

SESSION 01 · DELIVERED

Prospect Research, automated.

Eight hours a week, reclaimed.

For Tim Cole, Vistage Chair · Denver & Colorado Springs

From Reuben “Reu” Smith · Local Nerds

Session 1 of the Recruiting Automation engagement

Date April 21, 2026

Why this document exists

You asked me to help you reclaim the 35 hours a week you're spending on recruiting — and specifically the 8 hours that disappear into research. You told me on our April 2 call that you're not looking for someone to take it over; you want to understand how AI can carry the mechanical load so you can do the part only you can do.

This is a learning document. It's meant to be read, printed, and marked up. It captures what we're building in Session 1, in your voice, with the actual data we're using. When we're deep in Session 3 or 4 and you want to remember why a decision was made, this is where you look.

There are no concepts in here you can't act on this week.

What you have when this session ends

1. **Your criteria encoded** as a formal filter. Written down, in your language, so it can be applied consistently every time.
2. **The Intrigue Hook Formula** — your “intrigued by your [X] and business leadership” move, broken down into a pattern you can extend.
3. **A set of pre-researched Denver starter prospects** that fit your public-signal criteria, each with a draft hook, a recent signal, and a fit rationale. These are research calibration as much as outreach — your judgment on who actually fits overrides.
4. **A pipeline spreadsheet** with the status states we designed together, populated with those prospects and ready to extend.
5. **A Research Engine you can use today** — the same six-point filter and hook formula, packaged three ways: (a) a Custom GPT you build in your own ChatGPT account in 5 minutes, (b) a Claude Project if you want to compare voices, and (c) a ~150-line Cloudflare Worker codebase for when you outgrow the conversational interface. The GPT is where the weekly work lives; the codebase is the engine room behind it when you scale.
6. **A session walkthrough web page** (the slideshow we used live) at props.localnerds.co/tim-cole/session-1/. Bookmarkable, shareable with anyone on your team.
7. **This document** — the written reference you can come back to.

The first three items give you a head start this week. The last four items are the system that keeps saving you every week after.

Part 1 – Your Criteria, Encoded

On our April 2 call you walked me through how you filter candidates. I wrote it down. Here it is as a formal specification – the kind of checklist that either matches or doesn't, no judgment call.

The six-point filter

A qualified prospect meets **all** of the following:

#	CRITERION	WHAT IT MEANS
1	Title	CEO, President, Founder, Owner, or Managing Partner. No VPs, no functional leaders. Title must signal P&L ownership.
2	Ownership	Privately held. Not a publicly-traded company, not a subsidiary of a Fortune 500 parent. Ownership alignment is what makes Vistage conversations real.
3	Revenue	Between \$5M and \$500M annually. Below that, the issues are different; above, the peer set shifts.
4	Location	HQ within ~25 miles of downtown Denver. You can extend or compress this as your groups evolve.
5	LinkedIn presence	Active (posts, comments, or articles within the last 6 months) <i>and</i> a reasonable network (500+ connections). A minimal-network profile is a signal of low investment in the medium – and likely low responsiveness to outreach.

#	CRITERION	WHAT IT MEANS
6	Not a conflict	Not another Vistage chair, not a competing executive coach, not an identifiable current Vistage member.

Encoded in the Research Engine: This exact filter lives in the system prompt at `tim-research-engine/PROMPT.md`. When the engine researches a name, it checks against all six criteria. If any fails, the engine returns a `disqualified` field instead of full research — with a 1-sentence reason. That’s your auto-filter.

What this costs you in decisions

The filter is *explicit* on purpose. Every criterion you leave implicit — something you’d “know when you see it” — is a criterion neither I nor Claude can apply for you. That’s fine if you want to keep it in your head. But anything we can pull into the filter is something that stops eating your attention.

A question for later: is there a seventh criterion we should add? Tenure in role? Industry exclusions? Evidence of community involvement? We can make the filter as strict as you want. The more we add, the more the engine will reject — and the less you’ll chase marginal prospects.

Part 2 – The Intrigue Hook Formula

This is the part of your process that I think is the most underrated and the most portable. Most outreach personalization is theater. Yours isn't, because it's a *specific phrase* anchored to a *specific observation* you earned by doing the reading.

Your pattern

“...intrigued by your [X] and business leadership...”

