

SOP: Using AI Stagefinder for Event Prospecting & Outreach

November 21 2025

Purpose

This SOP outlines the complete workflow for virtual assistants (VAs) and support staff using **AI Stagefinder** to generate speaking opportunities, conduct outreach, and deliver consistent results for their speaker clients.

1. Expectations & Performance Standards

1.1 Responsibility

You are responsible for producing *measurable, high-quality results*. This includes:

- Generating qualified event leads.
- Finding accurate contact information for decision-makers.
- Sending customized, error-free outreach.
- Maintaining weekly documentation of work completed.

1.2 Role Impact

Your work directly affects:

- The speaker's reputation.
- Their ability to secure paid engagements.
- Whether the speaker continues working with you.

If you cannot produce results within **three months**, your client relationship is at risk.

2. Contact Information Requirements

2.1 Mandatory Contacts

For every event, you must locate:

- **Director of Events**
- **Director of Education**
- **CEO or Executive Director**
- **Magazine/Blog Editor or Editorial Manager**

You must collect (when available):

- Full name
- Email address
- Phone number
- Title

2.2 When to Move On

If you cannot find proper decision-maker contact information after **five minutes of searching**, move to the next event. Do not waste time on prospects without usable contact data.

3. Preparing Your Prospecting List

3.1 Generate Your City List

Before using AI Stagefinder:

1. Use ChatGPT, Perplexity, or similar tools.
2. Ask: “**What are the top 25 convention cities in [country]?**”
3. This list becomes your primary prospecting map.

3.2 Timeframes

Search each city:

- **One month at a time**
- **Starting 6–9 months from today**

Example:

If today is November 2025 → begin searching May–August 2026.

4. Using the AI Stagefinder Finder Tool

4.1 Finder Inputs

The Finder is fully trained on your speaker's profile.

You only need to enter:

- **City name**
- **Month + Year**

4.2 Running Sequential Searches

For each city:

1. Search Month 1 → Save results
2. Search Month 2 → Save results
3. Continue through the full 6–9 month window

4.3 Expanding Your List

After reviewing results:

- Ask the tool to **expand radius by 20 miles**
- Exclude previously listed events

4.4 Expected Output Volume

Each city/month typically yields **5–6 events**.

You should generate **100–150 events per month** for a single speaker.

5. Building the Master Research Document

5.1 Document Purpose

Every event you find must be copied into a **master Word document** to create a complete research file.

5.2 What to Include

For each event:

- The event summary from AI Stagefinder
- Contact page links
- Staff/leadership contacts
- Confidence rating (keynote & breakout likelihood)
- SWOT analysis
- List of previous speakers & typical fees
- Outreach email
- Voicemail script
- Follow-up sequence
- Customized RFP
- The included article for submission
- “Similar events” list

This becomes the “case file” for your outreach.

6. Finding Decision-Maker Contact Information

6.1 Start With Stagefinder Links

The tool often provides:

- Contact page URL
- Team/staff page URL

6.2 Manual Research Steps

If the provided link is generic or unhelpful:

1. Navigate to the organization's main site.
2. Look for:
 - "About"
 - "Staff"
 - "Leadership"
 - "Team"
 - "Contact"
3. Identify the appropriate person for:
 - Event booking
 - Article submissions
 - Decision-making authority

6.3 Correct Salutation Format

Never use generic greetings like:

- "Dear Selecting Committee"

- “Dear IABC”

Always use:

- “Hi Peter,”
- “Hi Kristen,”

This is essential for personalization and relationship-building.

7. Evaluating Confidence Ratings

AI Stagefinder provides a **1–10 rating** for:

- Keynote likelihood
- Breakout likelihood

Use this to prioritize outreach but do **not** rely on it exclusively.
A score of 7/10 for keynotes is a strong target.

8. Generating the Outreach Package

After pasting the event information into the Outreach Generator:

8.1 Required Inputs

- Role (Keynote or Breakout) – select based on likelihood
- Whether you're submitting an article first – **always choose YES**
- Whether emails are coming from an assistant – choose **YES** if you are the VA

8.2 System Outputs

The tool will generate:

- Attendee challenge overview
- SWOT analysis
- List of previous speakers + their estimated fees
- The personalized introduction email
- A voicemail script
- A follow-up sequence
- A customized RFP
- The full article to submit
- A separate article introduction email
- A “similar events” list

Copy all of these into the master case file.

9. Submitting the Article

9.1 Never Send Attachments

Do **not** attach the article as a file.
Attachments often trigger spam filters.

9.2 Correct Submission Method

Your article submission email must include:

- Personalized greeting: “Hi Kristen,”
- Intro text provided by the tool
- **Direct paste of the full article**, including the title

This increases delivery rates and ensures the editor reads the content.

10. Sending the Outreach Email

10.1 Who to Email

Send your customized outreach email to:

- The **Executive Director or CEO** (primary)
- CC the **Senior Event Manager or Event Coordinator**

10.2 Why CC the Events Team

This opens the conversation about:

- Payment
- Availability
- Fit for the speaker's topic

The speaker—not the VA—should handle detailed conversations once a reply arrives.

11. Follow-Up & CRM Integration

Add the tool's follow-up sequence to your CRM.

You are responsible for making sure the follow-up happens on schedule using:

- Reminders
- Templates
- Automation where possible

Effective follow-up dramatically increases booked engagements.

12. Weekly Reporting Requirements

You must send the speaker a **weekly spreadsheet** (CSV template provided) containing:

- New events found
- Contacts identified
- Outreach sent
- Follow-ups completed
- Replies received
- Next steps

This spreadsheet is your proof of work.

No spreadsheet = no demonstrated work = no justification for payment.

13. Performance Benchmarks

From 100 events:

- ~80 will not reply
- ~20 will reply
- ~10 will pay speakers
- **Your target is to help land 3–5 engagements** through correct outreach and follow-up

If you're not hitting this, revisit your research and personalization practices.

14. Troubleshooting & Support

If the tool is missing a feature you see in the training:

- Email support for an upgrade
- Many builds are in circulation; features may differ
- Updates are provided promptly upon request

If you cannot find events:

- You're not using the tool correctly
 - Re-watch this SOP
 - Contact support immediately
-

15. Success Mindset

High-quality work =

- Accurate research
- Correct contacts
- Personalized outreach
- Clear communication
- Consistent reporting
- Professional persistence

AI Stagefinder provides the opportunities.
Your execution determines the results.