YOU COMMENTED "CLEDRA." HERE IT IS. · PART ONE: THE SYSTEM · PART TWO: THE VA PLAYBOOK

The Cledra Playbook

How to get leads, start conversations, and train a VA to find
your right people on LinkedIn, every day, while you do the work that pays.

Yesterday I got on a call with Cledra, one of our Brick by Brick clients. She told me the number of clients she needs to live the life she wants. From that one number we did some backwards math, landed on how many of the right people she needs to talk to, and then built the plan to go talk to them without her doing all the finding herself. I liked it enough that I couldn't sleep, so I went live from Napa and walked through it. This is the whole thing, in order, so you can run it for yourself.

Two things before we start. Nothing here works if you're not willing to actually talk to people, on LinkedIn, on Zoom, in voice notes. The VA finds. You talk. And the whole system depends on one number you have to be honest about, so we start there.

STEP 1

Start with your freedom number

What do you need to be making a month to feel free? Not revenue. Take-home. Profit. The industry loves to talk revenue, and I did too for years, and it burned me. If you optimize for revenue you're not thinking about your team, your expenses, the cool things you want to do for clients, or yourself. This is the first season in a long time we've run the business on profit, and it changed how we play the game.

Get the monthly number. Then get the why. I've had people tell me they want a million dollars a month, and when I ask why, they don't have an answer. When it gets hard, and it will, a number with no why is the first thing you quit on. A number with a deep why is the thing you keep pressing for.

From the freedom number, back into clients. Freedom number divided by what a client pays you per month is the number of clients you need. For Cledra that came out to 16 new clients.

STEP 2

Reverse the number

Now we do back-of-the-envelope math. I go very conservative on purpose. Even the worst salesperson closes about 30% of sales conversations. The founder, the face, the person who owns the offer, closes a lot more than that. But we plan on 30% so the plan survives a bad month.

16	53	300	10
clients Cledra needs (from her freedom number)	sales calls: 16 divided by 0.3	right people to talk to, after reply and connection rates	people a day for a month, and the list is built

Your version: take your client number and divide it by 0.3. That's your sales calls. Then divide your sales calls by the share of conversations that turn into a call (for Cledra, 53 calls out of roughly 300 conversations). That's how many of the right people you need to talk to. Divide by the days you're giving it and you have a daily number. The calculator that came with this does it for you; type in your numbers and it hands back the daily one.

> *When Cledra and I saw 53, we both said the same thing. She already talks to hundreds of people. She just needed to talk to 53 of the right ones. A number is never scary once it's a plan.*

STEP 3

Why LinkedIn, and not anywhere else

People ask me all the time why I'm so bullish on LinkedIn. Because I like to make money, and income follows impact, and LinkedIn tells me more about whether I can actually help someone than any other platform on earth. Where they went to school. What they do. What industry, what title, what they're posting, whether they're trying to grow. Instagram, TikTok, and Facebook give me photos and a couple of clues. LinkedIn gives me a compass. If I need to find 300 of the right people, that's where I go find them.

STEP 4

Find your signals (record yourself doing this)

Cledra asked me the best question on the call: "How would you actually find the right people?" Here's the process. Open Zoom or Loom and hit record. Pull up the LinkedIn profiles of your best clients, the ones you'd clone if you could. Then pull up a few people who aren't clients yet but look perfect. Go through 10 of them and talk out loud about what you see. Not for anyone else. For the transcript. That transcript becomes your VA's training in the next step.

What I look for (so you can see what "signals" means)

These are mine. Yours will be different. The point is that they're visible on a profile without a conversation.

- **A clear headline and a clear offer.** One line, in plain words, that says who they help and how. If I can't tell what they do in five seconds, they're probably not ready for what we do.
- **They're active, and they're trying to grow.** Posting most days. A featured section with real links. Follower counts that show they've been at it (Cledra is at 11,000, Dr. Pam near 50,000; both are signs of consistency, not the goal itself).
- **They're an expert doing their own thing.** A long run in corporate or in a practice, then their own business. Jeannie was a marketing exec for 20 years before she went out on her own. Dr. Pam is a physician building her own line of business. These are the people we help best.
- **Coach, consultant, or an expert launching a coaching thing.** That's our lane. Yours might be a title (SVP, VP, Chief People Officer), a company (Amazon, a hospital system), or a life situation you can see from the outside.
- **Profile photo, banner, and the basics done.** Small thing. Tells me they take this seriously.
- **Soft signals.** Most of our folks went to college. There are a couple of regions we pull a lot of great people from. I don't filter on these, but they're clues.

