

The Omnira *Idea* Vault

A memory catalog built from 144 internal-meeting extraction files, July 2025 through August 2026. Every idea the team raised, tested, shelved, or shipped is logged here with its date, its champion, its fate, and its fit against the current vehicle. The current vehicle (2026-08) is Omnira Partners: 90-day embedded CGO engagements for \$2M-\$50M businesses. The engagement stack is a scoped paid audit, a systems install, database reactivation, and credit repair plus funding placement. Every client is routed grow, acquire, or exit. Brokering runs through a 400+ institutional network. Sales is a commission-only rep force. Many ideas below that once needed their own company now fit as moves inside this one offer. Fit lanes used below: audit, install phase, reactivation, capital lane, brokering/network, referral arm, rep platform.

01 Offers and packaging

Consulting for equity

2025-07 (2025-07-29), Trejon. The formal shift away from the pure AI-growth-partner model: source deals, consult owners to prepare for exit in 1-2 years, take equity for the work. Anchored on the claim that only 20 percent of listed businesses ever sell.

FATE executed. It became growth-partner-for-equity (2025-08-08), then the CGO program, then the success-fee advisory work.

FIT TODAY it is the DNA of the current offer. Equity kickers on 90-day engagements keep this alive.

Growth-partner-for-equity program

2025-08 (2025-08-08), Trejon. Shift from selling AI systems to a comprehensive partner model: source the deal, prepare the owner for sale, facilitate acquisition, grant the new owner equity.

FATE evolved into the CGO certification and partner tracks of October 2025.

FIT TODAY absorbed. The embedded CGO engagement is its direct descendant.

The Chief Growth Officer service

2025-09 (2025-09-24 website-cgo-proposal), Sam. First articulation: Omnira provides training, systems, and support to develop partners into growth operators, not just tool users. Formalized the same day as a role plus certification program (2025-09-24 direct-mail-deal-cgo-pricing).

FATE executed. Piloted on real deals (Jarvis at BlackLane, 2025-09-25), built into a 3-tier ladder (2025-10-16), now the core of Omnira Partners.

FIT TODAY this is the current offer. The vault entry exists to mark where it was born: a 34-minute impromptu call.

90-day guaranteed-outcome pilot

2025-07 to 2025-08 (2025-07-29, 2025-08-22), Trejon and Sam. A 90-day trial with guaranteed appointments or listings, priced around \$500 per qualified appointment, deliberately under-promised.

FATE evolved. The 90-day window survived; the appointment guarantee quietly faded as the offer moved upmarket.

FIT TODAY the 90-day engagement length is already standard. The guarantee mechanic could return as an audit-phase risk reversal.

Free 72-hour valuation as the universal door-opener

2025-10 (2025-10-01, 2025-10-06), Trejon. Nine times out of ten the valuation is the best first step. Collect two years of accounts and six months of bank statements, partner with brokers to deliver within 72 hours, then route the seller.

FATE reversed in spirit. The 2026-08-23 venture replaced the free valuation with a paid audit as the foot-in-the-door.

FIT TODAY the speed standard (72 hours) is worth carrying into the paid audit even though free is dead.

Two-path seller funnel (sell now vs build value first)

2025-09 (2025-09-24 mlm-ethics), Sam and Harrison; codified as a decision tree 2025-10-06, Sam. Confidential discussion, valuation, then two paths: connect to buyer or advisor, or run a strategic value-building plan.

FATE executed and durable. It is the routing logic of the 2026-08 outreach script (growing or open to selling).

FIT TODAY identical to the grow-acquire-or-exit routing in the current offer.

Three-lane vertical platform: acquire, optimize, reactivate

2025-09 (2025-09-24 insurance-platform), Sam and Harrison. For the insurance platform they defined three revenue lanes: external client acquisition, internal optimization, database reactivation, priced \$2,500-\$4,000 per month.

FATE evolved. Database reactivation, first named here, became a headline component of the current offer.

FIT TODAY fully absorbed. Reactivation is now a core lane; the three-lane frame still works as audit output structure.

Licensing vs done-for-you segmentation

2025-08 (2025-08-18), Sam and Harrison. Match offer type to buyer capacity: solo advisors get the license, larger orgs get done-for-you.

FATE parked as a rule, but recurred as the three-way broker menu (partner, do-the-work, license) on 2025-10-13.

FIT TODAY useful for the rep platform and network: license systems to advisors who cannot afford the full engagement.

