

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

Prospecting With Precision

Define your ideal client, research intelligently, and turn cold names into warm conversations.

Built to turn clear ideas into useful, responsible action.

Define your ideal client, research intelligently, and turn cold names into warm conversations. 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.

Week 3 — Prospecting I DBR AI Accelerator

Week 3 — Prospecting I DBR AI Accelerator

PROSPECTING I Ideal Clients & Market Research DBR AI Accelerator — Week 3 Student Handout Your ICP template, the AI research workflow, copy-paste prompts, and this week's homework.

Page 1

Week 3 — Prospecting I DBR AI Accelerator

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'll build two things you'll 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're built to serve. Keep your Business Brief from Week 2 open — this builds on it. Bullet points are fine.

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:

WHAT triggers them The life event or business moment that creates the need NOW:

(e.g. new baby, new home, job change, refinance, hiring, rising costs)

WHERE they are Neighborhoods, niches, groups, or platforms where they cluster:

WHY you fit The specific problem I solve better than anyone for this person:

Field Notes 02

Part 2 — The 10-Minute Research Workflow Run this before any outreach. It's the difference between a cold pitch and a warm, relevant opener. □ FIND — name the person or business and what you'd want to know before a call. □

RESEARCH — have AI pull recent news, role, company size, and likely pain points. □ PERSONALIZE — lead your opener with something true about THEM, not a generic pitch.

Remember the golden rule: AI researches publicly available info to help you prepare — you still verify before you rely on it, and you never store sensitive personal data in the tool.

Part 3 — Copy-Paste Prompts

Page 2

Week 3 — Prospecting I DBR AI Accelerator

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

Research a market “Act as a market researcher. What's happening in the [city/area] [housing / small-business / job] market right now 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, and why would each one need [your product/service]?”

Research a specific prospect “Research [person or business]. Tell me: what they do, recent news, likely challenges, and 3 things I could mention to start a relevant, helpful conversation — no hype.”

Turn research into a warm opener “Using my brief and this research [paste notes], write a short, warm opener (text, email, or call) that leads with something true about THEM and offers genuine value. Under 90 words.”

Field Notes 03

Industry starting points • Life: new parents, recent home buyers, owners with no key-person coverage. • Real estate: empty-nesters ready to downsize; renters after a job relocation. • Lending: pre-approved buyers who stalled; owners refinancing high-rate debt. • B2B / business owners: companies with 10–100 staff likely overpaying on payroll taxes or benefits.

This Week's Homework ☐ 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 (Week 4) we turn them into outreach that gets replies.

Golden Rules • AI researches and drafts; you verify and decide. Confirm facts before you rely on them. • Never store sensitive 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.

Page 3

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