Vendor Expo Research & Acquisition System

Bronte Harbour Classic 5K - Complete Implementation Guide

Purpose: Comprehensive system for researching, acquiring, and managing 50+ high-quality vendors for the Bronte Harbour Classic 5K expo.

Status: Complete system ready for implementation

System Overview

This vendor expo system provides a complete multi-agent workflow for:

1. **Research & Discovery**: Finding potential vendors through multiple channels
1. **Outreach & Communication**: Professional templates for all communication types
1. **Application & Intake**: Streamlined application process
1. **Screening & Approval**: Standardized scoring and review system
1. **Payment & Confirmation**: Payment processing and booth assignment
1. **Event Management**: Pre-event, event day, and post-event workflows

Document Structure

Core Documents

Scoring model

VENDOR_CRM_TEMPLATE.md

Workflow processes

VENDOR_APPLICATION_FORM.md

Integration with CRM

VENDOR_INFO_PAGE.md

Distribution strategy

VENDOR_SCREENING_RUBRIC.md

1. **VENDOR_PROFILE_AND_RULES.md**
1. Ideal vendor profiles

1. Category mix and targets
1. Geographic priorities
1. Exclusion rules
1. Complete CRM structure
1. Spreadsheet templates
1. Data collection fields
1. Application form structure
1. Field definitions
1. Processing workflow
1. Information page content
1. One-pager for vendors
1. Scoring criteria
1. Approval decision matrix
1. Review checklist
1. Quality assurance

Research & Discovery Documents

Data collection methods

LEAD_LIST_TEMPLATE.md

Quality control

RESEARCH_EXECUTION_GUIDE.md

1. **RESEARCH_SOURCES_AND_CHANNELS.md**
1. All discovery channels
1. MCP tools usage (Perplexity, Firecrawl)
1. Research strategies
1. Lead list structure
1. Example entries
1. Research targets
1. Step-by-step research process
1. Phase-by-phase execution
1. Quality assurance
1. Troubleshooting

Outreach Documents

1. **OUTREACH_TEMPLATES.md**

1. Email templates (all stages)
1. Social media templates
1. DM templates
1. Personalization guidelines

Management Documents

• **VENDOR_MANAGEMENT_WORKFLOW.md**
Complete end-to-end process

• Stage-by-stage workflows

• Event day execution

• Post-event follow-up

Quick Start Guide

Phase 1: Setup (Week 1)

1. **Review All Documents**: Read through all system documents
1. **Set Up CRM**: Create Google Sheets using CRM template
1. **Create Application Form**: Build online form using application form structure
1. **Prepare Info Page**: Create vendor information page/web page
1. **Review Rules**: Understand vendor profile, exclusions, scoring

Phase 2: Research (Weeks 2-4)

1. **Follow Research Execution Guide**: Execute research plan phase by phase
1. **Use Perplexity**: Run research queries for each category
1. **Use Firecrawl**: Crawl BIA/Chamber/market directories
1. **Manual Research**: Facebook groups, Instagram, web directories
1. **Enter Leads into CRM**: Validate, score, prioritize

Phase 3: Outreach (Weeks 4-8)

1. **Prepare Outreach**: Customize templates, personalize where possible
1. **Start with Tier 1**: Begin outreach to highest priority leads
1. **Track Responses**: Log all communications in CRM
1. **Follow Up**: Send reminders, answer questions
1. **Drive to Application**: Guide interested vendors to application form

Phase 4: Processing (Ongoing)

1. **Review Applications**: Use screening rubric for all applications
1. **Make Decisions**: Approve, reject, or waitlist based on scores
1. **Process Payments**: Monitor payment status, send reminders
1. **Assign Booths**: Create layout, assign booths to paid vendors
1. **Pre-Event Prep**: Send information packs, verify insurance

Phase 5: Event & Follow-Up

1. **Event Day**: Check-in vendors, provide support, monitor
1. **Post-Event**: Thank vendors, collect feedback, analyze results
1. **Improve System**: Update processes based on learnings

Key Metrics to Track

Acquisition Funnel

• Leads identified → Leads contacted → Applications → Approved → Paid
• Target: 200+ leads → 150+ contacted → 75+ applications → 60+ approved → 50+ paid

Quality Metrics

• Average vendor score (target: 7+)
• Category balance (all categories represented)
• Geographic distribution (60%+ Halton Region)
• Vendor satisfaction (target: 4.0+ out of 5.0)

Source Performance

• Which sources produce best leads
• Conversion rates by source
• Time investment vs. results

Tools & Resources Needed

Required Tools

- **CRM System**: Google Sheets or Excel
- **Application Form**: Google Forms, Typeform, or similar
- **Email System**: Gmail, Mailchimp, or similar
- **Payment Processing**: Stripe, PayPal, or similar
- **Research Tools**: Perplexity AI, Firecrawl (if available)

Optional Tools

- **Project Management**: Asana, Trello, or similar (for task tracking)
- **Communication**: Slack, Teams, or similar (for team coordination)
- **Analytics**: Google Analytics (for website tracking)

Team Roles & Responsibilities

Vendor Expo Coordinator (Primary)

- Overall system management
- Application review and approval
- Vendor communication
- Event day coordination

Research Team (If Applicable)

- Lead identification
- Data collection
- Lead validation
- CRM entry

Outreach Team (If Applicable)

- Initial vendor contact
- Follow-up communications
- Application support
- Relationship building

Success Criteria

Year 1 (2026) Goals

• **50+ Confirmed Vendors**: Paid and assigned booths
• **Category Balance**: All priority categories represented
• **Geographic Mix**: 60%+ from Halton Region
• **Vendor Satisfaction**: 4.0+ average rating
• **Payment Rate**: 90%+ of approved vendors pay

Long-Term Goals

• **Return Rate**: 60%+ vendors return for Year 2
• **Referral Rate**: 20%+ new vendors from referrals
• **System Efficiency**: Streamlined processes, reduced time per vendor
• **Quality Improvement**: Higher average vendor scores over time

Maintenance & Updates

Regular Reviews

• **Weekly**: During active research/outreach phases
• **Monthly**: During slower periods
• **Post-Event**: Comprehensive review and improvement

Documentation Updates

• Update based on learnings
• Refine processes based on experience
• Improve templates based on feedback
• Adjust scoring model if needed

Support & Questions

For Implementation Questions

• Review relevant document section
• Check troubleshooting guides
• Consult workflow documents

For System Improvements

• Document learnings
• Update relevant documents
• Share improvements with team

Next Steps

1. **Review System**: Read through all documents
1. **Set Up Infrastructure**: CRM, forms, communication tools
1. **Begin Research**: Follow research execution guide
1. **Start Outreach**: Use outreach templates
1. **Process Applications**: Follow screening rubric
1. **Manage Vendors**: Use complete workflow guide

System Version: 1.0
Last Updated: December 2025
Status: Complete and ready for implementation

Good luck with your vendor expo! ■