Two-tier proposal design (Capital Focus vs Full Transformation)

2025-10 (2025-10-24), team, built for Roderick Builders. Every proposal offers two yeses: a lighter capital-and-audit tier and a full transformation tier with systems build.

FATE executed as a pattern in October proposals.

FIT TODAY maps directly onto audit-only vs audit-plus-install packaging for Omnira Partners.

Operate businesses to buyer standards before transfer

2025-10 (2025-10-03), team. Offer to run a business up to the acquiring buyer's standards before handing over ownership, as a flexibility lever in deals.

FATE parked. Stated capability, never a live engagement in the record.

FIT TODAY strong fit as an install-phase upsell on brokered deals; the 90-day install is exactly this move.

Improve-then-buy with long seller financing

2025-09 (2025-09-24 direct-mail-deal-cgo-pricing), Sam, Trejon, Harrison. For an overpriced \$24M-revenue seller: consult first to lift the business, then acquire seller-financed over 8-10 years, bridging the price gap with created value.

FATE analyzed, offer pending, never closed in the record.

FIT TODAY fits the capital lane, and the new SBA 100 percent financing rule (2026-08-23) makes the same gap-bridging easier with debt instead of decade-long terms.

Asset-only sale for unprofitable leads

2025-10 (2025-10-22 outreach-launch-mehak), team. When a lead cannot be grown profitably (a \$4M agency in the red), do not engage for growth; sell its assets (customer list) to a strategic buyer at a discount.

FATE strategy defined, not run.

FIT TODAY a legitimate audit outcome and referral-arm play; keeps unprofitable prospects monetizable.

Quick operational improvements as an early wedge

2025-10 (2025-10-15 service-offering-trust-design), Sam and Trejon. Deliver fast visible wins early in the engagement to earn trust before the bigger advisory work.

FATE parked as a named feature; practiced informally.

FIT TODAY this is what database reactivation is in the current audit: the fast win that funds the rest.

Fractional executive team positioning

2025-10 (2025-10-13 fractional-executive-team), team. Position as a fractional executive team, not a single fractional CMO or CFO: install fractional CGOs covering the gaps between traditional C-suite roles.

FATE parked as a label; the CGO framing won.

FIT TODAY good language for the embedded CGO pitch to \$2M-\$50M owners who cannot afford a real C-suite.

02 Pricing structures

PE anchor-client retainers, fees as a bridge to equity

2025-07 (2025-07-24), Sam and Harrison. Target 3-5 exclusive vertical partnerships with PE firms at \$20k+ monthly retainers, then convert success into portfolio equity.

FATE evolved. The retainer-to-equity ladder became the fee-plus-warrants stack of October.

FIT TODAY still the right shape for the capital lane and the 400+ network's buy-side.

\$200K retainer plus 2 percent success fee

2025-10 (2025-10-03), team. Aligned pricing for buy-side deal sourcing of LOI-ready businesses; also pitched to a \$7B fund the same week (2025-10-03 clip-factory).

FATE executed as the enterprise ask; no signed close in the record.

FIT TODAY the template for institutional buy-side mandates through the brokering network.

Success fee on value created

2025-10 (2025-10-11), Trejon. Compensation based on the increase in business value driven, not upfront fees. The owner only pays for value created.

FATE evolved into the mixed fee-plus-warrants structures; pure success fee hit regulatory friction (2025-10-15 value-levers).

FIT TODAY partial fit; usable as the equity-kicker portion of engagements, with the paid audit covering cash flow.

Fee plus per-acquisition bonus plus warrants

2025-10 (2025-10-24), team, for Texas Southwest Floors. \$60k-\$80k per quarter, \$200k-\$300k per acquisition closed, 10 percent warrants at a valuation-based strike. Higher fee trades against lower bonus.

FATE executed as a proposal (presented by Trejon); the structure repeated for PRP (2025-10-29).

FIT TODAY the premium tier of Omnira Partners for roll-up-minded clients. Keep this rate card.

\$297 per month priced to the GoHighLevel anchor, bring-your-own-keys

2025-10 (2025-10-20 coworking-strategy), team. Price the app at the exact cost of a standard GHL plan so switching feels cost-neutral, and make users bring their own API keys so variable cost and spam risk sit with them.

FATE executed; later stranded when the team left GHL entirely (2026-02-05).

FIT TODAY the anchor-pricing and cost-externalizing principles survive; the specific price is dead with GHL.

