

Vendor Lead List Template

Bronte Harbour Classic 5K - Initial Research Results

Purpose: Structured template for collecting and organizing vendor leads from all research channels.

Status: This is a template. Actual lead data should be entered into the CRM system (Google Sheets/Excel).

Lead List Structure

Column Headers (for CRM/Spreadsheet)

Vendor ID Business Name Contact Name Email Phone Website Social
Media Category Subcategory Location Geography Tier Lead Source Lead Date Score Tier Outreach
Status Notes

Example Leads (Template Entries)

Health, Fitness & Running Category

Example 1: Running Store

- **Vendor ID:** V001
- **Business Name:** Oakville Running Co.
- **Contact Name:** [To be researched]
- **Email:** [To be researched]
- **Phone:** [To be researched]
- **Website:** [To be researched]
- **Social Media:** [To be researched]
- **Category:** Health, Fitness & Running
- **Subcategory:** Running Store
- **Location:** Oakville
- **Geography Tier:** Tier 1
- **Lead Source:** Perplexity Search
- **Lead Date:** 2025-12-XX
- **Score:** [To be calculated]
- **Tier:** [To be assigned]
- **Outreach Status:** Not Contacted
- **Notes:** Local running store, perfect brand fit

Example 2: Fitness Center

- **Vendor ID:** V002
- **Business Name:** [Research needed - example: "Bronte Fitness Studio"]
- **Category:** Health, Fitness & Running
- **Subcategory:** Fitness Center/Gym

- **Location:** [Research needed]
- **Geography Tier:** Tier 1
- **Lead Source:** BIA Directory
- **Notes:** [Research and fill in details]

Research Execution Plan

Step 1: Perplexity Research Queries

Run these queries to find initial leads:

"Running stores in Halton region Ontario"

Fitness Centers:

"Yoga studios Halton region"

Local Food:

"Artisan food producers Burlington Ontario"

BIAs and Chambers:

"Halton region BIA business listings"

Markets:

1. Running Stores:

1. "Running stores in Oakville Ontario"
1. "Running stores in Burlington Ontario"
1. "Fitness centers Oakville Ontario"
1. "Gyms Burlington Ontario"
1. "Local restaurants Bronte Oakville"
1. "Food trucks Halton region"
1. "Oakville Business Improvement Area member directory"
1. "Burlington Chamber of Commerce members"
1. "Oakville farmers market vendors"
1. "Burlington craft show vendors"
1. "Halton region artisan markets"

Step 2: Firecrawl Targets

URLs to crawl (when identified):

- BIA member directory pages

- Chamber of Commerce member lists
- Market vendor directory pages
- Event vendor lists

Step 3: Facebook Group Research

Groups to join and research:

- [List specific groups found via Perplexity]
- Search group posts for vendor announcements
- Review member lists for business owners

Step 4: Manual Web Search

Directories to search:

- Yelp: "Running stores Oakville"
- Google Business: Category searches
- Local directories: Yellow Pages, Local.com

Lead Collection Workflow

For Each Lead Found:

Website (if available)

Research Contact Information:

Check social media handles

Assess Fit:

Note any special considerations

Enter into CRM:

Assign Tier

Set Status:

1. Collect Basic Information:

1. Business name
1. Location (city)
1. Category
1. Visit business website
1. Find email, phone
1. Check against exclusion rules

1. Assess brand fit
1. Assign Vendor ID
1. Fill in all available fields
1. Score using scoring model
1. Outreach Status: "Not Contacted"
1. Lead Source: Record where found
1. Lead Date: Today's date

Research Targets by Category

Health, Fitness & Running (Target: 8-12 vendors)

Research Focus:

- Running specialty stores
- Athletic apparel retailers
- Fitness equipment stores
- Sports nutrition stores
- Physical therapy clinics
- Personal trainers

Sources:

- Google: "running store Oakville"
- Yelp: "fitness Oakville"
- BIA directories
- Instagram: #oakvillerunning

Local Food & Beverage (Target: 6-10 vendors)

Research Focus:

- Local restaurants
- Food trucks
- Artisan food producers
- Local breweries
- Healthy snack companies

Sources:

- Farmers market vendor lists
- Food truck directories
- Local restaurant guides
- Instagram: #oakvillefood

Family Services & Activities (Target: 6-8 vendors)

Research Focus:

- Kids activity providers
- Family entertainment
- Educational services

- Children's retail
- Family photography

Sources:

- Community event vendor lists
- Local business directories
- Facebook community groups

Wellness & Lifestyle (Target: 5-8 vendors)

Research Focus:

- Massage therapy
- Skincare services
- Natural health products
- Essential oils
- Holistic health

Sources:

- Wellness directories
- Local business listings
- Instagram: #oakvillewellness

Local Retail & Services (Target: 8-12 vendors)

Research Focus:

- Local boutiques
- Specialty shops
- Artisan crafts
- Gift shops
- Home services

Sources:

- BIA member directories
- Local business directories
- Market vendor lists

Community Organizations (Target: 4-6 vendors)

Research Focus:

- Local charities
- Non-profits
- Community groups
- Youth organizations
- Service clubs

Sources:

- Charity directories
- Community organization lists
- Local non-profit databases

Quality Control Checklist

Before Adding to CRM:

- ☐ Business name verified (spelling correct)
- ☐ Contact information validated (email format, phone format)
- ☐ Website checked (active, relevant)
- ☐ Exclusion rules checked (not in exclusion list)
- ☐ Category assigned correctly
- ☐ Geography tier assigned
- ☐ Lead source recorded
- ☐ Notes added (if relevant)

Duplicate Check:

- ☐ Business name not already in CRM
- ☐ Website not already in CRM
- ☐ Email not already in CRM

Research Progress Tracking

Metrics to Track:

- **Total Leads Found:** [Number]
- **Leads by Category:** [Breakdown]
- **Leads by Geography:** [Tier 1, 2, 3 breakdown]
- **Leads by Source:** [BIA, Facebook, Perplexity, etc.]
- **Contact Info Complete:** [Percentage]
- **Ready for Outreach:** [Number]

Weekly Research Goals:

- **Week 1:** 50+ leads identified
- **Week 2:** 100+ leads identified
- **Week 3:** 150+ leads identified
- **Week 4:** 200+ leads identified, validated, and scored

Next Steps After Lead Collection

1. **Validate Leads:** Verify contact information, check websites
1. **Score Leads:** Apply scoring model to all leads
1. **Prioritize:** Sort by Tier (1, 2, 3, 4)
1. **Prepare Outreach:** Use Tier 1 leads for first outreach wave
1. **Begin Outreach:** Start with highest priority leads

Notes

- **Start with Tier 1 Geography:** Focus on Oakville/Halton first
- **Quality over Quantity:** Better to have 100 good leads than 500 poor ones
- **Validate Early:** Check exclusion rules during research
- **Document Sources:** Track where each lead came from
- **Regular Updates:** Update lead list daily during research phase
- **Backup Data:** Export CRM regularly to prevent data loss

Document Version: 1.0

Last Updated: December 2025

Status: Template - Ready for research execution