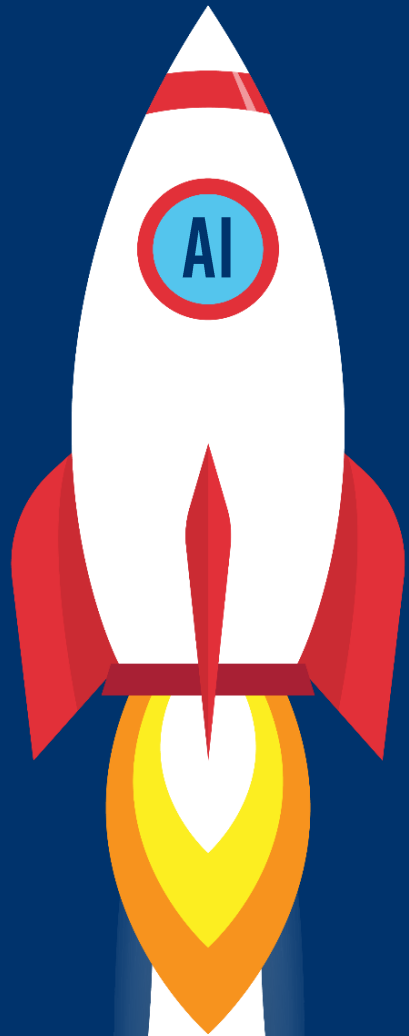


AGENTIC AI PILOT GUIDE FOR ECONOMIC DEVELOPERS

# How to Launch Your First Agentic Prospecting Pilot in 60 Days

A practical roadmap for economic development teams ready to move from AI curiosity to working agentic workflows covering:

- Trade show prospecting
- BR&E expansion monitoring
- Ongoing signal-based attraction



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SCORECARD



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# ABOUT THIS GUIDE

The biggest reason EDO teams don't act on AI isn't skepticism. It's the absence of a clear starting point. This guide provides that starting point: a structured 60-day roadmap for launching your first agentic prospecting pilot, paired with practical worksheets, checklists, and a tool-selection framework you can use immediately.

The roadmap covers three use cases that represent the highest-value, lowest-friction entry points for agentic AI in economic development:



### Trade Show Preparation

Time-bounded, output-focused, and easy to evaluate against your existing process



### Ongoing Signal-Based Prospecting

Continuous monitoring that surfaces warm targets before they show up in RFPs.



### BR&E Expansion Signal Monitoring

Connecting retention relationship data to early expansion intelligence

## HOW TO USE THIS GUIDE

Work through the 60-day roadmap sequentially the first time. The steps build on each other.

Skipping straight to outreach drafting without completing the signal definition and scoring steps is the most common reason pilots fail.

Use the worksheet at the back to document your decisions as you go.

The output of this guide is a working pilot and a documented methodology you can repeat and scale.

## BEFORE STARTING

### A NOTE ON READINESS

This guide assumes your organization has a CRM or contact database with at least a basic prospect list, and at least one staff member with the capacity to spend 2-3 hours per week on setup during the first 30 days.

If your prospect data lives entirely in spreadsheets, spend two weeks cleaning and consolidating it before running this roadmap.

Agentic AI is a force multiplier—it amplifies the quality of what's already there.

# 60-DAY PILOT AT A GLANCE

Phase	Days	Key Output	Who Leads?
1. Define target signals	1-10	Signal definition document	BD lead + director
2. Build signal monitoring workflow	11-25	Live monitoring pipeline	Tech-comfortable staff
3. Test and refine lead scoring	26-35	Calibrated scoring criteria	BD lead
4. Generate and review outreach drafts	36-50	Reviewed draft queue	BD staff
5. Send, track, and measure	51-60	Pilot performance summary	BD lead + director

## APPLYING THE ROADMAP ACROSS USE CASES

The five steps above apply to all three use cases covered in this guide. What changes between them are the signal types you define in Step 1, the monitoring scope you set up in Step 2, and the outreach framing you configure in Step 4.

The table below shows how each use case maps to the same framework.