Where [X] is:

- Specific, not general (“your recent post on shop-floor automation” — not “your work in manufacturing”)
- Drawn from something the person actually did, said, or led
- In their language, not yours (“expanding into commercial plumbing” — not “vertical market growth”)
- One phrase long, not a paragraph

Why it works (and why generic personalization doesn't)

The recipient is reading 40 cold outreach emails a week. The first signal they use to sort is: *did this person actually look at me, or did a template look at me?* A generic “impressed by your leadership” fails that check instantly — it's a phrase a template would write. A specific “intrigued by your Q1 expansion into Fort Collins and business leadership” passes it — because a template can't write that sentence.

That one sentence is worth the six hours of research that goes into a week's batch. It's the *whole* reason your response rate is what it is.

Worked examples – the anatomy

For each example, the [X] comes from a real, specific, public signal.

Example 1 — From a CEO’s recent LinkedIn article. They posted an article titled “*Why we stopped hiring externally for senior roles.*”

Hook: intrigued by your thinking on promoting leaders from within and business leadership

Example 2 — From a milestone announcement. They posted a photo of a ribbon-cutting at their company’s new Greeley facility.

Hook: intrigued by your expansion into Northern Colorado and business leadership

Example 3 — From a recurring topic across multiple posts. They’ve posted three times in the last two months about ESOP transitions.

Hook: intrigued by your work on employee ownership transitions and business leadership

Example 4 — From a public award or recognition. Their company was named to the DBJ Top 25 Fastest-Growing Private Companies.

Hook: intrigued by making the DBJ Fastest-Growing list two years running and business leadership

Example 5 — From a specific operational choice. They’ve publicly written about moving from a traditional agency model to a fractional/fixed-fee model.

Hook: intrigued by your move off billable hours and onto fixed pricing and business leadership

Notice: none of these use the words “impressive,” “inspiring,” or “innovative.” Every one of them is a thing the recipient knows is true about themselves. That’s what makes them land.

The three failure modes

The hook goes wrong in three predictable ways. The Research Engine’s system prompt is specifically instructed to avoid all three.

1. **Vendor voice.** “Intrigued by your leadership in the HVAC space and business leadership” reads like a sales email because “leadership in the [space]” is vendor-speak. Avoid the bare noun-phrase; use a specific action or observation.
2. **Generic superlatives.** Any sentence that would work for 100 other CEOs isn’t personalization. If you could paste the name of another prospect into the slot and the hook would still fit, it’s too generic. Kill it.
3. **Time-dilated references.** “Intrigued by your work on digital transformation” — when? Every CEO has worked on digital transformation. Anchor to a specific, recent thing.

When you can’t find a hook

If you read a profile and nothing specific jumps out, don’t force it. Two honest paths:

- **Skip the candidate.** If there’s nothing to hook into, they’re probably not a good first-contact anyway.
- **Use a softer opener.** “Wanted to introduce myself — I chair a Vistage peer group for Denver CEOs and [mutual connection] suggested you’d be a fit.” No hook, but still specific.

The worst outcome is inventing a hook that isn’t true. The recipient will feel the fake and you’ll lose the room.

Part 3 – The Starter Prospects

These are real people at real companies in Denver metro who fit your six-point **public-signal** filter. Each was researched using the Research Engine’s system prompt — same criteria it will apply for you going forward — and hand-reviewed so the hook is specific, defensible, and in your voice.

Important framing before you read further:

The engine can only see what’s public: LinkedIn, news, company sites. It can’t see what *you* know — who you’ve already met, who Nancy has flagged, who has family dynamics that make Vistage a non-fit, who you just have a gut feel about. **Your judgment on who’s actually a prospect overrides every name below.** Treat this list as calibration fuel for how the system *sounds* and *thinks* about your criteria, more than as your final prospect queue.

Three caveats before any outreach:

1. **Vistage portal check is still yours.** I cannot access your Vistage CRM. For each prospect you want to pursue, run the availability check and claim the 60-day window before sending an email.
2. **Hook variants.** Each prospect comes with three hook variants. Pick the one that sounds most like your voice for that person. A single-character edit (yours) beats the cleanest draft (mine) every time.
3. **Flags are real.** The “Flags” line notes anything you should know before outreach — recent acquisitions, known publicity, likely-already-pitched signals. Read them before you hit send.

