AI Stagefinder – Assistant Daily & Weekly Checklist

This checklist is designed to guide a VA through the complete workflow—from prospecting to outreach to weekly reporting. It ensures nothing is missed, quality stays high, and speakers receive consistent results.

✔ DAILY WORKFLOW CHECKLIST

1. Preparation

☐ Open master Word/Google Doc for today's event research
☐ Open weekly CSV tracking spreadsheet
☐ Confirm the speaker's topic, positioning, and key talking points (the Finder uses this automatically, but you must understand alignment)
☐ Review yesterday's follow-ups and pending replies

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2. Run New Finder Searches

For each scheduled city/month combination:

☐ Input **City + Month + Year** into the Finder
☐ Review event list for relevance
☐ Copy each event's full output into the master research document
☐ Note confidence scores for keynotes and breakouts
☐ Ensure no duplicates are added
☐ After completing all monthly searches for that city:
    ☐ Run "expand by 20 miles"
    ☐ Exclude previously found events
    ☐ Add new qualifying events to the master document

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3. Research Decision-Maker Contacts

For every new event added today:

☐ Click the contact/team links provided by Stagefinder
☐ If unhelpful, manually navigate the site → About → Staff/Team
☐ Identify:
    ☐ Executive Director / CEO
    ☐ Director of Events
    ☐ Director of Education
    ☐ Editorial Manager (for articles)

☐ Record:
    ☐ Full name
    ☐ Email
    ☐ Title
    ☐ Phone number (if found)

☐ If accurate contacts cannot be found within **5 minutes** → mark as "Skipped (No Contacts)" and move on

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4. Build the Outreach Package

For each event with complete contact info:

☐ Paste full event description into the Outreach Generator
☐ Select keynote/breakout (based on confidence rating)
☐ Select **Submit article first → YES**
☐ Select **Emails from assistant → YES**

☐ Copy ALL generated outputs into the case file:
    ☐ Attendee challenges summary
    ☐ SWOT analysis
    ☐ List of previous speakers + estimated fees
    ☐ Personalized introduction email
    ☐ Article submission email template
    ☐ Voicemail script
    ☐ Full follow-up sequence
    ☐ Custom RFP
    ☐ Full article
    ☐ Similar events list

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5. Submit Article (When Ready for Outreach)

For each event selected for outreach today:

☐ Draft personalized salutation: "Hi Kristen,"
☐ Paste the full article (including title) **into the body of the email**

☐ Do **not** attach files
☐ Send to the correct Editorial Manager
☐ Log the article submission in the weekly CSV

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6. Send Outreach Email

After article submission:

☐ Draft personalized salutation: "Hi Peter," (or appropriate name)
☐ Send email to the **Executive Director**
☐ CC the **Senior Event Manager** or **Event Coordinator**
☐ Use the personalized email generated by Stagefinder
☐ Log the outreach email in the CSV
☐ Add any unique notes (event quirks, deadlines, speaker fit, etc.)

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7. CRM Integration & Follow-Up

For every outreach email sent:

☐ Add the follow-up sequence to your CRM
☐ Schedule reminders for each step
☐ Mark each email as:
　　☐ Sent
　　☐ To follow up
　　☐ Awaiting response
　　☐ Closed (not pursuing)
☐ Respond to replies within 24 hours and notify the speaker when needed

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✔ WEEKLY CHECKLIST

1. Weekly Event Production

☐ Total new events discovered: _____
☐ Total outreach emails sent: _____
☐ Total articles submitted: _____
☐ Total follow-up emails sent: _____
☐ Total replies received: _____
☐ Events moving into speaker conversation stage: _____

Your goal is to deliver **100–150 qualified events/month** (5–8 events/day).

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2. Weekly CSV Submission

Before sending to speaker, ensure CSV includes:

☐ All new events added this week
☐ Contact details for each event
☐ Date article was submitted
☐ Date outreach email was sent
☐ Follow-up timeline entries
☐ Event response notes
☐ "No contact found" events clearly labeled
☐ "High-priority" events marked

☐ Email CSV and a summary note to the speaker by end of week

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3. Quality Assurance

☐ Double-check that all salutations used correct names
☐ Verify no emails sent with generic greetings
☐ Ensure all articles were read quickly before sending
☐ Confirm no attachments were used
☐ Review all case files for completeness
☐ Confirm follow-up reminders are set correctly

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4. Monthly Performance Benchmarks

Track progress against baseline metrics:

☐ ~80% no-reply
☐ ~20% responses
☐ ~10% paying events
☐ Target: **3–5 booked engagements per 100 events**

If performance dips:
☐ Review contact research quality
☐ Review outreach personalization
☐ Review follow-up consistency
☐ Ask for support or tool upgrade

✔ OPTIONAL: ASSISTANT SCORECARD (Daily Self-Evaluation)

Rate yourself 1–5 for each:

1. **Thoroughness of research**

2. **Accuracy of contacts gathered**

3. **Email personalization quality**

4. **Speed & efficiency**

5. **Follow-up accuracy**

6. **Documentation completeness**

7. **Professional communication**

8. **Results generated**

Total Score: _____ / 40
 Goal: **32+ consistently**