Use Cases	Primary Signals	Target List Scope	Outreach Angle
<b>Trade show prep</b>	Hiring activity, recent news, product launches	Show exhibitor list filtered by criteria	Pre-show meeting request, community value proposition
<b>Signal-based prospecting</b>	Job postings, permits, funding rounds, expansion announcements	50-200 target companies in priority sectors	Timely outreach tied to specific expansion signal
<b>BR&amp;E expansion signal monitoring</b>	Employment changes, facility activity, leadership transitions	Existing business inventory in your community	Proactive retention visit or expansion conversation

# 60-DAY ROADMAP IN DETAIL

## STEP 1 | DEFINE YOUR TARGET SIGNALS

DAYS 1-10

**WHAT YOU'RE DOING:** Before any tool gets configured, document what a warm prospect actually looks like for your community. This is the instruction set you hand to the agent, and it's worth more time than most teams give it.

### KEY QUESTIONS TO ANSWER:

- Which industries and subsectors are you targeting?
- What company size range (employees, revenue) qualifies a target?
- What signals suggest a company is in growth or expansion mode?
- What geography should signals come from (headquarters, facilities, hiring locations)?
- What signals disqualify a company (recent layoffs, facility closures, wrong ownership structure)?

### COMMON SIGNAL TYPES FOR EDO PROSPECTING:

Signal Types	What It Indicates	Source
<b>Hiring surge in ops/facilities roles</b>	Potential new location or expansion	Job boards, Indeed, ZoomInfo
<b>New facility permit filing</b>	Active construction or fit-out	Local permit databases, CoStar
<b>Product line announcement</b>	Capacity expansion likely	PR Newswire, company news
<b>Series B/C funding round</b>	Scaling tech/life sciences company	Crunchbase, PitchBook
<b>Leadership hire (VP Real Estate/Ops)</b>	Location decision in progress	Job-posting intelligence
<b>Employment change at existing facility</b>	Expansion or contraction signal	State employment data, WARN notices

**Note:** We have combined all these signal types into our ProspectEngage® AI prospects module.



### KEY OUTPUT

A one-page signal definition document that lists your target industries, company criteria, signal types you're monitoring, and signal types that disqualify a prospect. This becomes the prompt foundation for your agent.

## STEP 2 | BUILD YOUR SIGNAL MONITORING WORKFLOW

DAYS 11-25

### WHAT YOU'RE DOING:

Choose your platform and configure a workflow that monitors your defined signals across your target company list. Start narrow and build out from there.

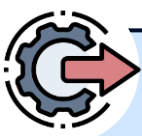
### PLATFORM SELECTION:

See page 10 of the [Tool Selection section](#) for a full breakdown. For most EDOs, the fastest path to a working pilot is:

Your Situation	Recommended Starting Point
<b>Already on Microsoft 365</b>	Power Automate + Claude or ChatGPT API
<b>Want a no-code agent builder</b>	Relevance AI or Claude Cowork
<b>Already using Zapier</b>	Zapier AI Agents
<b>Small team, minimal setup</b>	Lindy or Claude Cowork
<b>Technical staff available</b>	n8n, Make, Claude Code, or Codex

### STEP 2 SET UP CHECKLIST:

- Choose your monitoring platform
- Connect to at least one signal source (news feed, job posting aggregator)
- Upload or connect your target company list (start with 50-100 companies)
- Configure signal triggers based on your Step 1 definitions
- Set up notification routing to your CRM or a review queue
- Run a test pass and confirm signals are surfacing



#### KEY OUTPUT

Start with one industry vertical and one or two signal types. A narrow workflow that works reliably is more valuable than a broad one that produces noise.

## STEP 3 | TEST AND REFINE YOUR LEAD SCORING CRITERIA

DAYS 26-35

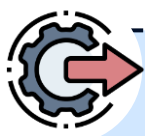
### WHAT YOU'RE DOING:

Run the workflow for 7-10 days and evaluate what surfaces. This is the calibration phase, which is the step most teams skip, and the reason most pilots drift toward noise.

### SCORING DIMENSIONS TO DEFINE:

- Are the companies being flagged actually good fits for your community?
- Are the signals relevant, or are you getting false positives?
- Is the right decision-maker being identified for each company type?
- Are there signal types that consistently produce low-quality leads?
- Are there signal types that are consistently missing good targets?