The starter list at a glance

#	NAME	COMPANY	INDUSTRY	REVENUE	EMPLOYEES
1	Marco Antonio Abarca	Ready Foods, Inc.	Food manufacturing	\$50-100M	~250
2	Rordan Shane	Shane Co.	Specialty retail (jewelry)	\$100-250M	~1,093
3	Celeste Cizik, PE	Group14 Engineering	Sustainable engineering	\$5-10M	78
4	Adam Kaplan	Solera Senior Living	Senior living healthcare	\$100-250M	~1,000

#	NAME	COMPANY	INDUSTRY	REVENUE	EMPLOYEES
5	Brad Armstrong	General Air Service & Supply	Industrial distribution	\$25-50M	~195
6	Levi Torres	High 5 Plumbing	Residential home services	\$25-50M	~150-200
7	Sean McNicholas	SSA Group	Cultural attractions	\$100-250M	~1,000+
8	Kenneth Boyd	Denver Beverage	Beverage distribution	\$10-25M	50-100
9	Jon Nordmark	Iterate.ai	Enterprise AI software	\$5-10M	~109

Detail for each is below. One name — Tim Brooks of Lohmiller — was researched and then pulled at your direction before this document shipped. Good reminder that the engine’s signal is only as strong as the public record; your context always wins.

1. Marco Antonio Abarca – Ready Foods, Inc.

- **Title:** CEO, Owner & President
- **Industry:** Food manufacturing
- **Revenue band:** \$50-100M (5 plants, 1M+ lbs/week, 1,000+ Colorado restaurants + 32 states)
- **HQ:** Denver · **Employees:** ~250
- **LinkedIn:** [linkedin.com/in/marco-antonio-abarca-0b5a61](https://www.linkedin.com/in/marco-antonio-abarca-0b5a61)
- **Recent signal:** Named ColoradoBiz “CEO of the Year” finalist (late 2024). Featured in KUNC’s Sept 9, 2025 story on Colorado factory automation. His newest “Fox Plant” produces ~4x the output of beans and salsa with the same headcount. Said in that piece: *“Finding good workers is always hard. Training good workers is hard.”*
- **Intrigue Hook — pick one:**
 1. intrigued by your work turning factory jobs into “good, serious working-class jobs with benefits” at Ready Foods and business leadership
 2. intrigued by your Fox Plant automation story and the Fourth Industrial Revolution lens you bring to food manufacturing and business leadership
 3. intrigued by your journey from Stanford Law to running a family food manufacturer feeding a quarter of Colorado’s restaurants and business leadership

- **Why they fit:** Yale/Stanford-educated second-gen owner who chose the factory floor. Thinks systemically about automation and workforce philosophy — a curious, peer-oriented learner.
- **Flags:** Likely approached by other Denver Vistage chairs (CEO-of-Year finalist profile). Lead with specificity. Serves on Colorado Inclusive Economy board — confirm he isn't already in a peer group.

2. Rordan Shane – Shane Co.

- **Title:** President & CEO
- **Industry:** Specialty retail (jewelry)
- **Revenue band:** \$100-250M (Owler/ZoomInfo: \$156.2M; 21 stores in 13 states; largest independent retail jeweler in the US)
- **HQ:** Greenwood Village · **Employees:** ~1,093
- **LinkedIn:** [linkedin.com/in/rordan-shane-8737206](https://www.linkedin.com/in/rordan-shane-8737206)
- **Recent signal:** Spring 2025 commentary: *“Tariffs are creating uncertainty, and retailers must balance rising costs with smart pricing to protect margins without losing customer trust.”* Publicly engages with OpenAI/Stripe Agentic Commerce Protocol news — signals curiosity about AI-in-commerce.
- **Intrigue Hook — pick one:**
 1. intrigued by your recent take on independent jewelers navigating tariffs without sacrificing customer trust and business leadership
 2. intrigued by your 4th-generation stewardship of America's largest independent jeweler and business leadership
 3. intrigued by your curiosity around agentic commerce and AI's impact on specialty retail and business leadership
- **Why they fit:** 4th-gen family-business CEO running a century-old retail brand in transition — precisely the kind of CEO who benefits from a peer group of non-competing operators facing parallel disruptions.
- **Flags:** Tom Shane (his father, famous for radio spots) is still active in the business — family-succession dynamics may mean Rordan has an informal “peer board” already. Nationally known, likely pitched before.