Credit-based usage pricing

2025-10 to 2025-11 (2025-10-30, 2025-10-31, 2025-11-19), team. Credits as the universal meter over heterogeneous costs (SMS, enrichment, content), later split into lead credits and contact credits for Propello, with expiring credits for demand predictability (2025-11-01).

FATE executed across products.

FIT TODAY the right meter if any data or outreach capability is productized for reps or clients.

Per-lead pricing ladder with measured margins

2025-10 to 2025-11 (2025-10-13, 2025-11-11, 2025-11-12), Sam and Harrison. Priced \$1-\$1.50 per lead as premium, then, once measured cost hit \$0.045 per enriched lead, set tiers at \$0.60/\$0.50/\$0.40/\$0.30 with roughly 90 percent margins. First sales to Tommy and Anil.

FATE executed; first lead-sale deals recorded 2025-11-12.

FIT TODAY still the rate card if the lead warehouse (GAUNTLET-era data) is ever sold to network buyers or reps.

BNPL-financed community pricing

2025-09 (2025-09-24), Trejon. \$6,000 annual for existing members, \$10,000 for new, financed through Klarna to lower entry friction, grandfathered ladder.

FATE executed for the InfiniteX community era.

FIT TODAY only relevant if a paid partner community returns; the financing trick generalizes to audit fees.

Refundable \$97 call deposit and phone verification

2025-10 (2025-10-13 fractional-executive-team), team. Kill no-shows with a refundable deposit plus phone verification before booked calls.

FATE parked. Verification was implemented; the deposit never was.

FIT TODAY cheap experiment for the rep platform once commission reps start booking owner calls at volume.

Affordability bridge structure

2025-10 (2025-10-21 tiffany-deal), team. \$1.5k upfront, \$1.1k per month for a year starting later, \$10k renewal: preserve headline value while meeting the client's cash reality. Roland got similar flex terms (2025-10-01).

FATE executed twice.

FIT TODAY standard tool for sub-\$5M clients who want the audit but choke on the retainer.

High-ticket intelligence subscription plus pay-per-lead

2025-12 (2025-12-01), Sam and Harrison. Price the pivoted platform at \$500-\$1,000 per month for GTM intelligence and lead refreshing, with a separate pay-per-lead rail.

FATE executed as the pricing intent of the pivot.

FIT TODAY viable productization of the data stack for network buyers, brokers, and reps.

Sell the retained value, not the fee

2025-08 (2025-08-27), Sam and Trejon. Flat fees are easier to justify by highlighting what the client keeps, not what they pay. Target PE-backed buyers because that is where the biggest checks live.

FATE executed as a persistent pricing philosophy.

FIT TODAY the framing for every audit and engagement quote.

Lifetime price lock-in for beta users

2025-10 (2025-10-23 gtm), team. Early adopters get a lifetime price lock in exchange for sign-ups and data.

FATE executed for the app beta.

FIT TODAY reusable for any early-cohort launch, including the first commission rep tools.

03 Products and platforms

The client acquisition app (GHL extension, white-label fulfillment engine)

2025-10 to 2026-02, whole team. The AI outreach system packaged as a premium GoHighLevel extension (2025-10-23), repositioned to GHL agencies as a white-label fulfillment engine with the hook "Help your clients get clients" (2025-10-27), iOS app approved 2025-11-05.

FATE executed, then evolved past. The 2025-12-01 pivot to Go-to-Market Intelligence and the 2026-02-05 removal of all GHL references ended the extension strategy.

FIT TODAY the underlying outreach engine is the install-phase machinery; the GHL packaging should stay dead.

Propello data platform and lead marketplace

2025-11 (2025-11-01, 2025-11-07, 2025-11-10, 2025-11-19), Sam, Trejon, Harrison. Sell overflow seller leads as verified seller-intent data on a credit subscription: \$3,500 per month for 1,000 credits, \$10,000 for 4,000, exclusivity ladder up to \$5,000 per exclusive lead with financials. Separate entity to avoid confusing sellers. Ashish built; Monday full-volume launch planned 2025-11-07.

FATE partially executed, then folded into the GTM intelligence pivot. Never became the standing marketplace as designed.

FIT TODAY top-tier revival candidate. The current lead warehouse plus the 400+ buyer network is exactly the supply and demand this marketplace needed.