> *A guy DM'd me this week who isn't a client. Corporate catering. Growing on LinkedIn, simple offer ("meals that connect teams, impress clients, and close deals"), active, good photo. Perfect fit, and I knew it in ten seconds because I'm clear on my signals. That's the whole skill.*

> **Don't have a VA yet? Do this yourself.** Nobody will do it better than you. But record every session anyway. When you're ready to hand it off, you'll have twenty transcripts to build the playbook from instead of starting from zero. I build every process in my business with the frame that I might hand it off one day, whether or not I ever do.

STEP 5

The prompt (paste this, then paste your transcript)

I talk to Claude out loud (I use Whisper Flow), so this is a spoken prompt, not a polished one. Use it as-is or in your own words. The two parts that matter: ask for principles first, and tell it to ask you questions before it builds.

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Hey Claude, I am trying to make a playbook for a VA to help me find the right people to talk
to. I've gotten clear on how many clients I need to close, how many sales calls I need to
have, and how many of the right people I need to talk to to get those sales calls. I want to
leverage LinkedIn to find the right people.

Below is a transcript of me going through LinkedIn profiles of some of our clients that are
awesome (I want to find more of them) and some people who are not yet our clients. I was
talking through the signals that tell me this is probably a good client for us.

Make this a full playbook for a VA who comes in knowing nothing about my business and nothing
about LinkedIn, but can follow this playbook and find me the right people to talk to every
day.

I believe in principles over actions. At the beginning of the playbook, list the principles
this VA should always follow. Then get into the process.

Ask me any questions you need to make this a really robust playbook.

[PASTE YOUR TRANSCRIPT HERE]
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Claude will come back with questions. Answer them like a boss, not like a prompt-writer. Here's how I answered on the live:

- **What is the VA allowed to do, and where does the handoff start?** They source only. They find the person. The conversation is mine.
- **What's the daily sourcing quota?** Ten. Ten right people a day.
- **Hard disqualifiers?** No other ghostwriters. No dormant accounts. No job seekers. Nobody already in our world.
- **Where does the playbook and the daily list live?** A Google Sheet. Simple.

Why principles first: this is a leadership lesson, not a prompting trick. Early on, the feedback I gave our team was "I don't like this thumbnail, I don't like this script." It stifled them. When I switched to principles ("does this follow Stop, Stay, Share?") they got more creative, not less, and they didn't need me in the room. Same with a VA. Give them the principle and they can handle the case you didn't write down.

STEP 6

What the playbook should look like

Claude built mine in a few minutes. It opened with principles I'd said on the call and a couple I hadn't, and they were right. Yours will have your signals in it, but the skeleton should look like this:

The principles (these were the ones at the top of mine)

- **We are hunting for the right person, not for more people.** Ten perfect fits beat a hundred maybes.
- **Income follows impact.** We only reach for people we can actually help.
- **Trust is earned in pebbles and lost in buckets.** One spammy touch costs more than ten good ones earn.

- **No evidence, no entry.** Every person on the list has the signals written next to their name. If you can't say why they fit, they don't go on the sheet.
- **Read behaviors, not titles.** What they do on LinkedIn tells you more than what's in front of their name.
- **The daily number never lowers the bar.** Ten a day is the quota. Ten right people is the standard. If you only found six, log six.
- **Get 1% sharper every week.** Which signals kept showing up in the ones that replied? Add them. Which ones didn't matter? Drop them.

The process (what the VA does every day)

- **Source.** Search LinkedIn by the signals in the playbook. Start from your existing best clients' networks and the people engaging with your posts, then widen.
- **Check against the disqualifiers.** Dormant account, job seeker, competitor, already a client or already in the community: skip.
- **Log.** Name, profile link, the two or three signals that qualified them, and the date, in the Google Sheet. No evidence, no entry.
- **Hand off.** Ten links a day to you. If you want them to send the connection request, the message is one line and it's the same line every time ("Great to be connected"). Nothing in your voice. The second someone replies, it's yours.
- **Weekly review.** Fifteen minutes. Which sourced people replied, booked, or bought? Sharpen the signals.