3. Celeste Cizik, PE – Group14 Engineering, PBC

- **Title:** President & CEO
- **Industry:** Sustainable building engineering
- **Revenue band:** \$5-10M (RocketReach 2025: \$9.6M; 78 employees)
- **HQ:** Denver (recently expanded to larger Capitol Hill office) · **Employees:** 78
- **LinkedIn:** [linkedin.com/in/celeste-cizik-5106905](https://www.linkedin.com/in/celeste-cizik-5106905)
- **Recent signal:** Celebrated Group14's Capitol Hill office expansion. Quoted in Business Wire coverage of a 2025 Colorado all-electric-buildings policy study Group14 authored, pushing back on state regs that *discourage* electrification despite lower lifecycle costs.
- **Intrigue Hook – pick one:**
 1. intrigued by your research challenging Colorado's energy policy on all-electric buildings and business leadership
 2. intrigued by how you've scaled Group14 from founder-led to B-Corp CEO while keeping the Public Benefit Corp mission intact and business leadership
 3. intrigued by your work as a woman-owned engineering firm growing into a larger Cap Hill office and business leadership
- **Why they fit:** Took the CEO seat from a retiring founder (Sue Reilly) in 2023 — still in the “settling into the big chair” phase Vistage serves well. B-Corp/PBC values orientation suggests a mission-aligned peer circle would fit.
- **Flags:** Certified WOSB/WBE and B-Corp — she may prefer women-owned peer groups (NAWBO, WPO) over a traditional Vistage CEO group. Worth acknowledging that in outreach.

4. Adam Kaplan – Solera Senior Living

- **Title:** Founder & CEO
- **Industry:** Senior living operations (healthcare services)
- **Revenue band:** \$100-250M (16 communities × unit-year economics post-SageLife acquisition)
- **HQ:** Denver · **Employees:** ~1,000
- **LinkedIn:** [linkedin.com/in/adam-kaplan-solera](https://www.linkedin.com/in/adam-kaplan-solera)

- **Recent signal:** Oct 8, 2025 — Solera joined the “Alliance for Connected Senior Care” with Inspiren. Adam publicly cited Lumina Las Vegas results: falls down 57%, ER visits down 54%, hospitalizations down 44%. March 2025 led SageLife acquisition — 16K LinkedIn followers.
- **Intrigue Hook — pick one:**
 1. intrigued by the Alliance for Connected Senior Care you just joined and the 57% fall reduction at Lumina and business leadership
 2. intrigued by your bet that senior-living operators need to embrace value-based care and business leadership
 3. intrigued by your SageLife acquisition and the way you’ve tripled Solera’s footprint while staying Denver-based and business leadership
- **Why they fit:** Founder-CEO in active expansion mode (doubled community count in 12 months), vocally curious about AI and new care models, speaks like someone who still wants sharper peer sparring.
- **Flags:** Hyper-growth / integration mode — calendar tight through 2026. Lead with “here’s what a peer board could *save* you time on.” Confirm he isn’t already in YPO/EO.

5. Brad Armstrong – General Air Service & Supply

- **Title:** President
- **Industry:** Industrial distribution (welding & gases)
- **Revenue band:** \$25-50M (ZoomInfo \$30.3M; 8 Front Range retail locations; 195 employees per Denver Post Top Workplaces 2025)
- **HQ:** Denver (1105 Zuni St) — Brad personally based in Littleton · **Employees:** ~195
- **LinkedIn:** [linkedin.com/in/brad-armstrong-7a266519](https://www.linkedin.com/in/brad-armstrong-7a266519)
- **Recent signal:** Mid-2025 company post celebrated Brad’s 25-year anniversary, emphasizing the family-and-employee-owned structure (“3rd generation family-owned”). General Air’s newest location opened in Silverthorne, continuing an 8-store Front Range build-out.
- **Intrigue Hook — pick one:**
 1. intrigued by your 25 years at General Air and the family-and-employee-owned model you’ve built out across eight Front Range locations and business leadership
 2. intrigued by your Silverthorne expansion and how you’re scaling a third-generation family distribution business and business leadership

3. intrigued by your long tenure shepherding General Air from a Denver shop into a Colorado-wide welding-and-gas distributor and business leadership

- **Why they fit:** Classic Vistage profile — multi-generational family-and-employee-owned Colorado business at the \$25-50M size, operating across a physical footprint. 25-year operator who values continuity and culture.
- **Flags:** Family + employee-owned ownership structure means his “boss” is effectively an ownership collective — surface the peer-group value proposition carefully. Industrial/welding space is consolidating (Airgas/Air Liquide pressure) — he may be thinking about it, which could itself be a genuine hook.