DealMaker deal-listing platform

2025-11 (2025-11-04, 2025-11-05), Trejon with Ashish building. A platform listing sourced-but-unengageable business opportunities to vetted buyers, brokers, and investors, with pay-tier information laddering and exclusivity.

FATE parked. Built to review stage, no launch recorded.

FIT TODAY natural fit for the brokering/network lane: overflow deals from audits become listable inventory for the institutional network.

AI Content Factory and Clip Factory

2025-10 to 2025-11 (2025-10-03 both files, 2025-11-03, 2025-11-07), Enrique building, Harrison plumbing. Long-form video into 33 short clips per week per person via Clap, Fall.ai, FFmpeg, Supabase, Notion approval, roughly \$1 per video. Monetization models debated (usage fees, creator incentives); promotion handed to influencer Isabella.

FATE executed internally; monetization parked.

FIT TODAY fits as internal marketing machinery and a rep-platform content lane (the 2026-10 content campaign already echoes it). Selling it as a product stays parked.

Go-to-Market Intelligence platform

2025-12 (2025-12-01, 2025-12-10, 2025-12-11), Sam driving. The defining pivot: from outreach tool to high-ticket intelligence platform, enriching leads with news, LinkedIn activity, job postings, and technographics in versioned per-type tables synthesized into holistic company profiles.

FATE executed; it powered the 2026-01 adaptive campaign architecture.

FIT TODAY this is the audit's targeting brain and the reps' daily-25 fuel. Keep investing.

One-lead-one-agent adaptive campaigns

2026-01 (2026-01-27), Sam and Harrison. Each lead gets a dedicated stateful Temporal entity workflow with a model-per-role stack (Granite routing, Qwen analysis, Hermes writing), local models on a Mac Studio Ollama cluster, human approval first, autonomy after data codifies winning sequences.

FATE executed, then partly reversed: the file itself notes entity-worker logs filled the server disk by August, and Temporal was retired 2026-08.

FIT TODAY the approve-then-codify-then-automate progression is still right for the rep platform; the per-lead-workflow implementation should not return as built.

Quinn AI persona nurture

2025-10 (2025-10-23 gtm), team. A pre-recorded AI video of "Quinn," Director of Operations, sent automatically post-booking to raise show rates, built with HeyGen and 11 Labs with background noise for realism. Judged highly realistic and viable.

FATE executed for the post-booking touch; extending Quinn to other touchpoints was parked. The Quinn persona line still exists in 2026.

FIT TODAY strong rep-platform fit: automated credibility touches between rep booking and owner call.

Seller score

2025-08 (2025-08-08), Trejon. Use reverse phone lookups and demographic data to score the likelihood an owner wants to sell, and rank prospects by it.

FATE parked. Foreshadowed the data-moat talk but was never built as a score.

FIT TODAY high-fit revival: layer a sell-propensity score on the existing enriched database to prioritize audit outreach and feed the brokering lane.

Internal valuation system and seller document portal

2025-10 (2025-10-08, 2025-10-16 valuation-model, 2025-10-20), team. Third-party valuation pain triggered a build-it-internal decision: secure upload portal for P&L, balance sheet, tax returns, specialized AI extraction agents per document type, feeding a full valuation model with 3-5 year projections.

FATE designed and partly built; never recorded as finished product.

FIT TODAY top revival candidate. This is the paid audit's production line; finishing it makes audits scalable beyond founder hours.

Turnkey financial diagnostics with human proofreading

2025-10 (2025-10-13 fractional-executive-team), team. Systems generate the diagnostic; team members proofread and present. Humans as reviewers of machine output.

FATE parked as stated; partially realized in the ops deep dive automation prototype (2025-10-14).

FIT TODAY same as above: the audit at scale. Pair with the document portal.

90-day growth plan auto-generated from valuation data

2025-10 (2025-10-16 valuation-model), team. Use the valuation model output to generate quick wins and a 90-day roadmap as a standard deliverable.

FATE parked.

FIT TODAY near-perfect fit: the current engagement is literally 90 days. This deliverable is the bridge from audit to install.

Community-facing pipeline stats dashboard

2025-10 (2025-10-02), Sam assigned. A front-end dashboard so the community can track deal pipeline stats live.

FATE parked; never recorded as built.

FIT TODAY low priority; could become a rep leaderboard on the rep platform.

Client lead-purchase dashboard

2025-09 (2025-09-18 onboarding-data-monetization), Sam and Harrison. A front end where clients visualize data and buy leads directly.

