

# Daily Prospecting: Essential for sustained business growth and success

## *Quick recap*

Warren welcomed new students Minka and Stacey to the class and emphasized the importance of daily prospecting for business growth. He discussed the use of AI tools like Chat GPT for note-taking, pattern identification, and business operations, and demonstrated how to use ChatGPT projects for analyzing prospecting and networking call transcripts. He also stressed the value of data collection and usage in modern business and instructed the team on how to create a new conversation in the project using Chat GPT.

## *Summary*

### **Welcoming New Coaches and Prospecting**

Warren welcomes new students Minka and Stacey to the class. Minka is returning to coaching, focusing on "crystal couples" who have been together for at least 15 years. Stacey, an experienced coach from Southern California, specializes in retreats and helping women with autoimmune diseases, particularly Hashimoto's. The class then transitions to a 5-minute prospecting exercise, building on a previous session about LinkedIn networking. Warren emphasizes the importance of daily prospecting for business growth and explains that the day's lesson will focus on storing and using conversation information for niche development and content creation.

## **Tools for Automated Note Taking**

Warren explained two tools for note taking during Zoom meetings. Fathom Notetaker is a free tool that can be used with zoom, Google meet, or Microsoft teams. It records and takes notes during meetings and sends a transcript and video recording of each call via email. There's also a feature inside Zoom that allows for transcription during meetings, but this requires a paid Zoom account. Both tools can be used to automate the note taking process.

## **AI for Client Interaction Pattern Analysis**

Warren discussed the importance of recording and transcribing conversations for note-taking and understanding patterns in client interactions. He suggested using AI tools like Chat GPT to analyze these patterns and identify potential clients. Warren emphasized the value of engagement in identifying a niche and proposed using AI to automate this process, reducing the need for manual note-taking and pattern identification. He also mentioned the limitations of human pattern identification and the potential of AI to provide more accurate and efficient solutions.

## **Exploring AI Tools for Business**

Warren discussed the benefits of using AI tools like Chat GPT for business operations. He shared his personal experience of using AI to identify and reach out to potential clients, resulting in a significant deal. He emphasized the importance of following AI instructions to achieve desired outcomes. Warren also explained the concept of token limits in AI interactions and suggested a homework task for those unfamiliar with it. He then demonstrated how to use the 'Projects' feature in Chat GPT, which allows for organizing and tracking business activities. He highlighted the advantage of using 'Files' in Chat GPT for repetitive tasks, and concluded by explaining the four basic parts of a prompt.

## **Utilizing ChatGPT for Prospect Analysis**

Warren explains how to use ChatGPT projects for analyzing prospecting and networking call transcripts. He demonstrates creating a new project, setting up instructions for the AI, and organizing transcripts by individual conversations. The goal is to identify the user's niche, customer avatar, and core client problems, as well as to extract key phrases for marketing purposes. Warren emphasizes the importance of customizing the project instructions to fit individual needs and notes that the project can be continuously updated as new insights are gained.

## **Data Collection and Usage in Business**

Warren discussed the value of data collection and usage in modern business. He emphasized that knowing how to use data effectively is currently the most valuable asset. He advised Stacy to start transcribing her phone calls to gather valuable data, even if she doesn't have Zoom or Google Meet. Warren also discussed the importance of detailed descriptions of their clients, problems they solve, and the methods used to solve those problems. He encouraged all participants to create a project with detailed information and to refine it with more transcripts. He also mentioned the possibility of using AI for data refinement.

## **Creating Conversations With Chat GPT**

Warren instructed the team on how to create a new conversation in the project using Chat GPT, even when they forgot to record the transcript. He demonstrated how to start a voice memo, use voice to text on the phone, and type questions to gather useful information from the call. He also showed how to upload a transcript from a literal call. The team is expected to follow these instructions to update their prospecting project.

## **Effective Networking With Chat GPT**

Warren emphasized the importance of networking and prospecting effectively, using data about the person to better serve them. He demonstrated how to use Chat GPT to analyze past conversations and provide insights to help improve future interactions. He also explained how to use Chat GPT to refine a niche or business focus. Warren encouraged the team to try these strategies and seek help if needed through the office hours calls. He also mentioned the use of transcripts from calls and the need to upload them into Chat GPT projects for analysis.