STEP 7

The handoff rule (this is where people blow it)

The VA does not have the conversation. Ever. If you hand your voice to a VA to start messages, you will tank it, and you've felt this from the other side: you know in one line when a message is automated or written by someone's VA. The reason I do the talking is simple. It has the highest ROI of anything I do, and I refuse to lose trust in this market, because once trust is gone it gets harder for everyone to transact.

So the split is: the VA finds, you talk. Voice notes, video messages, real replies, a Zoom call. If you want to be lazy in this game and outsource all of it, go ahead. You won't get much from it. I'm only talking to the people willing to get in the field.

Hiring the VA

I use onlinejobs.ph for most of ours. You'll get hundreds of applicants. A couple of dollars an hour to maybe $10 an hour is normal for this kind of sourcing work. Have Claude write the job post too: "I'm looking for someone to find the right people on LinkedIn from a playbook I'll give you." Even at three hours a day, that's a list being built for you while you sleep or while you fulfill for the clients you already have.

> **The whole system in five lines**
>
> Freedom number (take-home, not revenue) → clients you need.
> Clients ÷ 0.3 → sales calls. Sales calls ÷ your conversation-to-call rate → right people to talk to.
> Record yourself reviewing 10 profiles → paste the transcript into Claude with the prompt above → VA playbook.
> VA sources 10 right people a day into a Google Sheet. No evidence, no entry.
> You have every conversation. Trust in pebbles, lost in buckets.

This is one way to monetize on LinkedIn, not all of them. We go through a lot more inside Brick by Brick. But if you do this one thing (get your number, find your signals, hand off the finding, keep the talking) you'll be ahead of most people who say they want clients from LinkedIn and never go talk to anyone. There's enough out there for all of us to win. Go talk to your 10 today. Talk soon, Kasey.

PART TWO

The VA playbook Claude built on the live

This is the actual playbook that came back a few minutes after I pasted the transcript. I've left it as Claude wrote it (with one prospect's name taken out) so you can see what "good" looks like. Yours will have your signals, your lanes, your disqualifiers. Copy the shape, not the content.

The actual playbook Claude built for our VA on the live. Copy the shape, swap in your signals.

Start here

Your one job: find **10 of the right people on LinkedIn every day** and hand them to Kasey with proof of why they're right.

You find them. Kasey talks to them. That line never moves.

Ten a day is 300 in a month. Three hundred of the *right* conversations is the whole ballgame. The conversations become calls, and the calls become clients. Which is why 10 right people beats 50 maybes every single time. Nobody is counting how many profiles you opened. We're counting how many of the people you handed over were worth a conversation.

You do not need to know anything about our business or about LinkedIn to start. This playbook will teach you both. Read it once all the way through before your first day.

Part 1. Principles

Rules run out. Principles don't. You will open a profile this playbook doesn't cover, and you'll have to make a call. When that happens, come back here.

- **We are hunting for the right person, not for more people.** Every name you add is a real human Kasey is going to spend her time on. Time is the one thing we can't buy more of. Protect it like it's yours.
- **Income follows impact.** Only log someone we can genuinely help. If you look at a profile and can't imagine them being better off after working with us, they're not our person, no matter how impressive they look.
- **Trust is earned in pebbles and lost in buckets.** You never write as Kasey. You never send a message, a connection request, a comment, or a like from her account or on her behalf. One spammy touch undoes a hundred good ones. Sourcing is your lane. Stay in it.
- **No evidence, no entry.** For every person you log, you must be able to point at the exact thing on their profile that proves they belong. "Feels right" isn't a reason. "Headline says *I help ops leaders stop drowning in busywork*, posted 4 times this week, has a Featured section with a free guide" is a reason.
- **Read behavior, not titles.** A title tells you what someone *is*. Their activity tells you what they're *trying to do*. We want people who are visibly trying to use LinkedIn to grow their business. A perfect title with a dead profile is worth nothing to us.
- **The number never bends the bar.** If you only found 6 real ones today, log 6 and say so in your handoff. That is a good day and an honest report. Padding the list with 4 weak names to hit 10 is the single fastest way to lose this role, because Kasey will waste real hours on those 4 before anyone notices.
- **When you're not sure, park it. Don't guess.** Log it with the status *Not sure, review* and one line on what's giving you doubt. Uncertainty is information. Guessing is noise.
- **Get 1% sharper every week.** Kasey's feedback on your list is the most valuable thing you'll receive. Read it before you start each day. Your job in week 4 should look nothing like your job in week 1. Same task, much better eye.