6. Levi Torres – High 5 Plumbing, Heating, Cooling & Electric

- **Title:** President & Co-Owner
- **Industry:** Residential home services
- **Revenue band:** \$25-50M (HVAC Insider: 71% growth in 2024 vs 2023; Inc. 5000 2022 at ~\$8M compounding)
- **HQ:** Denver · **Employees:** ~150-200
- **LinkedIn:** [linkedin.com/in/levi-torres-9b4b97103](https://www.linkedin.com/in/levi-torres-9b4b97103)
- **Recent signal:** Oct 28, 2025 PR Newswire announcement — climbed to #5 on DBJ’s 2025 Fast 50 medium-business category, third consecutive year. Earlier 2025: inaugural DBJ Small Business Leaders class. Public face via FOX31 appearances on pipe-freeze prep.
- **Intrigue Hook — pick one:**
 1. intrigued by your third consecutive Fast 50 ranking and how you’ve scaled High 5 from a 2012 startup into a full-stack home services business and business leadership
 2. intrigued by your inaugural 2025 DBJ Small Business Leader recognition and the 71% growth year you pulled off and business leadership
 3. intrigued by how you’ve layered HVAC and electric on top of a plumbing business and kept the family-owned feel at scale and business leadership
- **Why they fit:** Textbook Vistage peer candidate — founder-owner, 12-year-old company, explosive growth phase, wrestling with scaling culture and adding service lines. Public face of the brand who tells his story well.

- **Flags:** Rapidly-growing home services is a hot PE target — he may be entertaining offers (which could be *reason* to join or reason he's busy). As a 2025 award recipient, other Vistage chairs may be pursuing him — lead with your Denver peer-group-specific angle early.

7. Sean McNicholas – SSA Group

- **Title:** CEO (second-generation owner)
- **Industry:** Hospitality & guest services (cultural attractions)
- **Revenue band:** \$100-250M (80+ zoos/aquariums/museums, 25M+ guests/year; conservative band given contract mix)
- **HQ:** Denver · **Employees:** ~1,000+ nationwide; Denver corporate ~50-100
- **LinkedIn:** [linkedin.com/in/seanmcnicholas](https://www.linkedin.com/in/seanmcnicholas)
- **Recent signal:** Late 2025 / early 2026, the SSA Group page posted about expanding its LA Zoo partnership to include membership, special events, and publications programs (“452 Hospitality approach”). Honolulu Zoo digital-ticketing launch included a public Sean quote about bringing hospitality technology to cultural attractions.
- **Intrigue Hook — pick one:**
 1. intrigued by the LA Zoo expansion and your 452 Hospitality approach to cultural attractions and business leadership
 2. intrigued by how you carried your father Kevin’s legacy forward at SSA into a 50-year, 80-attraction national business and business leadership
 3. intrigued by your Honolulu Zoo digital ticketing launch and how you’re applying hospitality tech to mission-driven attractions and business leadership
- **Why they fit:** Second-generation CEO of a 50-year family business — the classic Vistage moment where you’ve inherited a solid company and are now re-inventing it. Publicly quoted as a thought-leader, comfortable public speaker, described as equally comfortable “flipping burgers or crunching numbers.”
- **Flags:** SSA may cross the upper \$500M threshold depending on contract count — treat the revenue band as an assumption and confirm during the first call. He travels heavily across 50+ attractions; scheduling Vistage days requires real flexibility.

8. Kenneth Boyd – Denver Beverage & Denver Refreshment Services

- **Title:** Co-Managing Partner & Co-Owner
- **Industry:** B2B beverage & office-coffee distribution
- **Revenue band:** \$10-25M (supports Circle-K-tier foodservice + C-store chains per his LinkedIn; plus a parallel Office Coffee arm)
- **HQ:** Denver/Littleton · **Employees:** 50-100
- **LinkedIn:** [linkedin.com/in/kenneth-boyd-90a6a18](https://www.linkedin.com/in/kenneth-boyd-90a6a18)
- **Recent signal:** Genuinely active on LinkedIn — 124 public posts, 3,500+ followers. In 2025 ran a multi-post joke turning his 34 years in the beverage business into a “coffee-themed action figure” with actual shipped product photos, including a follow-up “Action figure on sale now!” — genuinely fun, human content that shows he’s comfortable being the face of his business.
- **Intrigue Hook — pick one:**
 1. intrigued by your 34 years in beverage and the coffee-themed action figure you actually shipped and business leadership
 2. intrigued by how you’ve built both Denver Beverage and Denver Refreshment Services in parallel while keeping the family brand and business leadership
 3. intrigued by your beverage-industry longevity and the humor you bring to LinkedIn and business leadership
- **Why they fit:** Long-tenured operator with a second-brand arm (Denver Refreshment Services / Office Coffee), wrestling with the unglamorous-but-hard questions of a service-distribution business: route profitability, driver retention, customer concentration. Demonstrable LinkedIn personality — would benefit from a peer group that challenges operational decisions, not branding.
- **Flags:** “Co-Managing Partner” — there’s at least one other owner to align with before he can commit to Vistage time. Verify which of the two entities is the primary revenue driver — the \$10-25M estimate could shift by ~\$10M depending on mix.

