From prototype to first clients.

Find the right people. Start useful conversations. Show what you learned.



Course 5

connectea-course-hub.vercel.app/course-5/

SCAN OR CLICK TO OPEN

Course 4 editorial illustration reused; fictional scene.

Build a path from interest to evidence

01

0-40: assignment walkthrough and evidence clinic.

02

40-90: customer, offer, lead research; then 10-minute break.

03

100-160: CRM, outreach, capture. 160-180: portfolio review.

Apply this to your own project.

What are you actually being asked to do?

01 Build a testable digital prototype for a real opportunity.

02 Test an assumption with people and use what you learn.

03 Submit your evidence and your individual reflection.



Assignment workbook

Course 5 / assignment workbook

SCAN OR CLICK TO OPEN

Visual reused from Course 4; editorial illustrations depict fictional scenes.

Eight required portfolio items

01 Opportunity	02 Concept
03 Live site + GitHub	04 Testing
05 Iterations	06 Tool choices
07 Your reflection	08 Ad + copy

Assignment workbook

Course 5 / assignment workbook

SCAN OR CLICK TO OPEN

Team prototype. Individual evidence and reflection.

ASSESSMENT

Two assessed parts. Both must pass.

20%

ACTIVE PARTICIPATION

80%

PROTOTYPE PORTFOLIO

At least 5.5 in EACH part.

Leaderboard points do not change the grade.

Explain the opportunity and your choice

01 Who has the problem? What happens when it is unsolved?

02 What is your riskiest assumption about that customer?

03 Why is this prototype a useful way to test it?



DISCUSS > TRY > CHECK > REFLECT

Visual reused from Course 4; editorial illustrations depict fictional scenes.

ITEM 3

A prototype must let someone do something

01 Give a specific user a specific task.

02 Make the action and its outcome visible.

03 Share a working live link and the matching repository.



LEGIT AGENTIC

legit-agentic.vercel.app

SCAN OR CLICK TO OPEN

Visual reused from Course 4; editorial illustrations depict fictional scenes.

ITEM 4

What counts as testing evidence?

01 Record the participant context, task, date, and method.

02 Capture what happened: completion, friction, or feedback.

03 Explain what the observation means for your assumption.



Assignment workbook

Course 5 / assignment workbook

SCAN OR CLICK TO OPEN

Visual reused from Course 4; editorial illustrations depict fictional scenes.

ITEM 5

Make the before-and-after reasoning visible

OBSERVATION

Two testers missed the enquiry action.

CHANGE

Move it beside the product details.

RETEST

Check whether new users finish the task.

Make the evidence > decision > check visible.

Fictional example. A planned retest must not be presented as completed.

Explain your tools and your own contribution

01 Tools: why this choice fits the task, limits, and budget.

02 Contribution: what you personally did and checked.

03 Reflection: what changed your mind and what comes next.



Assignment workbook

Course 5 / assignment workbook

SCAN OR CLICK TO OPEN

Visual reused from Course 4; editorial illustrations depict fictional scenes.

ITEM 8

Your ad should lead somewhere useful

01 Name the audience, value promise, and next action.

02 Include the creative link and the advertisement copy.

03 Make the landing page deliver the promise in the ad.



Assignment workbook

Course 5 / assignment workbook

SCAN OR CLICK TO OPEN

Visual reused from Course 4; editorial illustrations depict fictional scenes.

Replace a claim with an observation

OBSERVATION

Two testers missed the enquiry action.

CHANGE

Move it beside the product details.

RETEST

Check whether new users finish the task.

Make the evidence > decision > check visible.

Fictional example. A planned retest must not be presented as completed.

PORTFOLIO CHECKPOINT

Find your biggest missing piece

01 Open your portfolio and inspect all eight items.

02 Choose the gap that most weakens your evidence.

03 Name an owner and the next action to close it.



Assignment workbook

Course 5 / assignment workbook

SCAN OR CLICK TO OPEN

Visual reused from Course 4; editorial illustrations depict fictional scenes.

Who needs this enough to respond?

01 Choose one segment, one problem, and one situation.

02 Distinguish the user from the person who pays.

03 Offer a small, credible next step.



DISCUSS > TRY > CHECK > REFLECT

Visual reused from Course 4; editorial illustrations depict fictional scenes.

TEAM EXERCISE / 8 MIN

Write your offer in one sentence

01

For [specific audience] struggling with [problem] ...

02

... we offer [useful outcome] through [solution].

03

First step: [interview, test, enquiry, or pilot].

Apply this to your own project.