Part 2. Who we are (60 seconds of context)

Kasey Brown runs **Digital Kairos** and **Brick by Brick (BxB)**, an 8-week cohort program that teaches experts how to build a personal brand on LinkedIn and turn it into real revenue. There's also **The Arena**, an ongoing membership for people who've been through the program.

In plain language: we take people who are genuinely excellent at something (a coach, a consultant, a doctor, a former executive) but who are basically invisible online, and we make them known and paid for what they know.

Why LinkedIn specifically: unlike Instagram or TikTok, LinkedIn tells you who someone is. Their title, their industry, their company, their career history, their education, what they post about. That's not vanity data. It's how we tell, before ever speaking to someone, whether we can actually help them. Your entire job is reading those clues well.

Part 3. Who we're looking for

Picture one person. Someone who has spent 10 to 20+ years becoming genuinely great at something. They've left, or are leaving, the traditional path. They run their own coaching practice, consultancy, or expert business now. They know LinkedIn is where their clients are. They're on there posting, showing up, trying. But they're not getting the return their expertise deserves, and they can feel it.

That's our person. They are **already in the game and already trying.** We are not looking for people who need to be convinced to take LinkedIn seriously. We're looking for people already putting in effort without the system to make it pay.

Who	Why they're a fit
Cledra Gross	Coach and business strategist. Strong headline, ~11K followers, posts daily, Featured links, clearly using LinkedIn to get clients.
Jeannie Ruesch	20 years as a marketing executive, now running her own thing. Clear headline, custom banner, strong Featured section, active.
Dr. Pam	Physician and expert. Nearly 50K followers, visibly using LinkedIn to grow her own line of business.
A corporate-catering founder	*Not a client yet*, and a perfect fit. Growing, active, and a dead-simple clear offer in his headline: he helps teams eat well, impress clients, and close deals.

Notice: different industries, different follower counts, different backgrounds. **What they share is behavior, not category.** Expert + own business + actively working LinkedIn to grow it.

Part 4. The signal checklist

This is the heart of the job. Run every profile through it in this order.

Step 1. Disqualifiers (any one = reject immediately, do not log)

Stop the moment you hit one of these. Don't debate it.

- **Competitor.** Personal branding agency, LinkedIn ghostwriter, content agency, or anyone teaching people how to grow on LinkedIn or get clients on LinkedIn. If their headline sounds like ours, they're out.
- **Dormant account.** No post in the last 30 days. Or no profile photo. Or a default banner *and* a bare job-title headline with nothing else filled in. No signal they're trying.
- **Job seeker or student.** #OpenToWork banner, "Student at…", or a profile that's clearly about landing a role rather than growing a business.

- **Already in our world.** A current BxB or Arena member, a past client, or someone Kasey already has an open conversation with. Check the "Already In Our World" tab in the tracker before you log anyone. This is the most common mistake.

Step 2. Gate checks (all four must be YES)

If even one is a no, don't log them.

- **They run their own thing.** Founder, owner, coach, consultant, advisor, fractional exec, solo expert, or a senior expert visibly building something of their own on the side. If they're a mid-level employee with no independent practice, no.
- **They're active.** Posted at least once in the last 14 days. Check the Activity section on their profile ("Show all activity" → "Posts").
- **They're visibly trying to get business from LinkedIn.** At least one of: a headline that says who they help or what problem they solve; a Featured section; a link to a site, newsletter, or booking page; posts that mention their work, clients, or offer.
- **There's real expertise underneath.** Years of experience, a serious career history, credentials, a book, a notable employer. We help experts. There has to be an expert there.

Step 3. Amplifiers (count them; we want 2 or more)

The more of these, the stronger the lead. Note which ones hit in the tracker.

- Posts most days, not just occasionally
- 5,000+ followers (a real audience already, but see the note below)
- Meaningful engagement on posts: actual comments, not just a few likes
- Complete profile: professional photo, custom banner, full About section, Featured section
- **Corporate exec turned owner.** "20 years at [big company], now founder of…" One of our strongest signals.
- Credentialed: Dr., MD, PhD, JD, CPA, or a recognized certification
- Their content talks about clients, results, transformations, or their offer. They're selling, even if quietly.
- Recent momentum: posting noticeably more in the last 30 to 60 days than before
- Speaker, author, podcast host: already producing, just not converting
- College graduate. **This is a weak signal, never a gate.** Most of our people are, but plenty of great fits aren't. Never reject someone over it.