9. Jon Nordmark – Iterate.ai

- **Title:** Co-Founder & CEO
- **Industry:** Enterprise AI software

- **Revenue band:** \$5-10M (Latka 2024: \$7.4M with a 49-person team; Owler \$12M; raised \$6.4M from Auxier in June 2025)
- **HQ:** Denver (+ San Jose, CA office). Jon personally based in Littleton · **Employees:** ~109
- **LinkedIn:** [linkedin.com/in/nordmark](https://www.linkedin.com/in/nordmark)
- **Recent signal:** Publishing a multi-post “Public AI Risk Series” — as of late 2025 / early 2026 he posted “Shadow AI Is the Quietest Corporate Leak Happening Today,” “Why Public AI Is Incompatible With Enterprise Privacy,” and “Enterprise Vibe Coding Just Hit a Turning Point.” Named Colorado Technology Association’s 2025 CEO of the Year. January 2026 Iterate.ai announced a partnership with TD SYNEX and HPE to help hospitals recover lost insurance revenue using AI.
- **Intrigue Hook — pick one:**
 1. intrigued by your Public AI Risk series and winning CTA’s 2025 CEO of the Year and business leadership
 2. intrigued by your Shadow AI posts and the TD SYNEX / HPE healthcare partnership you just launched and business leadership
 3. intrigued by your second act building Iterate.ai after eBags and how you’re framing the enterprise AI privacy problem and business leadership
- **Why they fit:** Serial founder (eBags \$1.6B → Iterate.ai). LinkedIn Top Voice with 2,381 posts — actively curious, actively teaching, actively learning. Classic Vistage profile: founder who knows how to grow but now has to navigate harder institutional questions (channel partnerships, board management, capital structure, senior engineering recruiting).
- **Flags:** Dual HQs (Denver + San Jose) and he travels — confirm Vistage attendance bandwidth. Highly sought after (CTA, CRN, Fast Company) — differentiate on Vistage’s confidential non-self-promotional peer format. Iterate has institutional investors (Auxier Asset Management) which may create reporting obligations competing with Vistage time.

If you only move on two this week

The two strongest signal-to-specific-hook ratios from this starter set: **Jon Nordmark** (his Public AI Risk series is unmissable, dateable content) and **Sean McNicholas** (the LA Zoo expansion is a concrete, recent, specific-to-him event). Those are the two I’d test the hooks on first if you want a fast read on whether the engine’s voice matches yours. But again — your instincts on who’s actually a recruit override any of this.

Part 4 – Your Pipeline, Column by Column

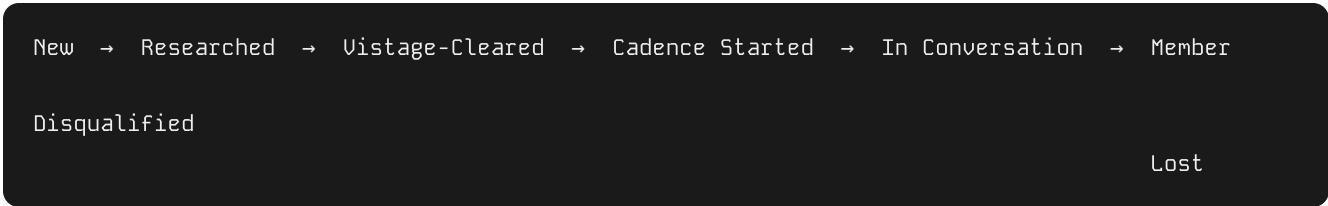
The pipeline spreadsheet is the memory of your recruiting system. Every row is a prospect. Every column captures something the research engine pulls, or something you'll update as the conversation progresses.

Column inventory

COLUMN	WHAT IT HOLDS	WHO WRITES IT
Name	Full name as it appears on LinkedIn	Engine
Title	Exact current title	Engine
Company	Legal or DBA name	Engine
Industry	1-3 word category	Engine
Revenue Band	One of the 6 bands (\$5-10M through \$250-500M)	Engine
City	HQ city	Engine
LinkedIn URL	Direct profile link	Engine
Recent Signal	The specific LinkedIn signal that powers the hook	Engine
Intrigue Hook	The chosen hook variant (of 3)	You (pick one)
Email	Primary email	You (Lusha / Vistage CRM)
Phone	Primary phone	You (Lusha / Vistage CRM)
Vistage Status	Available / Claimed / Member / DNP	You (portal check)
Claimed Until	60-day hold expiry	You (portal)
Cadence Step	0 through 8	Engine writes 0, you increment
Last Contact	Date of last outreach or response	You
Next Action	What happens next, and when	You
Notes	Freeform — anything that won't fit above	You