Dimension	Weight (suggest)	Your Criteria ( <i>fillable</i> )
<b>Industry Fit</b>	High	
<b>Company Size</b>	High	
<b>Signal Strength</b>	High	
<b>Geographic Expansion History</b>	Medium	
<b>Decision-Maker Accessibility</b>	Medium	
<b>Competing Location Risk</b>	Low	



### KEY OUTPUT

Treat the first batch of outputs as a calibration exercise, not a finished product. An agent configured once and never reviewed will drift. Build in a 20-minute weekly review of what surfaced and why.

## STEP 4 | GENERATE AND REVIEW DRAFT OUTREACH

DAYS 36-50

### WHAT YOU'RE DOING:

Configure the outreach drafting layer and review the outputs carefully before anything goes to a prospect. This is where the LLM API connection earns its place.

### WHAT THE AGENT NEEDS TO GENERATE GOOD DRAFTS:

- The specific signal that triggered the flag (the hiring surge, the permit, the funding round)
- The company's relevant profile data (industry, size, current locations)
- The right contact name and title
- Your community's most relevant value proposition for this company type
- Your tone and voice guidelines (formal/conversational, length, call to action)

### DRAFT REVIEW CHECKLIST:

- Is the signal reference accurate and specific?
- Is the tone appropriate for a first-touch outreach from a public-sector organization?
- Does the community value proposition connect to the company's actual situation?
- Is the ask clear and low-friction (a call, not a site visit commitment)?
- Would you send this if you'd written it yourself?



#### KEY OUTPUT

Review 10-15 drafts before sending anything. The edits you make in this review serve as refinements to your prompt instructions, improving every draft that follows. Keep a running document of what you changed and why.

## STEP 5 | SEND, TRACK, AND MEASURE

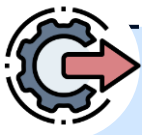
DAYS 51-60

## WHAT YOU'RE DOING:

Send the reviewed outreach, track outcomes separately from your standard campaigns, and produce a simple performance summary at the end of the pilot.

## METRICS TO TRACK:

Metric	How to Measure	Benchmark to Beat
<b>Email Open Rate</b>	Email platform analytics	Your typical cold outreach open rate
<b>Response Rate</b>	Manual tracking or CRM	Your typical cold outreach response rate
<b>Meeting Conversion</b>	CRM pipeline tracking	Your typical meeting-from-outreach rate
<b>Signal-to-Send Time</b>	Time from flag to outreach sent	Your current manual process time
<b>Pipeline Generated</b>	Active projects from pilot contacts	Baseline from comparable period



## KEY OUTPUT

You don't need a perfect measurement framework. You need enough data to answer one question: Is the output quality good enough to justify scaling this? Most teams that run this pilot honestly answer yes.

# WHICH PLATFORM IS RIGHT FOR YOUR EDO?

The right tool depends on your existing tech stack, staff capacity, and how quickly you need a working pilot. This guide is not a ranking. It's a decision framework. Use the questions below to narrow your choice, then match to the platform profiles that follow.

## START HERE: 3 QUESTIONS

### 1 What is your team's technical comfort level?

<b>Very low</b>	▶	Lindy or Zapier AI Agents
<b>Low to moderate (comfortable learning new software)</b>	▶	Relevance AI, Power Automate, or Make
<b>Moderate to high (comfortable with APIs and workflow logic)</b>	▶	n8n, Copilot Studio, or Hermes Agent
<b>High (developer available)</b>	▶	CrewAI, LangChain, AutoGen, Codex, or Claude Code/Cowork

### 2 What software does your organization already use?

<b>Microsoft 365 (Teams, Outlook, SharePoint)</b>	▶	Power Automate + LLM API or Copilot Studio
<b>HubSpot</b>	▶	HubSpot AI Agents
<b>Zapier already in stack</b>	▶	Zapier AI Agents
<b>Airtable for prospect management</b>	▶	Airtable AI
<b>Claude Pro or ChatGPT Pro subscriptions</b>	▶	Codex or Claude Code/Cowork
<b>No strong existing stack</b>	▶	Relevance AI, Lindy, Hermes Agent, or Claude Code/Cowork