FATE parked; the idea resurfaced as premium database access (2025-11-10).

FIT TODAY fold into any marketplace revival, not standalone.

Data waterfall enrichment

2025-10 to 2025-11 (2025-10-09, 2025-10-14, 2025-11-11), Sam and Harrison. Ordered cascade of enrichment sources, cheap first, expensive-reliable last; measured coverage pruned vendors (Lead Magic plus SalesQL covered 97 percent, Ghost Genius demoted).

FATE executed; became house doctrine.

FIT TODAY still the enrichment standard for audit targeting and rep lead prep.

On-premise AI and the data moat

2025-10 (2025-10-13, 2025-10-23), team. Long-term vision: self-hosted models to kill API costs, enable unlimited experimentation, and fine-tune on proprietary interaction data as a defensible moat.

FATE partially executed (local Ollama cluster by 2026-01); the fine-tuned-moat part is still aspiration.

FIT TODAY infrastructure direction, not an offer; keep as background investment.

Human-in-the-loop review products

2025-10 (2025-10-01, 2025-10-24), Harrison. A review frontend for AI responses with one-click approved sends, then an iOS app with push notifications for HITL replies.

FATE executed.

FIT TODAY the exact supervision surface commission reps need; port it to the rep platform.

Micro-agent architecture

2025-08 (2025-08-27), Sam and Trejon. Decompose the AI agent into micro-agents for sentiment, tools, drafting, and review.

FATE executed later as the model-per-role stack (2026-01-27).

FIT TODAY absorbed into current architecture thinking.

Self-optimizing outreach prompts

2025-07 and 2025-10 (2025-07-21, 2025-10-01), Sam with Trejon's notes. AI that analyzes sentiment and performance data and refines its own outreach messaging autonomously.

FATE parked repeatedly; the approve-then-codify progression (2026-01) is the cautious cousin that shipped.

FIT TODAY still the end-state for the install-phase outreach product; revisit once enough approved-conversation data exists.

AI M&A product brainstorm

2025-11 (2025-11-06), Sam, Enrique, Harrison. Constraint brainstorm (two weeks, \$1,000 of cloud credits): deal sourcing tools, valuation tools, competitive intelligence, automated due diligence.

FATE parked; none selected.

FIT TODAY the valuation and due diligence candidates are the same build as the audit production line; the rest stay parked.

Dynamic voicemail from TTS

2025-11 (2025-11-04), team. Voicemail recordings plus text-to-speech to create dynamic personalized voicemail messages.

FATE parked.

FIT TODAY cheap rep-platform experiment on the surviving Twilio A2P stack.

AI avatars and Robo Nuggets

2025-10 (2025-10-15 content-pipeline, 2025-10-22), Enrique. AI avatar video creator and avatar-influencer capabilities for content.

FATE parked at exploration.

FIT TODAY low fit; only as content-lane garnish.

OpenClaw orchestration layer

2026-02 (2026-02-05), Harrison building. A deterministic tool-calling agent layer centralizing AI operations on fixed-cost subscriptions instead of per-call tokens.

FATE executed.

FIT TODAY current infrastructure; the fixed-cost principle generalizes to every AI feature quoted to clients.

Become a standalone data provider

2025-09 to 2025-10 (2025-09-11, 2025-09-26, 2025-10-13 prospecting-geo-focus), Sam and Harrison. The recurring fallback offer: sell the cleaned, structured lead data itself, supplementing or replacing ZoomInfo-class vendors. Always kept as the lower-commitment version of every pitch.

FATE partially executed (first lead sales 2025-11-12), never a standing business line.

FIT TODAY dormant asset. The lead warehouse could serve network buyers and reps without becoming a public product.

The self-funding data flywheel

2025-09 (2025-09-18 onboarding-data-monetization), Sam and Harrison. Sell data to fund generating more data; the lead machine finances itself.

FATE parked as a business model; lived on as rhetoric.

FIT TODAY still the right frame if marketplace revenue ever restarts.

Premium database access as a customer benefit

2025-11 (2025-11-10), Sam and Harrison. Score leads by intent and industry and sell premium database access as an upsell to campaign customers.

FATE parked.

FIT TODAY clean rep-platform and client upsell once lead scoring exists (see seller score).

Data quality as paid-for verification

2025-10 (2025-10-01), team. Avocadata delivered 30-40 percent accuracy; the answer was pre-verification of leads before paying to contact them.