TWO ROUTES

Match acquisition to your project

01

Business clients: research organisations and relevant roles.

02

Consumer projects: invite voluntary signups or user tests.

03

Both: explain fit and choose an appropriate contact route.

Apply this to your own project.

Where could the right people be?

01 Start with introductions, referrals, and existing enquiries.

02 Inspect relevant public business sites and directories.

03 Use communities with permission; offer a clear signup.



DISCUSS > TRY > CHECK > REFLECT

Visual reused from Course 4; editorial illustrations depict fictional scenes.

A lead needs a reason to be on the list

EXAMPLE STUDIO

SOURCE	Fictional classroom scenario
OBSERVED	Publishes weekly articles
UNKNOWN	Need for outside support
NEXT ACTION	Ask about the current process

01 Source: where did you find the person or organisation?

02 Evidence: what observable fact suggests a possible fit?

03 Unknown: what must you verify before reaching out?



Get the template

Fictional record. An observation and an inference are different kinds of evidence.

Ask for evidence, not invented contacts

01 Use only these sources. Quote the fact supporting fit.

02 Return source, observation, uncertainty, and next question.

03 Mark unknowns. Never guess an email or buying intent.



All classroom links

Course 5 / resources

SCAN OR CLICK TO OPEN

Visual reused from Course 4; editorial illustrations depict fictional scenes.

Build five useful starting records

01

Find five candidates, or a relevant opt-in recruitment route.

02

For each, record evidence of fit and what is unknown.

03

Peer-check the sources and reject weak matches.

CRM template

Course 5 / CRM template

SCAN OR CLICK TO OPEN

BREAK / 10 MIN

Bring back one candidate worth discussing

01 What makes this person or organisation relevant?

02 What evidence do you have?

03 What is the smallest sensible next step?



All classroom links

Course 5 / resources

SCAN OR CLICK TO OPEN

Visual reused from Course 4; editorial illustrations depict fictional scenes.

A CRM remembers the relationship

IDENTIFIED

Example Studio

Verify the need

REVIEWED

Example Shop

Draft an invitation

REPLIED

Example Academy

Agree a test date

Every active record: an owner + a dated next action.

Teaching diagram with fictional organisations; not an Attio screenshot.