The status pipeline

A prospect moves through states in order:



STATE	MEANING	WHEN YOU MOVE TO IT
New	Added to the sheet, not yet researched	You drop a name in; engine hasn't run yet
Researched	Engine has run; you have hook + signal + fit	Engine sets this automatically
Vistage-Cleared	Portal check done, claimed for 60 days	After you run the portal check
Cadence Started	Step 1 of your 8-step sequence is out	When the first email is sent
In Conversation	Replied, scheduled, or calling	When they respond or you book
Member	Joined the group	The good ending
Disqualified	Doesn't fit after all (public company, moved away, etc.)	When you realize the filter missed something
Lost	Silent through 8 steps, or explicit no	When you stop pursuing

The important thing about states: conditional formatting on the Status column makes this whole sheet a visual scoreboard. Glance at it on a Monday morning, you see who's where.

Part 5 – The Research Engine (Three Ways to Use It)

What it actually is

One system prompt, wearing three different interfaces. The same six-point filter and hook formula either:

- sits inside a **Custom GPT** you build in your own ChatGPT account (**this is where you'll live day-to-day**),
- sits inside a **Claude Project** if you want to A/B the writing against ChatGPT,
- or sits inside a **Cloudflare Worker** codebase for when you need to process 50 names in one shot or hook it into your spreadsheet directly.

The *brain* is the prompt. The *doors* are these three interfaces. You choose the door based on what the task needs.

The recommended path – Custom GPT first

You already live in ChatGPT. You already built your agenda app there. Your muscle memory is there. So that's where we start.

Inside the folder I'm handing you (`tim-research-engine/`), there's a file called `CUSTOM-GPT-SETUP.md` . It walks you through building your Research Engine as a Custom GPT in about 5 minutes, step by step. The steps are short:

1. Open chatgpt.com/gpts, click **+ Create**, jump to the **Configure** tab.
2. Paste the name, description, and full instruction block from the setup file (~60 lines of instructions that encode your six criteria, your hook format, and your honesty rules).
3. Turn on **Web Search** in Capabilities.
4. Set visibility to **Only me**.
5. Save.

You open it from your ChatGPT sidebar under “My GPTs.” You paste a name. It runs the filter, pulls LinkedIn and news, and hands back the same research card format you saw in Session 1 — revenue band, recent signal, three Intrigue Hook variants, fit rationale, flags.

No code, no terminal, no deploys, nothing to maintain. You edit the instructions from inside ChatGPT whenever you want to tune.

The second door – Claude Project (optional, for comparison)

Same system prompt, different interface, generally better writing on the hooks. If you have Claude Pro (or want to try it), `CLAUDE-PROJECT-SETUP.md` walks you through building the parallel version. Takes 5 minutes. Identical setup, just in Claude.

Worth doing once: feed both the same name. Compare the hooks. Over time you'll learn which tool your voice actually prefers. That's useful calibration.

The third door – the Cloudflare Worker codebase

When you outgrow the conversational interface – 50 names in one batch, or you want the engine called automatically from a spreadsheet row, or you want nightly re-checks on your active prospects for new signals – that's when the codebase in this folder earns its keep.

It's the same prompt, packaged as a web endpoint. ~150 lines of TypeScript. You deploy it with one command. It sits on Cloudflare's free tier. Read `README.md` in the codebase folder for what it is, `RUN-IT.md` when you're ready to deploy it, `ARCHITECTURE.md` when you're curious how it works.

You do NOT need to touch this today. Session 1 ends with the Custom GPT in your hands. The codebase is there for Session 3 or 4, when we talk about scaling.

What's in the folder

```
tim-research-engine/
├── CUSTOM-GPT-SETUP.md      ← START HERE – builds your Custom GPT in 5 min
├── CLAUDE-PROJECT-SETUP.md ← The parallel Claude version (optional)
├── PROMPT.md               ← The system prompt, block-by-block with WHY each piece exists
├── README.md               ← What the codebase is
├── RUN-IT.md               ← How to deploy the Worker (Session 3+)
├── ARCHITECTURE.md         ← Plain-English walkthrough of the code
├── HOW-TO-EXTEND.md        ← Recipes: add a criterion, cache results, etc.
└── src/index.ts            ← The actual Worker (150 lines)
```

The principle

You didn't buy a product. You bought a small system you understand, wearing the interface you already know. The GPT is a convenience. The Claude Project is a choice. The codebase is the door we open when you decide you want to scale. All three share the same brain, so improvements to the prompt flow through every interface you use.

