

AI – Your New Business Development Partner



Chicago 1 & 9 Joint Meeting
November 19, 2025

Before We Begin

- 1) Expanded virtual session
- 2) Deck will be made available

Let's Create Your AI Business Development Partner

Let's Create Your AI Business Development ~~Partner~~ Assistant

Building Your AI Biz Dev Assistant

jdt

1

The Foundation

2

Assistant

3

Assistant

4

Assistant

Building Your AI Biz Dev Assistant

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**Give your Biz Dev Assistant Purpose,
Intelligence & Context**

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Purpose, Intelligence & Context

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You are my Business Development AI Assistant. Your job is to help me research prospects, prepare for conversations, and move opportunities forward, based on a deep understanding of my business. First, read and absorb everything about my business that I provide below. Store it as your long term context for this project. You should treat this as your “employee handbook” for working with me.



Your responsibilities:

1. Understand my business
 - Build a clear picture of what I do, who I serve, and how I help.
 - Learn my offers, pricing style, and typical engagement structures.
 - Learn how I talk, the phrases I use, and what I care about.
 - Understand what a good prospect looks like for me and what a bad fit looks like.
2. Use a BD lens for future work
 - When I give you a company, person, or situation, always think: “How could this become a real opportunity?”
 - Tie your answers back to my services, my ideal clients, and the way I like to work.
 - Flag any risks, red flags, or misalignment that would make someone a weak fit.
3. How I want you to respond
 - Be concise, clear, and specific.
 - Prefer structured sections and bullets over long paragraphs.
 - If something is unclear or missing, tell me exactly what you need.
 - When helpful, restate my goal in your own words before you answer.

Below this prompt I will paste detailed information about my business. Read it carefully, then:

1. Summarize my business in one short paragraph.
2. List bullet points for:
 - Ideal clients
 - Services I offer
 - Problems I solve
 - What a good opportunity looks like
3. Ask me up to five clarifying questions that would help you support my business development work even better.

Here is the information you will receive from me. Expect as much detail as I can provide for each:

- | | |
|--|--|
| <ul style="list-style-type: none"> ● Company name and short description ● My role and how I spend my time ● Ideal client profiles (industries, size, roles, locations) ● Problems and situations I help with ● Services and offers (including typical formats and timelines) ● Pricing style and any important constraints | <ul style="list-style-type: none"> ● Past clients and short case examples ● Testimonials or proof points ● My sales process and typical stages (from first intro to signed deal) ● Common objections I hear and how I respond ● My tone of voice and writing style ● Boundaries, non-negotiables, and red flags ● Tools I use (CRM, email, calendar, recording tools, AI tools) |
|--|--|

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Biz Dev Assistant

Purpose, Intelligence & Context

2

Prospect Research
Assistant

Research this company as a potential client for my advisory practice. Use clear sections. Summaries only. No filler. Here is the website: [URL].

Use my profile and context from this project to guide the analysis. Focus on the information I need for a first or second business development conversation.



1) Company Overview

- What the company does
- How they describe themselves
- A plain language summary that removes jargon

2) Business Basics

- Estimated employee count
- Estimated revenue range if possible
- Office locations
- Years in business
- Public data from directories or listings
- Leadership and team

3) Company Leadership

- Roles and responsibilities
- Short bios based on public information
- Any notable past companies or achievements

4) Market Presence

- Main competitors
- How this company positions itself against those competitors
- Any obvious strengths or weaknesses in their positioning

5) Digital Presence

- Website quality and structure
- Blog or resource activity
- Social media activity
- LinkedIn presence

6) Services or Product Lines

- List of core offerings
- Short descriptions of each
- Pricing tiers if visible
- Signals of higher margin or higher demand areas

7) Ideal Customers

- Primary industries
- Typical customer size
- Types of problems the company claims to solve
- Any patterns in their case studies or portfolio

8) High Value Insights for Me

- Three to five observations about where I could help
- Problems or gaps they are likely facing
- A few questions worth asking in the next conversation”

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Assistant

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Deep Analysis
Assistant

Using everything you learned about this company from the prior research, perform a marketing strategy scan. Build a single marketing strategy checklist that is specific to this company's size, industry, and business model. Bring the checklist high level and practical.



1) Include the major categories that matter for a healthy marketing function, such as:

- Marketing and messaging
- Website clarity and structure
- Lead capture and conversion paths
- Content strategy
- Social marketing
- SEO fundamentals
- Social media presence
- Customer growth or loss studies
- Brand consistency
- Analytics and tracking basics

2) Evaluate the company against that checklist in a second round of research based on publicly available information. For each checklist item, give one of three ratings:

- Thumbs up, they appear strong
- Neutral, unclear or mixed
- Thumbs down, they appear weak or missing

If you cannot find the information, write "Information not publicly visible."

- Add short notes for each rating
- Give at least one reason why
- Reference what you found
- Include links if relevant

Finish with a short summary

- List the top strengths you discovered
- List the top gaps or opportunities that stand out

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Conversation Prep
Assistant

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Conversation Prep Assistant

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Using all prior research and the marketing maturity pass, prepare me for a first or second conversation with this company.



1) Give me a short briefing

- What I should know walking into the conversation
- The three most important details about their business
- The three most important signals from the maturity pass

2) Give me conversation starters

- Five to seven questions I can ask that are specific to their business
- Keep them factual and tied to what you found
- No sales language
- Make each question simple and direct

3) Give me learning questions

- Five questions that help me understand their goals, processes, or challenges
- These should help me figure out if a deeper conversation is worth it

4) Give me observation based comments

- Three short comments I can use to show that I did my homework
- Tie each comment to a fact or pattern you identified

5) Give me possible next step openings

- Two or three simple ways to continue the conversation if it makes sense
- No pitch language
- Keep it exploratory

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Relationship
Management Assistant

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Deep Analysis
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Scope of Work /
Proposal Assistant

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Scope of Work /
Proposal Assistant

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Service & Execution
Assistant*

Thought Questions

How are you using AI today? Is it mostly quick one off questions or do you have persistent threads or projects tied to specific business functions?

How do you research prospects now? What is your current process before a first or second meeting? Could you see AI helping you do that research faster or better?

How do you capture conversations with prospects? Are you using any tools to transcribe or summarize calls? If not, what would change if you had clean notes and action items after every key meeting?

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Join an expanded discussion

**Thursday, December 4
8:30–9:30 am**

www.jdtadvisors.com/provisors

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