TOOL MAP

Choose tools by the job they do

FIND

DistroNow + Treg

Candidates and source evidence

ORGANISE

Attio / HubSpot / folk / Twenty

Contacts and next actions

CHECK

LEGIT AGENTIC + Ora

Website readiness

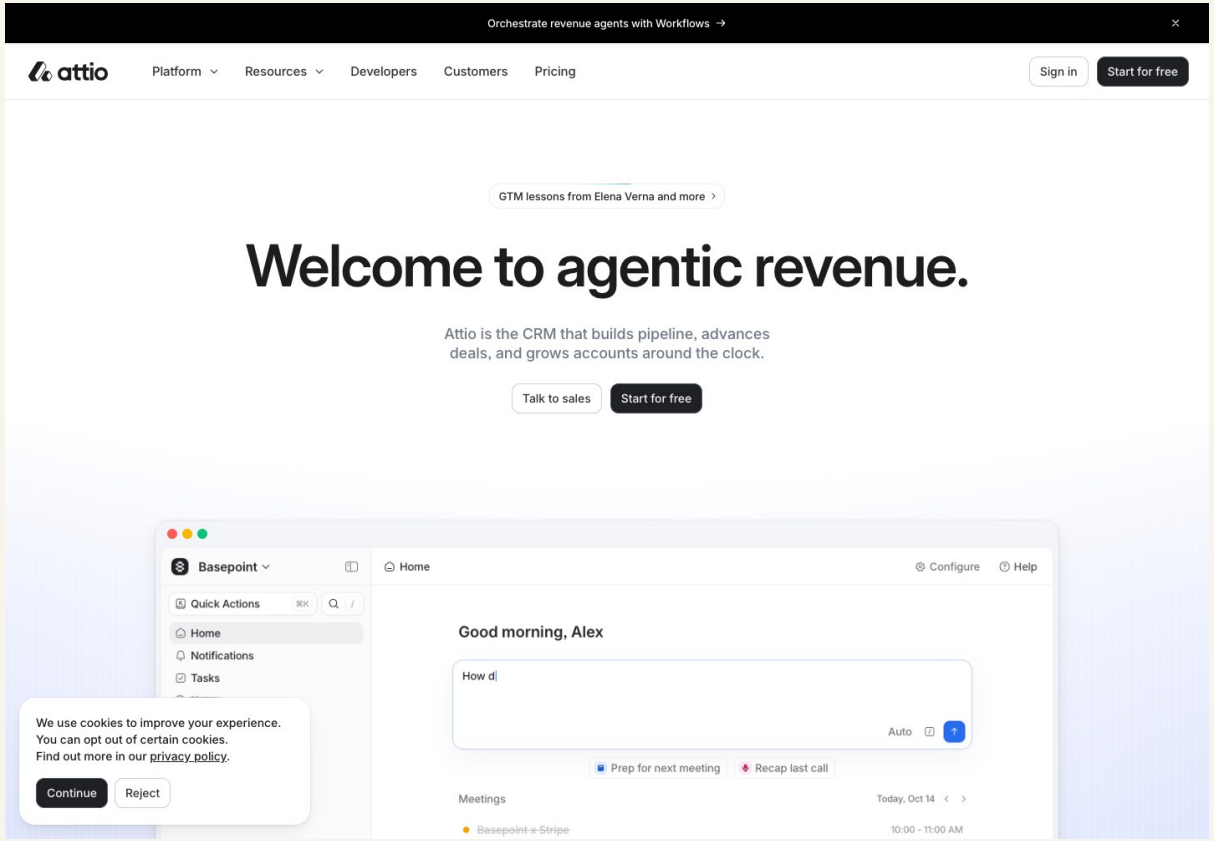
All classroom links

Course 5 / resources

SCAN OR CLICK TO OPEN

Choose one CRM for the workshop; other tools support different parts of the journey.

Attio: start with a small shared pipeline



01 Free plan: up to 3 seats and 50,000 records.

02 Create one list with stage, owner and next action.

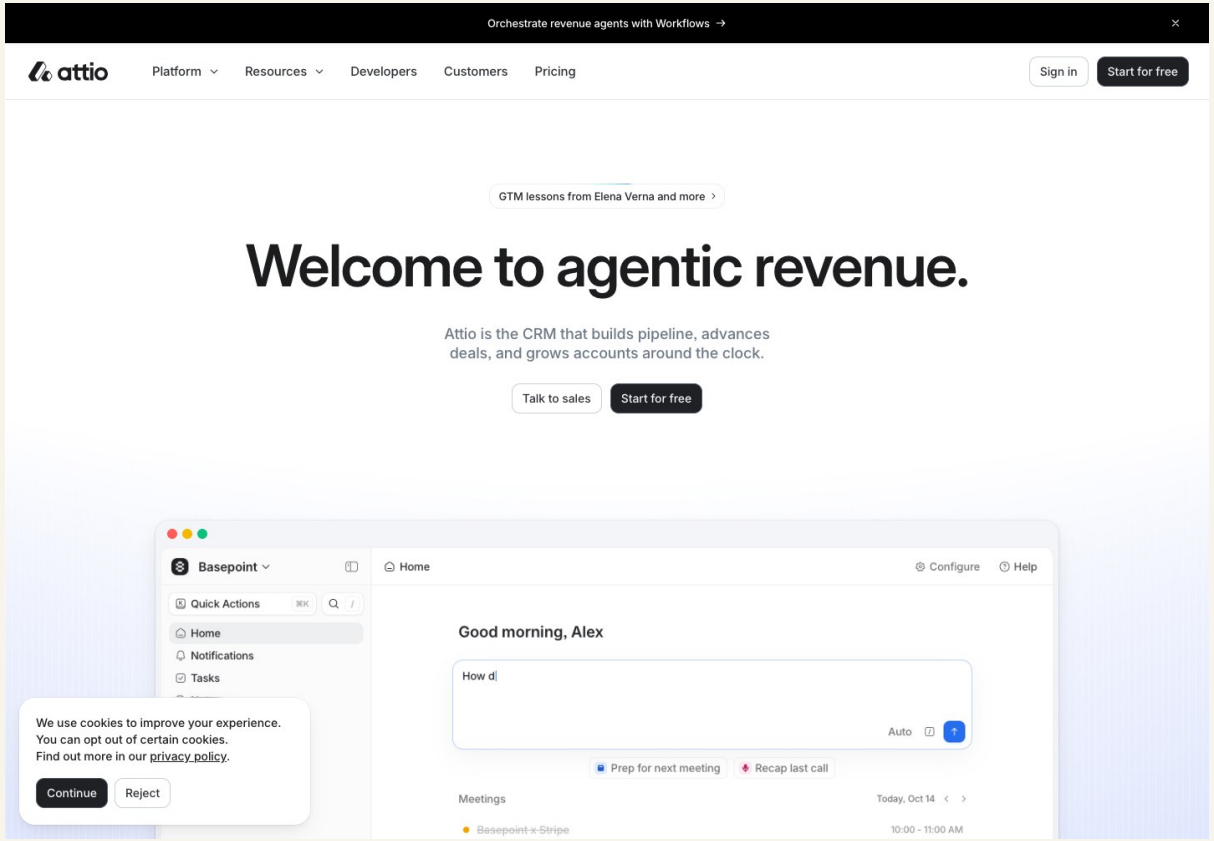
03 Keep advanced AI and automation optional.