Part 6 – Your Week One Playbook

Here's what you do this week to turn this session into outcomes.

Monday – pick your five

Open the pipeline spreadsheet. Read the hooks for the starter prospects. Pick **five** you want to move on this week. Leave the rest – we'll come back to them.

The five you pick should be: - **One** where the hook feels strongest to you (the one you'd send today if nothing else changed) - **One** where the industry matters to one of your other members (warm lead for referral-of-referral later) - **One** in a revenue band you're light in (balances your group composition) - **Two** you can defend out loud – meaning if someone asks “why this person?”, you have a one-sentence answer

Monday – Vistage portal clear them

For each of the five, check the Vistage portal, claim the 60-day window, update the `Vistage Status` column to `Vistage-Cleared`.

Tuesday – put them in your phone

Using your existing Lusha / contact-extraction flow, get phone and email into your phone + Outlook contacts for caller ID and ease of reply. Update the `Email` and `Phone` columns.

Wednesday – send Step 1

Fire your 8-step cadence Step 1 for each of the five. The `Intrigue Hook` column has your chosen hook ready to drop into the email. Update `Cadence Step` to `1` and `Last Contact` to today's date.

Thursday – Research Engine test drive

Pick two new names – people you've been meaning to look up – and run them through the Research Engine. Either hit the endpoint with `curl`, or use the little form on the Workbench

page. Compare the engine's hook to what you would have written yourself. If the engine wins, adopt the hook. If you win, note what was missing — that's your prompt-tuning note for Session 2.

Friday – prep for Session 2

Reply to my recap email with:

1. Which of the starter prospects moved to Cadence Started, and any first reactions.
2. Anything about the hooks that felt off, or any edit you made to one of the hooks (this is *very* useful signal).
3. The actual column headers from your current spreadsheet (so we can align schema in Session 2).

That's Week One. A batch of starter prospects researched without your hours. Five of them in outreach. The Research Engine validated on two fresh names. Your spreadsheet live.

Part 7 – Roadmap: Sessions 2–5

Where we go from here. We're committed to Session 1; everything after is your call per the engagement letter.

SESSION	FOCUS	WHAT YOU GET
2	Schema alignment + batch research	Your existing spreadsheet columns folded into the pipeline. Research Engine gains a batch endpoint so you can paste 20 names and get all results in one shot.
3	Outreach sequencer	Your 8-step cadence encoded. Automatic step-advancement based on the spreadsheet status column. The Worker starts generating personalized per-step email drafts in your voice — still for you to review and send, never to send autonomously.
4	Signal watcher	A second Worker that re-checks your active prospects' LinkedIn weekly for new signals. New signal → new hook suggestion → bumps priority in the pipeline.
5	CRM handoff + polish	Light integration with whatever CRM you settle on (Outlook contacts, HubSpot Free, or stay in sheets). Documentation pass; any remaining cleanup; you run the system solo for a week, we debrief.

After Session 5, we either wrap the engagement or scope a Season 2 — new initiatives like member-retention signals, speaker prep research for your Vistage events, or a parallel engine for board-candidate qualification in your professional network.

Session 6 is deliberately held as optional in the proposal. Six sessions might be perfect. It might also be four. You tell me.

Appendix – Where Everything Lives

Your workspace

Everything in one place, bookmarkable any time:

timc.localnerds.co

That's your hub. Session 1 lives there today. Sessions 2, 3, 4, 5 will stack up there as we do them.

What's in Session 1

FILE	WHAT IT IS
This Playbook (PDF)	The written reference you're holding
Custom GPT Walkthrough (PDF)	Step-by-step guide to building your Research Engine in ChatGPT
Pipeline spreadsheet (CSV)	Starter prospects, pre-populated, ready to import into Google Sheets or Excel
Research Engine codebase (ZIP)	The full engine, including the GPT instructions and the Claude version, yours to keep
Session walkthrough (slideshow)	What we clicked through together, bookmarkable for any time

Download any of them from timc.localnerds.co/session-1/.

Our commitments

COMMITMENT	DEADLINE
This document delivered (PDF + markdown)	End of Session 1 (today)
Session 1 recap emailed	Within 24 hours — by end of day 2026-04-22
Session 1 invoice (\$100) via QuickBooks	Within 48 hours
Next session scheduled	By end of this week

Questions between sessions

Email me: reu@localnerds.co — reply to any message in this thread. Between-session email support is included in the engagement. Real response time: same-day for anything blocking, next-day for bigger questions.

Built for Tim Cole by Local Nerds, April 2026. Reuben “Reu” Smith · 970.800.1295 · reu@localnerds.co