## 3 What is your primary use case for the pilot?

<b>Trade show prep and outreach</b>	▶	Relevance AI, Clay + outreach tool, Power Automate, Hermes Agent, Codex, or Claude Code/Cowork
<b>Continuous signal monitoring</b>	▶	Relevance AI, n8n, Power Automate, or Hermes Agent
<b>BR&amp;E expansion signals</b>	▶	Power Automate, n8n, HubSpot AI Agents, or Hermes Agent
<b>Inbox management and response drafting</b>	▶	Lindy or Hermes Agent
<b>Data enrichment for prospecting</b>	▶	Clay, Codex, or Claude Code/Cowork

## PLATFORM COMPARISON

Platform	Type	Skill Level	Best EDO Use Case	Cost Entry Point
<b>Lindy</b>	AI executive assistant	Very low	Inbox monitoring, signal flagging, and reply drafting	Free tier available
<b>Perplexity Enterprise</b>	AI research agent	Very low	Industry cluster monitoring, monthly business development intelligence briefs	Paid plan
<b>HubSpot AI Agents</b>	CRM-native AI	Low	Nurture workflows, lead prioritization for HubSpot users	HubSpot subscription
<b>Zapier AI Agents</b>	No-code automation + AI	Low	Trigger-based enrichment, scoring, follow-up for Zapier users	Included in Zapier plans
<b>Airtable AI</b>	Database + workflow + AI	Low to moderate	Pipeline management, briefing memo generation, outreach queues	Included in Airtable
<b>Clay</b>	Data enrichment	Low to moderate	Prospect list enrichment feeding outreach agents	Paid tiers
<b>Copilot Studio</b>	Low-code agent builder	Low to moderate	Autonomous agents inside Microsoft 365 ecosystem	Included in Microsoft 365
<b>Relevance AI</b>	No-code agent builder	Low-moderate	Signal monitoring, scoring, outreach drafting pipelines	Free tier available
<b>Make</b>	Visual workflow builder	Moderate	Cross-platform automation, CRM integrations	Free tier available
<b>Power Automate + LLM API</b>	Workflow + AI via API	Moderate	CRM-triggered drafting, and research summaries (Microsoft 365 shops)	Included in Microsoft 365
<b>Claude Code/Claude Cowork</b>	Coding agent in terminal/IDE and Cowork to help with document creation	Moderate to high	Building scripts, fixing code, creating local automations, and helping technical staff ship AI pilots and Cowork to build documents such as briefs, and perform industry analysis, review exhibitor lists, etc.	Paid plan (API usage will apply) Tends to use more tokens than other models
<b>Codex</b>	Coding agent + local/cloud development assistant	Moderate to high	Building internal tools, data cleanup scripts, CRM helpers, dashboards, AI workflow prototypes, and developer-ready specs	Included in ChatGPT Pro plans (API usage will apply)

Platform	Type	Skill Level	Best EDO Use Case	Cost Entry Point
<b>n8n</b>	Open-source workflow + AI	Moderate to high	Custom pipelines, self-hosted options, strong AI agent support	Free (self-hosted)
<b>Hermes Agent</b>	Agent harness Persistent local operator	High	Always-on agents for briefs, RFP monitoring, prospect research, recurring reports, file workflows, and custom EDO skills	Open-source (model and infrastructure costs apply)
<b>OpenClaw</b>	Open-source personal agent	High	Local autonomous agent for tech-comfortable staff; experimental	Free (API costs apply)

# DEFINE YOUR TARGET SIGNALS

Complete this fillable worksheet before configuring any tools. The answers become the instruction set for your agent. The more specific you are here, the better your pilot will perform.

