinkedIn Sales Navigator and Apollo to find prospects.

⚙️ \*\*Technical Implementation Challenges\*\* (02:04 - 16:21)

Brandon attempted self-serve setup but encountered integration issues with Excel and Notion, leading him to seek support.

Lindy platform functions similarly to Zapier but incorporates AI agents with ChatGPT-like functionality for task automation.

Platform is model-agnostic, allowing different LLMs for specific actions with cost optimization.

🔍 \*\*Solution Architecture & Approach\*\* (13:10 - 18:39)

Four-step sales process identified: 1) Lead generation, 2) First contact, 3) Meaningful meeting/proposal, 4) Close, with initial focus only on automating step 1.

Agent would research prospects, gather lead lists, enrich data, while Brandon handles outbound communications initially.

Jacob demonstrated his own research agent that uses People Data Labs for contact information, Perplexity for research, and browser skills for company intelligence.

🛠️ \*\*Service Models & Implementation Timeline\*\* (06:31 - 22:34)

Two service approaches: Self-serve platform access or custom agent development partnership with Lindy's engineering team.

Custom agent development includes V1 delivery within 5 business days after contract signing, followed by 3-4 weeks of iterative training and optimization.

Engineering support includes 6-hour SLA for responses with dedicated or pooled engineer options depending on service tier.

💰 \*\*Pricing Structure & Commitment Terms\*\* (26:14 - 29:45)

Three-tier pricing model: Starter ($1,500/month), Growth ($2,500/month), Scale ($5,000/month) - all requiring 12-month commitment.

Minimum credit usage: $500/month for 50,000 credits, with research actions costing $0.15-$0.25 per lead.

Credits do not roll over month-to-month; usage must be consumed within billing period.

⚠️ \*\*Risk Mitigation & Next Steps\*\* (32:51 - 33:54)

Brandon expressed concern about 12-month commitment if agent doesn't perform effectively.

Jacob suggested starting with free Slack support channel to test basic functionality before committing to custom development.

Realistic implementation timeline: Approximately 1.5 weeks from contract signing to deployment, accounting for review and setup processes.

- Brandon's firm focuses on commercial design-build with a division for warehouse infrastructure automation, currently reliant on referrals and manual lead generation.

- Lead generation has a notable 98% close rate when introductions occur, but the process is limited in volume due to high manual effort.

- Brandon manages lead research using LinkedIn Sales Navigator and Apollo, indicating a need for automation to reduce time spent on outreach.

- Attempted self-setup faced integration challenges, particularly with Excel and Notion, prompting a search for external support.

- Lindy platform mimics Zapier but integrates AI for automating tasks, allowing the use of various language models for enhanced flexibility.

- The proposed sales process includes four steps, with initial focus solely on automating lead generation, allowing Brandon to manage initial outreach.

- Jacob showcased a research agent that utilizes People Data Labs and Perplexity for enriched lead information, demonstrating potential effectiveness.

- Two service pathways exist: self-serve access or a partnership for custom agent development, with a preliminary version promised within 5 business days.

- The pricing model consists of three tiers: Starter ($1,500/month), Growth ($2,500/month), and Scale ($5,000/month), each requiring a 12-month commitment.

- Concerns about the long commitment period were raised, with Jacob recommending a free Slack channel for initial functionality testing before full engagement.

🚀 Automation Focus: Brandon's firm aims to automate lead generation to enhance efficiency and reduce manual effort.

📈 High Close Rate: The current lead generation has a 98% close rate, but volume is limited due to manual processes.

🤖 AI Integration: The Lindy platform integrates AI to streamline tasks and improve lead generation.

💼 Flexible Service Options: Two pathways exist for service access: self-serve or partnership for custom development.

💰 Tiered Pricing Model: Pricing includes three tiers, each requiring a 12-month commitment, with concerns raised about the length.

ACTION ITEMS

\*\*Jacob Irizarry\*\*

Send meeting summary, demos, examples, and slide deck to Brandon via automated agent follow-up (31:53)

Include meeting recording in follow-up materials (32:08)

\*\*Brandon Clymer\*\*

Review provided materials and pricing information to make implementation decision (33:54)

Consider joining free Slack support channel to test basic functionality before committing to custom development (33:47)

KEYWORDS

Lead generation

Commercial construction

AI agents

Workflow automation

Infrastructure warehouses

Custom development

PROMPT SUGGESTIONS

What specific challenges did Brandon face when integrating automation tools?

How effective is the Lindy platform compared to other automation solutions?

What features of the research agent impressed Brandon the most?

How does the pricing model compare to industry standards for similar services?

What initial tests are planned for the free Slack channel?

What additional support might Brandon need during the implementation phase?

Transcript:

https://app.fireflies.ai/view/Brandon-Clymer-Jacob-Irizarry-Custom-Agent-Discovery::01K3TV2JKE11MM43GFKFDR2CCR

Transcript File:

https://download-ff.s3.us-east-2.amazonaws.com/01K3TV2JKE11MM43GFKFDR2CCR/downloads/transcript/transcript-eb9e8101-a4d5-4949-af1d-5b850f5757de-2025-09-03-17-36-14.docx?X-Amz-Algorithm=AWS4-HMAC-SHA256&X-Amz-Credential=AKIAWZAJLUBIVRJ35B6I%2F20250903%2Fus-east-2%2Fs3%2Faws4\_request&X-Amz-Date=20250903T173614Z&X-Amz-Expires=21600&X-Amz-Signature=f001d322b5c99c8864f685989713e26c4f67053a6983ddad8878469cd17c51eb&X-Amz-SignedHeaders=host

Audio:

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Video:

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