Attio

attio.com

Attio official public website, captured 5 Oct 2026. QR opens the named resource.

Import, review, and move one record



01 Prepare five company records with unique domains.

02 Map CSV columns, preview, then check the saved data.

03 Update one stage and next action; export your evidence.

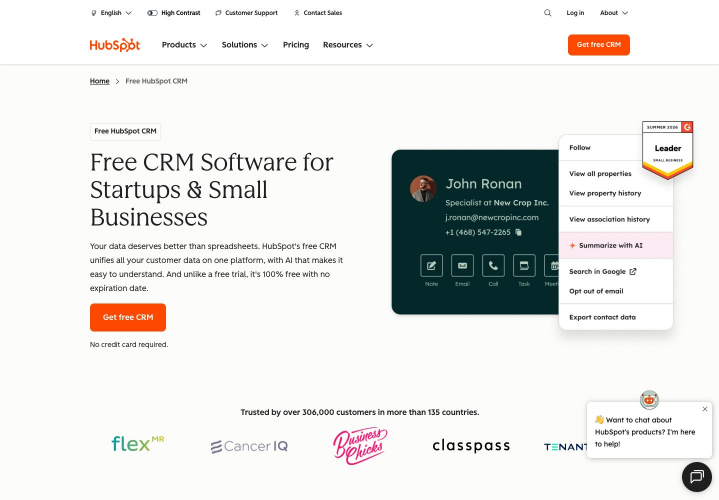
Attio Academy

attio.com / Help / Academy

Attio official public website, captured 5 Oct 2026. QR opens the named resource.