**Target industries (be specific—not just “manufacturing” but “food processing” or “precision machining”):**

*List 2-4 specific subsectors*

**Target company size range:**

*e.g., 50-500 employees, \$10M-\$200M revenue*

**Geographic scope for signal monitoring:**

*e.g., Companies headquartered in Northeast US, companies with facilities within 300 miles*

**Signal types to monitor (check all that apply and add notes)**

- |  |  |
|--|--|
| <input type="checkbox"/> Hiring surge in operations/facilities roles       | <input type="checkbox"/> New facility permit filings   |
| <input type="checkbox"/> Product line or capacity announcements            | <input type="checkbox"/> Funding rounds ( <i>specify stage</i> ):  |
| <input type="checkbox"/> Leadership hires (Real Estate, Ops, Supply Chain) | <div style="border: 1px solid #ccc; width: 230px; height: 20px; margin-left: 10px;"></div>   |
| <input type="checkbox"/> Trade publication coverage of expansion plans     | <input type="checkbox"/> Employment changes at existing facilities   |
|  | <input type="checkbox"/> Other: <div style="border: 1px solid #ccc; width: 270px; height: 45px; display: inline-block; vertical-align: middle;"></div> |

Notes:

## Disqualifying signals (What removes a company from consideration?)

*e.g., Recent layoffs, facility closures, private equity ownership in exit phase*

## Your community's top 3 value propositions by industry type:

*e.g., For food processing: water access, cold storage infrastructure, and agricultural supply chain proximity*

## Initial target company list (source and size):

*e.g., 80 companies from ProspectEngage database, filtered by SIC code and revenue*

# PILOT LAUNCH READINESS

Work through this checklist before moving from Step 2 to Step 3. If you can't check off most of the items in a section, spend more time on that phase before proceeding.



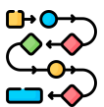
## DATA READINESS

- Target company list is consolidated in one place (CRM, database, or structured spreadsheet)
- Contact records include at minimum: company name, industry, employee count, primary location, one named contact
- Duplicate companies have been removed or merged
- Target industries and company criteria are documented (worksheet complete)
- Your community's value propositions are written down by industry type



## TOOL SETUP

- Platform selected and account created
- Signal sources connected (at least one: news feed, job aggregator)
- Target company list uploaded or connected to the platform
- Signal triggers configured based on Worksheet definitions
- Notification routing confirmed (signals go to the right person/queue)
- Test run completed, and signals are surfacing correctly



## WORKFLOW DOCUMENTATION

- Signal-to-review process is documented (who sees what, when)
- Human review step is confirmed before any outreach is sent
- CRM logging process is defined (who logs what after a draft is sent)
- Escalation process defined for high-priority targets
- Weekly review calendar invite is set for the monitoring phase



## OUTREACH READINESS

- Prompt instructions written for the outreach drafting agent
- Tone and voice guidelines documented
- Sample outreach reviewed and edited before live use
- Tracking setup confirmed (open rates, responses logged separately)
- Staff member assigned to review queue with clear SLA (e.g., review within 48 hours)



## GOVERNANCE

- No outreach goes out without human review and approval
- Data privacy policy reviewed for API usage with external LLM providers
- CRM write-access for the agent is scoped correctly (can it create duplicates?)
- Sensitive information (incentive details, confidential project data) excluded from agent inputs
- Team briefed on what the agent does and does not do autonomously

# EVALUATING YOUR PILOT'S PERFORMANCE

Complete this fillable scorecard at the end of Day 60. Compare your pilot results against your baseline (how your typical manual outreach process performs) to determine whether to scale the approach.

## PILOT SUMMARY

Pilot use case (trade show/signal-based/BR&E):

Platform used:

Date range:

Number of companies in the target list:

Number of outreach emails sent via agent-assisted workflow:

## PERFORMANCE METRICS

Metric	Your Pilot Result	Baseline (manual)	Difference	Notes
Email open rate (%)				
Response rate (%)				
Meeting conversion rate (%)				
Signal-to-send time (days)				
Cost per meeting booked (\$)				
Pipeline generated (\$)				
Staff hours saved per week				

## PILOT EVALUATION

What worked well?

What needs adjustment before scaling?

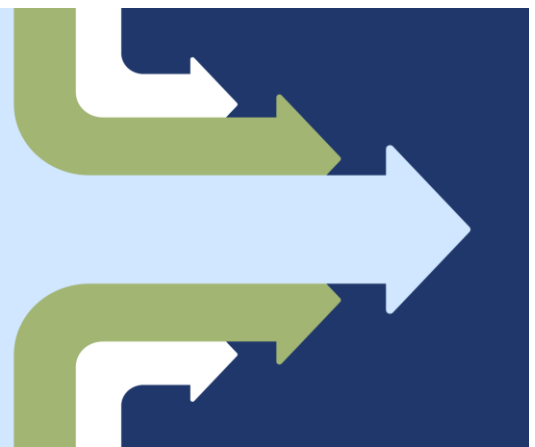
Which signal types produced the highest-quality leads?