On follower count: it's an amplifier, never a requirement. Someone with 1,200 followers posting daily with real comments is a far better fit than someone with 30,000 who last posted in March. Effort beats size.

Step 4. The gut check

Before you log them, ask yourself one question: **"Could Kasey genuinely help this person make more money from what they already know?"** If the honest answer is yes, log them. If it's "maybe," mark it *Not sure, review*. If it's no, move on.

Part 5. Where to find them (the daily hunt)

Don't search the same way every day. You'll keep surfacing the same people. Rotate through these five lanes on a weekly schedule.

Day	Lane
Monday	Engagement mining: Kasey's own posts

Day	Lane
Tuesday	Keyword search
Wednesday	Mirror search: off our reference profiles
Thursday	Comment sections: creators our people follow
Friday	Follower overlap + list cleanup

Lane 1. Engagement mining (highest quality, start here)

People who already engage with Kasey's content are the warmest possible source. They know her. They're self-selecting. Go to Kasey's profile → Activity → Posts. Open her posts from the last 30 days, one at a time. Click the reactions count and the comments on each. **Prioritize commenters over reactors.** A comment is a much stronger signal than a like. Open each person's profile and run the Part 4 checklist. Do the same on the posts of our reference clients. Their audiences look like our audience.

Lane 2. Keyword search

Use LinkedIn's search bar, click **People**, and apply filters. Terms to rotate through: executive coach, leadership coach, business strategist, fractional CMO / COO / CFO, leadership consultant, keynote speaker, career coach, healthcare consultant, founder coach, "I help" (with quotes; this pulls headlines written to attract clients, which is exactly the behavior we want), "helping leaders", "former [Fortune 500 company] executive".

Filters: Locations United States (unless told otherwise). Connections 2nd and 3rd+ (skip 1st; Kasey already knows them). **Then sort by behavior, not by list order.** Open each result and check their Activity tab first. If they haven't posted in 30 days, close the tab and move on. That's your fastest filter.

Lane 3. Mirror search

Start from someone we already know is perfect and find their neighbors. Open a reference profile. Look at the "More profiles for you" / "People also viewed" panel on the right. Those people are algorithmically similar, a high-yield pool. Run each through the checklist. When you find a new great fit, use *their* panel next. Keep walking the chain.

Lane 4. Comment sections

Find the big voices our people learn from: creators posting about personal branding, LinkedIn growth, consulting, coaching, or expertise-based business. Open their recent posts and read the comments. The experts commenting thoughtfully on those posts are people actively trying to figure this out. That's our person mid-search.

Lane 5. Follower overlap + cleanup

Look at who follows the creators from Lane 4 and who engages repeatedly across several of them. Repeat engagers are the most invested. Then spend the last 30 minutes of Friday on cleanup: remove duplicates, re-check anything marked Not sure, and read the week's feedback from Kasey.

Hard rules for how you search

- **Never use automation tools, scrapers, bots, or browser extensions** that auto-visit or auto-message. They get accounts restricted and they poison the well. Everything you do is by hand.
- **Never use Kasey's login.** Work from your own LinkedIn account.
- **Never send connection requests, messages, comments, or likes** as part of this work. Not from your account, not from hers. You are sourcing only.
- Viewing profiles is fine and normal. If you're moving fast, LinkedIn may show a "commercial use limit" warning. If that happens, slow down and tell Kasey.

Part 6. Your daily routine (about 90 minutes)

Time	What you do
0:00 – 0:05	Open the tracker. Read Kasey's feedback on yesterday's list. Note anything she rejected and why.
0:05 – 0:10	Check today's lane in the rotation. Open the "Already In Our World" tab so you don't re-log someone.
0:10 – 1:10	**Source.** For each candidate: open profile → check disqualifiers → run the 4 gate checks → count amplifiers → log or move on. Budget ~5 minutes per person you log.
1:10 – 1:20	**Self-audit.** Reread your 10. For each one, say out loud the one-sentence reason they're a fit. If you can't say it cleanly, fix the evidence or drop them.
1:20 – 1:30	Post your daily handoff message (template below).