HubSpot or folk: choose for your workflow

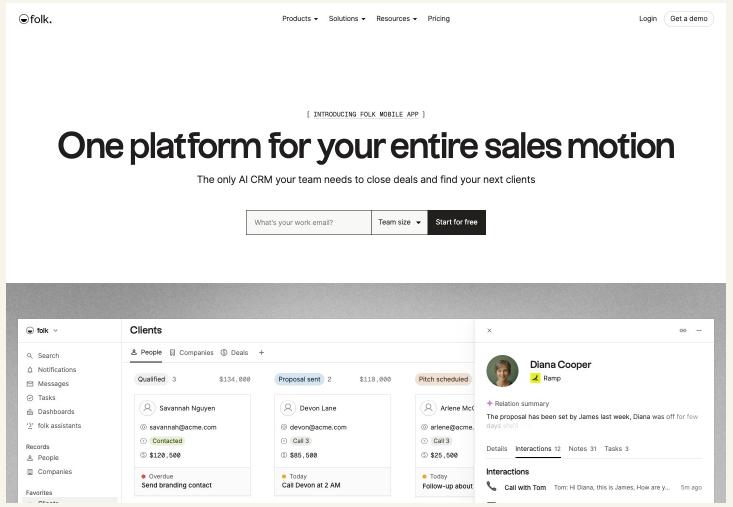
HubSpot CRM



Free CRM: 2 users / 1,000 contacts

hubspot.com/products/crm

folk

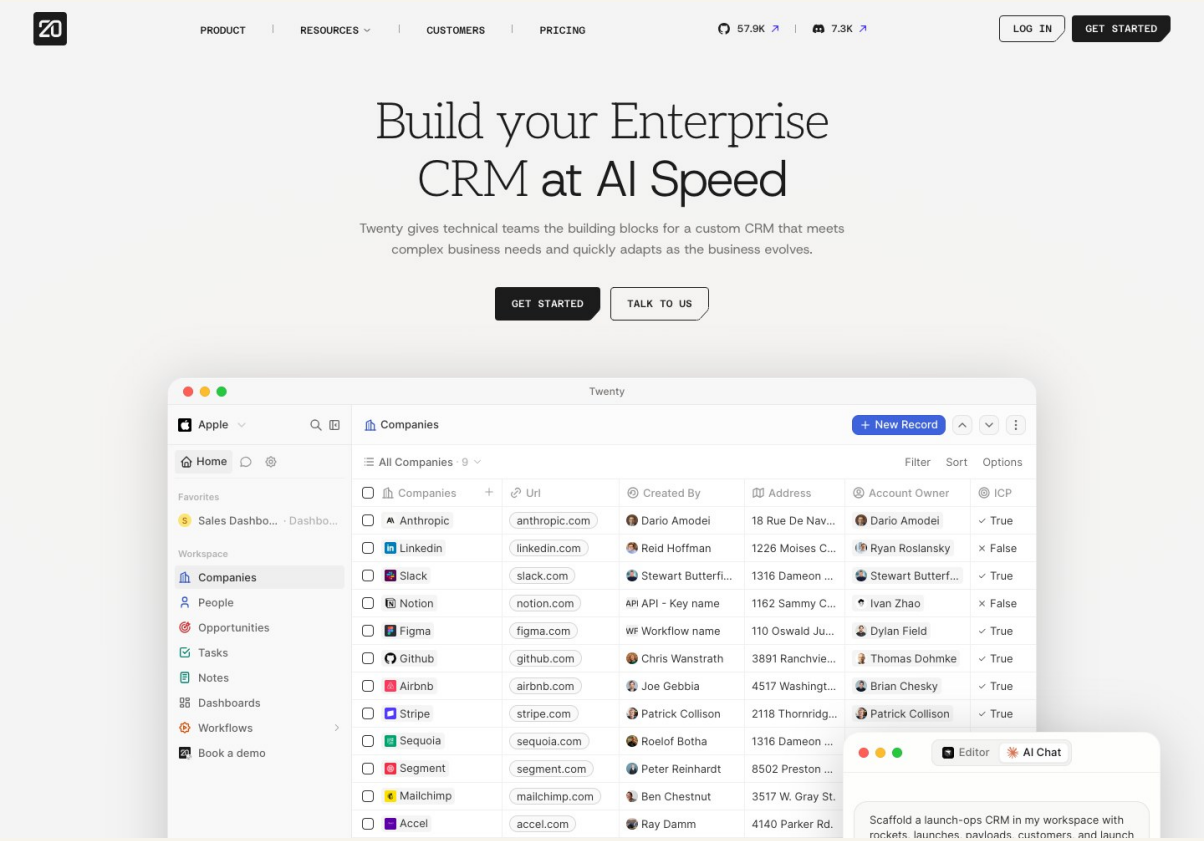


Relationship CRM / 14-day trial

folk.app

Official public product pages. Plans checked 5 Oct 2026; recheck before choosing.

Twenty: explore a customisable CRM



01 Open-source CRM with cloud and self-hosting options.

02 Cloud: 30-day trial; Pro $9/user/month billed yearly.

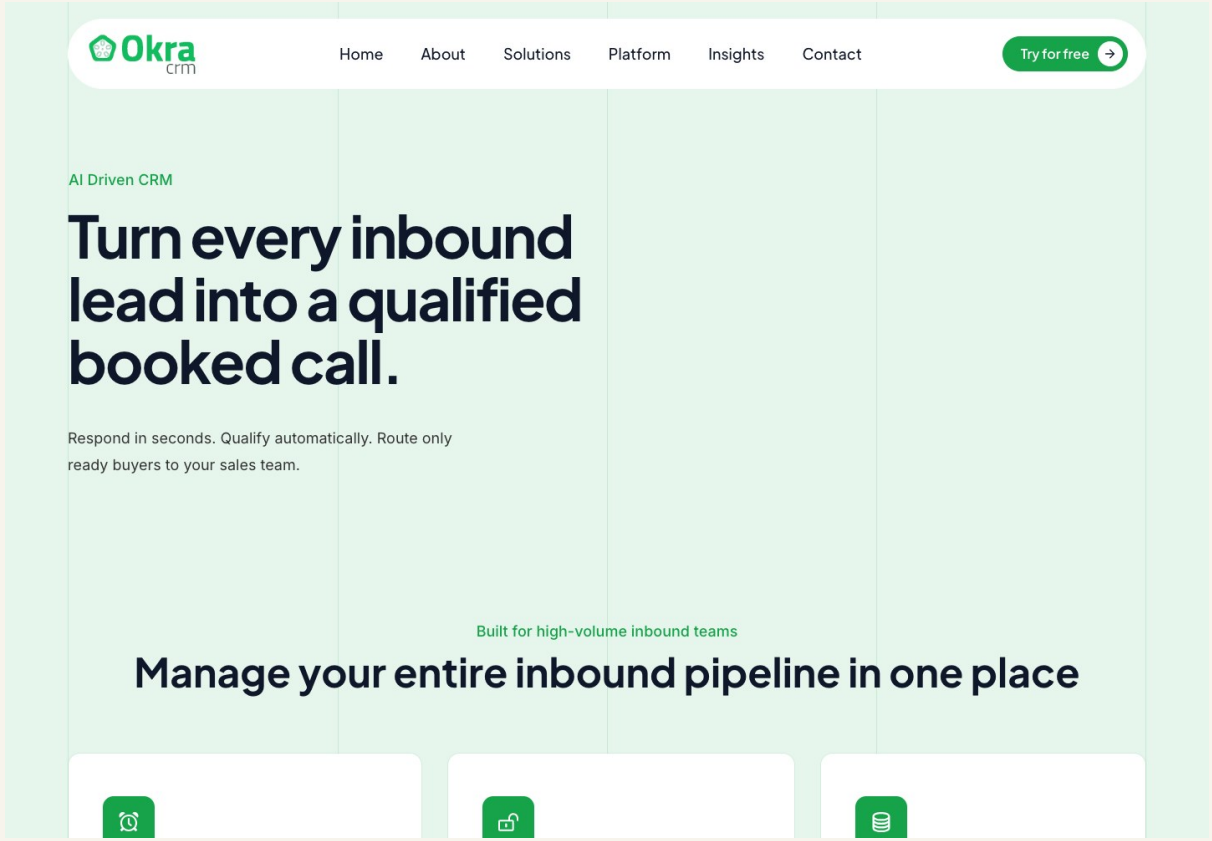
03 Use an existing workspace for the optional demo.

