

Vendor Research Execution Guide

Step-by-Step Guide to Building Initial Lead List

Purpose: Practical guide for executing the research plan and building the initial vendor lead list.

Phase 1: Setup (Day 1)

Step 1.1: Prepare Research Tools

- [] Set up Google Sheets CRM (or Excel) with all columns from CRM template
- [] Bookmark key directories (Yelp, Google Business, BIA websites)
- [] Join relevant Facebook groups (may take time for approval)
- [] Set up Perplexity account (if not already have)
- [] Prepare Firecrawl access (if available)

Step 1.2: Create Research Schedule

- **Week 1:** Focus on Halton Region (Tier 1) - Target 50+ leads
- **Week 2:** Expand to GTA West (Tier 2) - Target 100+ total leads
- **Week 3:** Complete research, validate leads - Target 150+ total leads
- **Week 4:** Final validation, scoring, prioritization - Target 200+ qualified leads

Phase 2: Perplexity Research (Days 1-3)

Running Stores & Fitness (Priority Category)

Query 1: "Running stores in Oakville Ontario"

- **Expected Output:** List of running stores with names, addresses
- **Action:** Extract business names, research websites, collect contact info
- **Target:** 5-8 running stores in Oakville

Query 2: "Running stores in Burlington Ontario"

- **Action:** Same process
- **Target:** 3-5 running stores in Burlington

Query 3: "Fitness centers Oakville Ontario"

- **Action:** Extract gyms, fitness studios
- **Target:** 5-8 fitness centers

Query 4: "Yoga studios Halton region"

- **Action:** Extract yoga studios

- **Target:** 3-5 yoga studios

For Each Business Found:

1. Note business name and location
2. Search for website
3. Find contact email and phone
4. Check social media
5. Enter into CRM with Vendor ID
6. Assign category and geography tier
7. Set status to "Not Contacted"

Local Food & Beverage (Priority Category)

Query 5: "Local restaurants Bronte Oakville"

- **Target:** 5-8 restaurants

Query 6: "Food trucks Halton region Ontario"

- **Target:** 3-5 food trucks

Query 7: "Artisan food producers Burlington Ontario"

- **Target:** 3-5 artisan food businesses

Query 8: "Local breweries Oakville Burlington"

- **Target:** 2-3 breweries

BIAs and Chambers (High-Value Source)

Query 9: "Oakville Business Improvement Area member directory"

- **Expected Output:** BIA website URL, member directory link

- **Action:** Visit BIA website, find member directory

- **Use Firecrawl:** If directory is web-accessible, crawl for business data

- **Target:** 20-30 businesses from Oakville BIAs

Query 10: "Burlington Chamber of Commerce members"

- **Action:** Same process

- **Target:** 15-25 businesses from Burlington Chamber

Query 11: "Milton Halton Hills BIA business directory"

- **Action:** Same process

- **Target:** 10-15 businesses from other Halton BIAs

Markets and Events (High-Value Source)

Query 12: "Oakville farmers market vendors list 2025"

- **Expected Output:** Market website, vendor directory

- **Action:** Visit market website, extract vendor list

- **Use Firecrawl:** If vendor directory is web-accessible

- **Target:** 10-15 vendors from Oakville market

Query 13: "Burlington craft show vendors"

- **Action:** Same process
- **Target:** 8-12 vendors from craft shows

Query 14: "Halton region artisan market vendors"

- **Action:** Same process
- **Target:** 10-15 vendors from artisan markets

Phase 3: Firecrawl Execution (Days 2-4)

Step 3.1: Identify Target URLs

From Perplexity Results:

- BIA member directory URLs
- Chamber of Commerce member pages
- Market vendor directory pages
- Event vendor list pages

Step 3.2: Configure Firecrawl

For Each URL:

1. Set extraction targets:

- Business name
- Category/industry
- Contact email
- Phone number
- Website URL
- Address

1. Run crawl

1. Export results

1. Clean and validate data

1. Enter into CRM

Step 3.3: Data Validation

For Each Extracted Lead:

- [] Verify business name spelling
- [] Check email format (valid)
- [] Verify phone format (Canadian format)
- [] Check website is active
- [] Validate address format

Phase 4: Facebook Group Research (Days 3-5)

Step 4.1: Join Groups

Groups to Join (from Perplexity research):

- [List specific groups found]

Join Process:

1. Request to join group
2. Wait for approval (may take 1-3 days)
3. Review group rules
4. Begin research

Step 4.2: Research Within Groups

Methods:

1. **Search Group Posts:** Search for "vendor", "market", "expo"
2. **Review Member Lists:** If public, scan for business owners
3. **Check Event Posts:** Look for market/event announcements with vendor lists
4. **Engage Respectfully:** Comment on relevant posts (if appropriate)

Data Collection:

- Business names from posts
- Contact information (if shared)
- Business categories
- Event experience (if mentioned)

Step 4.3: Manual Extraction

For Each Business Found:

1. Note business name
2. Research website and contact info
3. Enter into CRM
4. Record lead source as specific Facebook group name

Phase 5: Manual Web Search (Days 4-7)