> **First two weeks are different.** Start at 5 per day, not 10, and get feedback from Kasey every single day. Once your approval rate is consistently above 80%, move to 10 per day. Calibration first, volume second.

Part 7. What to log

Every person goes into the tracker with these fields. The one that matters most is **Why they're a fit**. That's the whole job in one sentence.

Field	What goes in it
Date added	Today's date
Name	Full name as shown
LinkedIn URL	Full profile link
Headline	Copy their headline exactly
What they do	Plain language, 5 to 10 words: "Executive coach for healthcare leaders"
Own business?	Yes / Building it
Last posted	Date of most recent post
Followers	Approximate number
Gate checks	4/4 (if it's not 4/4, they shouldn't be here)
Amplifiers hit	List them: "daily poster, ex-exec, strong Featured, 12K followers"
Why they're a fit	**One sentence with proof.** See examples below.
Source lane	Which lane found them
Status	New / Not sure, review
Kasey's feedback	Leave blank. Kasey fills this in.

A good "why they're a fit": *"20 years as a marketing exec, now running her own consultancy. Posts 4x/week about brand strategy, has a Featured lead magnet and a booking link, ~8K followers with real comments."*

A bad one: *"Seems like a good fit."* (no evidence) · *"Coach with 15K followers."* (a fact, not a reason) · *"CEO at a big company."* (doesn't tell us they're trying to use LinkedIn at all)

Part 8. Your daily handoff

Post this in Slack at the end of each session:

> **LinkedIn sourcing, [date]**
> Logged: [X] of 10
> Lane: [which one]
> Standouts: [1 to 2 names + one line each on why]
> Flagged for review: [any Not sure names + what's giving you doubt]
> Notes: [anything you noticed: a search term that worked, a pattern, a lane that's drying up]

If you logged fewer than 10, say so plainly and say why. That's a normal report, not a bad one.

Part 9. The calibration loop

This is how you get good fast. **Weekly, Kasey reviews the list and marks each person** Approved or Rejected, plus one line on why. **Your job:** read every rejection before you start the next day. Rejections teach you more than approvals do. When you see the same reason twice, write it down. That's a rule this playbook is missing, and we'll add it.

Timeline	Approval-rate target
Week 1 to 2	60%+ (you're learning the eye)
Week 3 to 4	80%+
Ongoing	85%+

If approval rate drops below 70% in any week, stop and ask for a 15-minute call to recalibrate before you keep sourcing. Sourcing the wrong people faster helps nobody.

Part 10. Glossary

- **ICP.** Ideal Client Profile. The specific kind of person we're built to help.
- **Headline.** The line under someone's name. The most revealing 220 characters on LinkedIn. A good one says who they help; a weak one just says their job title.
- **Featured section.** The showcase panel under About. Links, posts, PDFs, videos. Its presence means someone is treating their profile as a storefront.
- **Banner.** The wide image behind the profile photo. A custom one is a sign of intent. The default blue one is a sign of neglect.
- **Activity.** The feed of someone's recent posts, comments, and reactions. Your single best signal source.
- **1st / 2nd / 3rd degree.** Connection distance. 1st = already connected to you.
- **Reactor vs. commenter.** Someone who liked a post vs. someone who wrote on it. Commenters are always the stronger lead.
- **Dormant.** Hasn't posted in 30+ days.
- **Lane.** One of the five sourcing methods in Part 5.

What V2 should decide (after 3 weeks of real data)

Don't solve these now. Let the work tell you.

- **Which lane actually produces approved leads.** Track approval rate by lane and kill the weakest one. One or two lanes will do most of the work.
- **Whether 10/day is the right number.** It depends on how many conversations you can actually carry. If the list is piling up unworked, the bottleneck is you, not sourcing, and the VA should drop to 5/day and go deeper.
- **Whether the amplifier list needs weighting.** After 3 weeks, look at what your approved people had in common versus your rejected ones. The strongest amplifier probably deserves to become a gate check.
- **Whether a second tier is worth keeping.** Right now near-misses get dropped. If you find yourself wishing you had them, add a "warm someday" tab.
- **Whether the VA should also pull one line from the person's recent content** (a post they wrote, a thing they're wrestling with) so your first message has something real to open with. This is the highest-leverage upgrade to the role, and the only reason it isn't in V1 is that it should be earned after calibration is solid.

V1. Ship it, work it, let the rejections teach us what V2 needs.