Twenty

twenty.com

Twenty official public website, captured 5 Oct 2026. QR opens the named resource.

Okra CRM focuses on inbound enquiries



01 Vendor describes AI response, qualification and booking.

02 Classroom access and pricing still need confirmation.

03 Use it as a workflow discussion until verified.

Okra CRM

okracrm.com

Okra official public website, captured 5 Oct 2026. QR opens the named resource.

Demonstrate the complete lead journey

REVIEW	VERIFY	DRAFT	RECORD
Buyer fit	Demo result	Human check	Reply + meeting

Use the fictional /leads-finder workspace. Simulated results are practice evidence only.

DistroNow demo guide

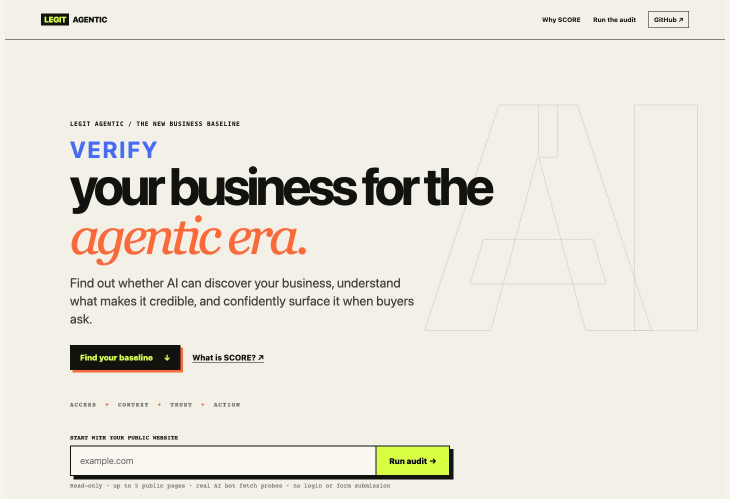
Course 5 / tools / DistroNow demo

SCAN OR CLICK TO OPEN

DistroNow repository demo. Live data-provider compatibility still requires checking.

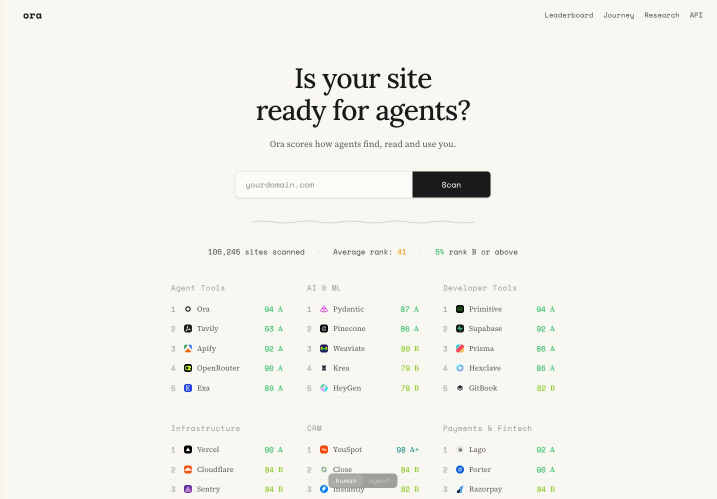
Use LEGIT AGENTIC or Ora to find friction

LEGIT AGENTIC



legit-agentic.vercel.app

Ora



ora.ai

Website-readiness checks do not prove customer demand or AI recommendations.