Step 5.1: Yelp Research

Categories to Search:

- "Running Stores" in Oakville
- "Running Stores" in Burlington
- "Fitness & Instruction" in Oakville
- "Restaurants" in Bronte/Oakville
- "Food Trucks" in Halton

For Each Business:

1. Review Yelp listing
2. Visit business website (if available)
3. Collect contact information
4. Check reviews for quality assessment

5. Enter into CRM

Step 5.2: Google Business Research

Search Strategy:

- Use Google Maps: "running store near Oakville"
- Filter by location (Halton Region)
- Review business listings
- Visit websites
- Collect contact info

Step 5.3: Local Directory Research

Directories to Check:

- Yellow Pages: Category searches
- Local.com: Oakville, Burlington listings
- 411.ca: Local business directory

Phase 6: Instagram Research (Days 5-7)

Step 6.1: Hashtag Research

Hashtags to Search:

- #oakvillebusiness
- #burlingtonbusiness
- #haltonregion
- #oakvillelocal
- #oakvillerunning
- #oakvillemarket

Step 6.2: Account Identification

From Hashtag Results:

1. Identify business accounts
2. Review profiles for:
 - Business name
 - Website link
 - Contact information
 - Category (from bio/posts)

Step 6.3: Data Collection

For Each Business Account:

1. Note Instagram handle
2. Extract business name from bio
3. Get website from bio link

4. Visit website for contact info
5. Determine category from posts/bio
6. Enter into CRM

Phase 7: Data Validation & Scoring (Days 6-10)

Step 7.1: Contact Validation

For Each Lead:

- ☐ Verify email format (send test if possible)
- ☐ Verify phone number format
- ☐ Check website is active and relevant
- ☐ Verify business is still operating (check recent social posts)

Step 7.2: Exclusion Check

For Each Lead:

- ☐ Check against exclusion list (cannabis, tobacco, MLM, etc.)
- ☐ Verify not direct sponsor competitor
- ☐ Check business reputation (Google reviews if available)
- ☐ Confirm family-friendly nature

Step 7.3: Scoring

Apply Scoring Model:

- Geography Score (0-3)
- Brand Fit Score (0-3)
- Visual/Professional Score (0-2)
- Uniqueness Score (0-2)
- Category Balance (+1/-1)

Calculate Total Score (0-11 points)

Step 7.4: Tier Assignment

Based on Score:

- **Tier 1:** 8-11 points (Ideal - Priority outreach)
- **Tier 2:** 6-7 points (Good - Standard outreach)
- **Tier 3:** 4-5 points (Fallback - If needed)
- **Tier 4:** 0-3 points (Reject - Do not pursue)

Phase 8: Prioritization & Preparation (Days 10-14)

Step 8.1: Category Balance Check

Review Distribution:

- Count vendors by category
- Compare to target numbers
- Identify gaps
- Adjust priorities if needed

Step 8.2: Geographic Distribution**Review by Geography Tier:**

- Tier 1 (Halton): Target 60%+ of leads
- Tier 2 (GTA West): Target 30% of leads
- Tier 3 (Broader GTA): Target 10% or less

Step 8.3: Outreach Preparation**Prepare for Outreach:**

1. Sort leads by Tier (Tier 1 first)
2. Sort Tier 1 by category (prioritize underrepresented)
3. Prepare personalized outreach (where possible)
4. Set up email campaign (if using email tool)
5. Prepare social media posts

Research Metrics & Tracking***Daily Tracking*****Track Each Day:**

- Leads found today
- Leads by source
- Leads by category
- Contact info completion rate
- Validation status

Weekly Summary**Week 1 Summary:**

- Total leads: [Number]
- Tier 1 leads: [Number]
- Complete contact info: [Number]
- Ready for outreach: [Number]

Week 2-4: Continue tracking and reporting

Quality Assurance

Data Quality Checks

Before Starting Outreach:

- ☐ All Tier 1 leads have complete contact info
- ☐ All leads validated (not duplicates, active businesses)
- ☐ All leads scored and tiered
- ☐ Category balance reviewed
- ☐ Exclusion rules checked for all leads

Research Completeness

Check Coverage:

- ☐ All priority categories represented
- ☐ Geographic targets met (60%+ Halton)
- ☐ Multiple sources used (not just one channel)
- ☐ Quality leads (not just quantity)

Troubleshooting

If Low Lead Count:

- Expand to Tier 2 geography earlier
- Use more Perplexity queries
- Check additional Facebook groups
- Review BIA/Chamber directories more thoroughly

If Low Quality Leads:

- Refine search queries
- Focus on higher-quality sources (BIAs, markets)
- Increase validation standards
- Review scoring model

If Contact Info Missing:

- Use website contact forms
- Search LinkedIn for business contacts
- Check business registration (if public)
- Use social media DMs as backup

Next Steps After Research

1. **Finalize Lead List:** Complete validation and scoring
1. **Prepare Outreach:** Use templates, personalize where possible
1. **Begin Outreach:** Start with Tier 1 leads
1. **Track Responses:** Log all communications in CRM
1. **Iterate:** Adjust research strategy based on response rates

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Status: Ready for execution