Recommendation: Scale, refine, or pause?

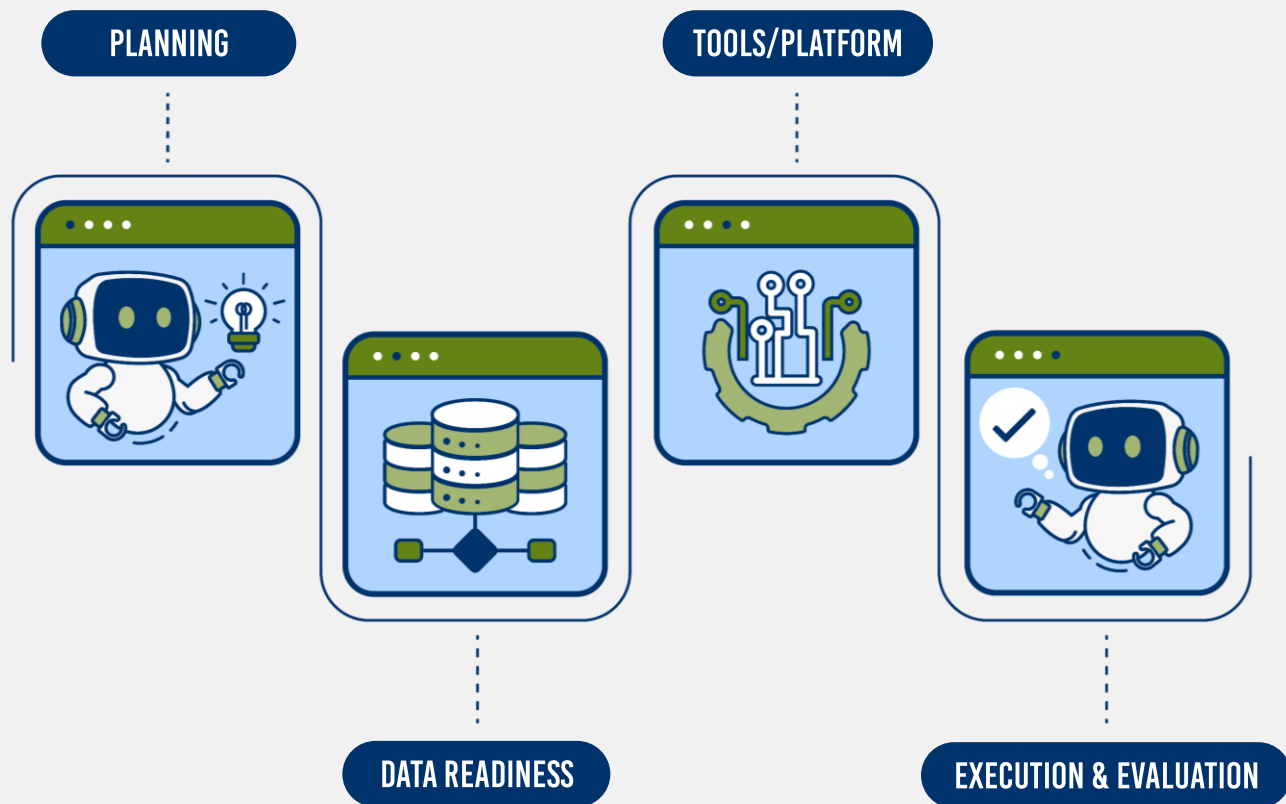
## NEXT STEPS AFTER A SUCCESSFUL PILOT

Expand your target company list, add a second signal type, configure ongoing monitoring (not just pre-show), and present the performance scorecard to leadership as the business case for continued investment.

The 60-day pilot is the proof of concept. What comes next is the program.



# Do you have questions about implementing agentic AI in your economic development program?



Camoin Associates offers AI workshops and organizational strategy sessions for EDO teams. **Contact us to discuss your organization's situation.**

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