PIPELINE

Move a record when something actually happens

IDENTIFIED

Example Studio

Verify the need

REVIEWED

Example Shop

Draft an invitation

REPLIED

Example Academy

Agree a test date

Every active record: an owner + a dated next action.

Teaching diagram with fictional organisations; not an Attio screenshot.

MINIMUM RECORD

Every active lead needs a next action

EXAMPLE STUDIO

SOURCE	Fictional classroom scenario
OBSERVED	Publishes weekly articles
UNKNOWN	Need for outside support
NEXT ACTION	Ask about the current process

01 Identity, source, evidence of fit, and unknowns.

02 Stage, owner, last interaction, next action, due date.

03 Outcome and contact preference, including do not contact.



Get the template

Fictional record. An observation and an inference are different kinds of evidence.

Make the list usable by someone else

01 Import or copy your researched records.

02 Assign each active record an owner and next action.

03 Hand it to a teammate: can they explain what to do next?



Attio classroom lab

Course 5 / tools / Attio lab

SCAN OR CLICK TO OPEN

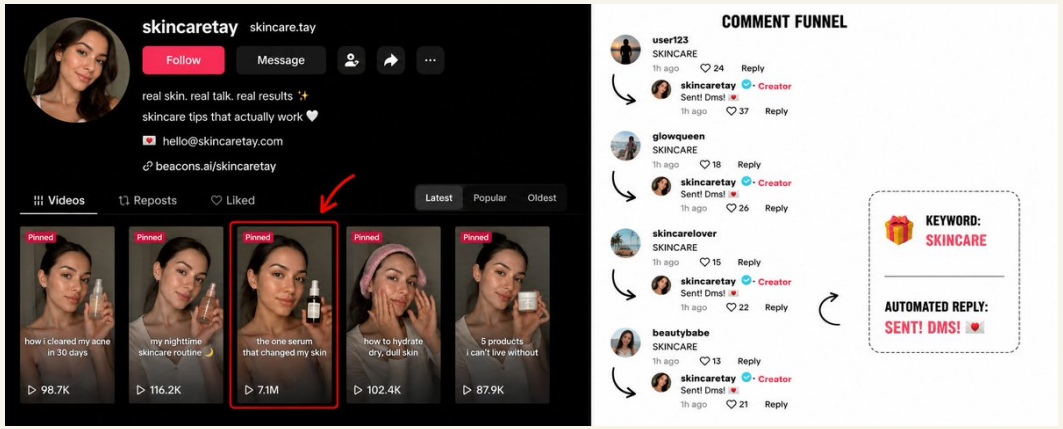
Visual reused from Course 4; editorial illustrations depict fictional scenes.

Give someone a reason to answer

01 Relevant observation: something you actually verified.

02 Useful offer: a clear outcome, without invented claims.

03 Small ask: one question or a short conversation.



DISCUSS > TRY > CHECK > REFLECT

Visual reused from Course 4; editorial illustrations depict fictional scenes.

Learn about what already happens

01 When did you last experience this problem?

02 How did you handle it, and what was difficult?

03 What would make trying a different approach worthwhile?



DISCUSS > TRY > CHECK > REFLECT

Visual reused from Course 4; editorial illustrations depict fictional scenes.

