

DBR AI LEVERAGE LAB · WEEK 3 · FIELD GUIDE · FULL-COLOR FIELD EDITION

The Precision Prospecting Fieldbook

Define your ideal client, research real prospects, and lead with relevant value.

Built to turn clear ideas into useful, responsible action.

Define your ideal client, research real prospects, and lead with relevant value. This edition preserves and organizes the supplied training material into an easy-to-study magazine experience.

01 · FIND THE SIGNAL

Use the source guidance to identify the ideas, prompts, examples, and decisions that can improve your next workweek.

02 · APPLY WITH JUDGMENT

Review all client-facing language, validate relevant facts, and keep human responsibility in every important decision.

03 · TURN IT INTO A HABIT

Take one useful idea from this guide and make it part of a repeatable rhythm rather than a one-time experiment.

06 · MAGAZINE PAGES

Designed for online reading, printing, discussion, and action inside the DBR AI Leverage Lab library.

DBR AI Accelerator · Week 3 Student Handout

DBR AI Accelerator · Week 3 Student Handout

DBR AI Accelerator · Week 3

PROSPECTING | Ideal Clients & Market Research Your ICP template, AI research workflow, copy-paste prompts, and this week's homework.

The Big Idea This Week

You can't automate prospecting until you can describe your prospect. Most agents chase anyone with a pulse. Top producers know exactly who they're hunting - so AI can find more of them, research them, and warm them up before you ever make contact. This week you will build two assets you will use for the rest of the program: a one-page Ideal Client Profile and a repeatable research workflow that turns a cold name into a warm conversation in about ten minutes.

PART 1 - YOUR IDEAL CLIENT PROFILE | Fill this in

A clear picture of the person or business you are built to serve. Keep your Business Brief from Week 2 open - this builds on it. Bullet points are fine.

1. WHO THEY ARE My ideal client (age, role, income, life stage - or for B2B: industry, size, revenue):

In one sentence, the kind of person/business I serve best:

2. WHAT TRIGGERS THEM The life event or business moment that creates the need now:

Examples: new baby, new home, job change, refinance, hiring, rising costs:

3. WHERE THEY ARE Neighborhoods, niches, groups, or platforms where they cluster:

4. WHY YOU FIT The specific problem I solve better than anyone for this person:

DBR AI Accelerator · Week 3 Student Handout

DBR AI Accelerator · Week 3 Student Handout

PART 2 - 10-MINUTE RESEARCH | Warm conversation

Field Notes 02

Run this before any outreach. It's the difference between a cold pitch and a warm, relevant opener.

1 2 3 FIND RESEARCH PERSONALIZE Name the person or business and Have AI pull recent news, role, Lead your opener with something what you'd want to know before a company size, and likely pain points. true about them, not a generic pitch. call.

AI researches publicly available info to help you prepare.
RESEARCH RULE You still verify before you rely on it, and you never store sensitive personal data in the tool.

PART 3 - COPY-PASTE PROMPTS | Use + personalize

"Using my business brief above, help me write a one-page BUILD YOUR ICP Ideal Client Profile. Ask me 5 questions one at a time to sharpen who I serve best, then draft the profile."

"Act as a market researcher. What is happening in the [city/area] [housing / small-business / job] market right now RESEARCH A MARKET that would create demand for [what you sell]? Give me 5 specific angles I could act on."

"What industries in [county] are growing or hiring this year, FIND GROWING INDUSTRIES and why would each one need [your product/service]?"

"Research [person or business]. Tell me: what they do, recent RESEARCH A PROSPECT news, likely challenges, and 3 things I could mention to start a relevant, helpful conversation - no hype."

"Using my brief and this research [paste notes], write a short, WARM OPENER warm opener (text, email, or call) that leads with something true about them and offers genuine value. Under 90 words."

DBR AI Accelerator · Week 3 Student Handout

Industry Starting Points

Field Notes 03

Life Insurance Real Estate New parents, recent home buyers, business owners Empty-nesters ready to downsize; renters after a job with no key-person coverage. relocation.

Lending B2B / Business Owners Pre-approved buyers who stalled; owners refinancing Companies with 10-100 staff likely overpaying on high-rate debt. payroll taxes or benefits.

THIS WEEK'S HOMEWORK | Bring your favorite find next week

Write your one-page Ideal Client Profile using the ☐ template above.

Use AI to research 10 real prospects (people or businesses) ☐ that fit your ICP.

Save one personalization note on each - the true thing ☐ you'd lead with.

☐ Bring your favorite find to share next week.

Keep your 10 researched prospects. Next week we turn ☐ them into outreach that gets replies.

AI researches and drafts; you verify and decide. Confirm facts before you rely on them. Never store sensitive GOLDEN RULES personal data (SSNs, account or health details) in any AI tool. Lead with value and truth - research is for serving the prospect better, not tricking them.

Aim before you fire. See you next week.

The advantage appears when the lesson becomes a habit.

Choose one idea from this guide, put it into a real workflow this week, and review it in your own voice and judgment.

ONE DECISION · ONE ACTION · ONE BETTER WEEK