Respect the answer, including no

01 Log the response and agree the next step if there is one.

02 For this exercise, make at most one unanswered follow-up.

03 Stop on refusal and mark the record accordingly.



DISCUSS > TRY > CHECK > REFLECT

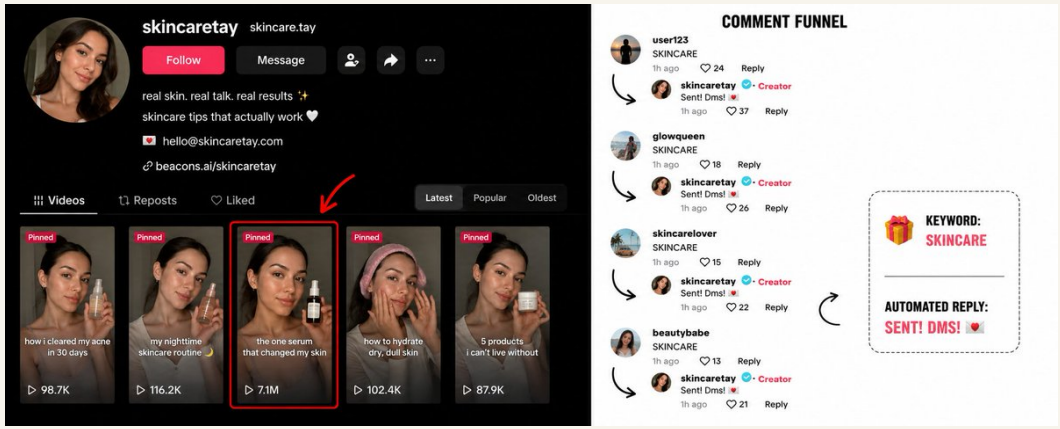
Visual reused from Course 4; editorial illustrations depict fictional scenes.

Write three drafts and review one closely

01 Personalise with relevant verified facts.

02 Remove vague promises, false familiarity, and pressure.

03 Ask a teammate: would you understand why this was sent?



Assignment workbook

Course 5 / assignment workbook

SCAN OR CLICK TO OPEN

Visual reused from Course 4; editorial illustrations depict fictional scenes.

Connect the advertisement to the next step

01 Ad or website > clear action > short enquiry form.

02 Form > saved record > responsible owner.

03 Owner > dated follow-up task > visible outcome.



DISCUSS > TRY > CHECK > REFLECT

Visual reused from Course 4; editorial illustrations depict fictional scenes.

Check the handoff, not just the button

01 Submit dummy data and locate the saved result.

02 Try missing fields, a duplicate, and a failed handoff.

03 Confirm who follows up and what the visitor is told.



Assignment workbook

Course 5 / assignment workbook

SCAN OR CLICK TO OPEN

Visual reused from Course 4; editorial illustrations depict fictional scenes.

Count each step separately



Reply rate = 2 / 5. A booking is not a completed test.

Fictional numbers for learning. Record actual outcomes and the observation period.

Decide what the evidence would change

01 We believe [segment] experiences [problem].

02 We will test [offer] through [appropriate channel].

03 If [signal], we will [decision]; otherwise investigate [why].



DISCUSS > TRY > CHECK > REFLECT

Visual reused from Course 4; editorial illustrations depict fictional scenes.

Where does this work go?

CUSTOMER RESEARCH	>	Opportunity + concept
CONVERSATIONS + TESTS	>	Testing evidence
DECISIONS + CHANGES	>	Iterations + reflection

Your tools serve the eight existing portfolio items.

No ninth submission item and no new sales quota.

A complete evidence chain

OBSERVATION

Two testers missed the enquiry action.

CHANGE

Move it beside the product details.

RETEST

Check whether new users finish the task.

Make the evidence > decision > check visible.

Fictional example. A planned retest must not be presented as completed.

Say what you did and what you learned

01 I contributed [specific work] and checked [evidence].

02 I expected [assumption], but observed [actual result].

03 I changed [decision]; next I will test [remaining risk].



Assignment workbook

Course 5 / assignment workbook

SCAN OR CLICK TO OPEN

Visual reused from Course 4; editorial illustrations depict fictional scenes.

What makes a portfolio stronger?

01

Functional prototype and basic evidence establish the base.

02

Clear reasoning and evidence-led changes strengthen it.

03

Robust validation and mature reflection support excellence.

Apply this to your own project.

PEER REVIEW / 8 MIN

Can another person follow your evidence?

01 Open the live site, repository, and advertisement links.

02 Trace one observation to a change and its check.

03 Identify one missing item and one unclear claim.



Assignment workbook

Course 5 / assignment workbook

SCAN OR CLICK TO OPEN

Visual reused from Course 4; editorial illustrations depict fictional scenes.

Resolve these before you submit

01

No sales yet? Show honest testing, learning, and iteration.

02

Worked as a team? Explain your individual contribution.

03

No reply? Record it; investigate fit, channel, and offer.

Assignment workbook

Course 5 / assignment workbook

SCAN OR CLICK TO OPEN

LEAVE WITH A NEXT STEP

One customer. One question. One action.

01 A credible customer hypothesis and a usable CRM.

02 A tested capture flow and a seven-day experiment.

03 An honest portfolio with a clear next improvement.



All classroom links

Course 5 / resources

SCAN OR CLICK TO OPEN

Visual reused from Course 4; editorial illustrations depict fictional scenes.