FATE executed as doctrine.

FIT TODAY standing rule for reactivation campaigns: verify before spend.

05 Lead gen and outreach tactics

The Vi overnight scraper and the anti-vendor-economics quest

2025-07 (2025-07-21), Sam and Harrison. ZoomInfo's \$15k per year for 5,000 credits launched a months-long effort to own data supply: Vi mouse-automation scraping 100-200 leads overnight, then the custom Chrome extension at 2 seconds per lead (2025-07-25), pagination to 2,000 profiles (2025-08-07).

FATE executed; the entire later data stack traces to this.

FIT TODAY the ethic (engineer around vendor economics) matters more than the tools; most sources have since been replaced.

Schmooze, personalize, engage

2025-10 (2025-10-01), team. Named outreach framework: genuine, personal, curious copy, tested at sentence level with Spintax variation, 3-day sequence, 0.6 percent conversion against a 0.3 percent benchmark.

FATE executed; conversion numbers published live on the streams.

FIT TODAY still the copy doctrine for reactivation and rep outreach.

Binary opener vs open question

2025-10 to 2025-11 (2025-10-22, reversed 2025-11-02), team. The "growing or exiting?" binary opener was adopted, then dropped 11 days later because it disqualified growth-focused owners; replaced by the four-part Authority, Personalization, Insight, Open Question framework.

FATE reversed, then partially revived: the 2026-08-23 script uses the softer "Are you growing or open to selling?"

FIT TODAY keep the 2025-11-02 four-part structure for cold touches; the soft binary works once a conversation exists.

The 5-step call-booking ladder

2025-10 (2025-10-22), team. Validate, get a trust-yes with a known fact, frame intent as discovery, assume the appointment with a specific low-friction slot, set expectations with a welcome page.

FATE executed.

FIT TODAY rep training material, verbatim. Belongs in the LMS.

Wrong-number remove-enrich-reinsert loop

2025-09 (2025-09-30), Sam. Bad numbers get pulled, re-enriched by AI, and re-inserted; data failures are enrichment inputs.

FATE executed.

FIT TODAY standard hygiene for reactivation lists.

Facebook aged accounts and proxies

2025-10 (2025-10-10 both files), Mehak. 500-1,000 daily Facebook DMs via aged accounts and proxies for 5-10 weekly appointments.

FATE parked; faded with Mehak's shift to fundraising skills (2025-11-03).

FIT TODAY stay dead; platform-risk-heavy channels do not suit a compliance-facing brand.

WhatsApp as an international channel

2025-07 (2025-07-24, 2025-07-29), team. 2.5 billion users, key to Latin America; WhatsApp API for international outreach.

FATE parked.

FIT TODAY only if the network brings international deal flow; otherwise stay parked.

Drop Cowboy ISV status and telecom vendor-of-record moves

2025-10 to 2025-11 (2025-10-21 isv-infra, 2025-11-19), Sam and Harrison. Become an ISV so partners launch instantly on Omnira's A2P infrastructure with secondary profiles, numbers bought centrally and transferred later.

FATE executed; Twilio A2P survives into the current stack.

FIT TODAY exactly how commission reps should be provisioned on the rep platform.

Personalized AI video outreach

2025-10 (2025-10-10 ecosystem-transparency), team. Sora-style personalized video messages for outreach.

FATE parked.

FIT TODAY possible high-touch play for the top 25 accounts per rep; still expensive to do well.

LinkedIn automation (Close First AI, gentle automation)

2025-07 and 2025-11 (2025-07-24, 2025-11-12), Sam and Harrison. Gentle LinkedIn automation early, then a \$1,000 per year tool evaluation.

FATE parked both times; no purchase recorded.

FIT TODAY still an open channel gap for the rep force; revisit deliberately.

Blunt "I want to buy your business" test

2025-11 (2025-11-01), Trejon. Test the most direct possible outreach angle and report results.

FATE assigned; results never recorded.

FIT TODAY cheap A/B for the brokering lane; run it properly this time.

Instantly subsequences with value-first content

2026-02 (2026-02-05), Sam and Harrison. AI routes leads into generic time-based subsequences carrying custom content, distributing sends across accounts to beat Gmail limits; emails share relevant industry news rather than selling.

FATE executed.

FIT TODAY current email machinery; extend to reactivation campaigns.

Job-posting and news triggers

2025-12 (2025-12-11), team. Recent job postings (posted within a month) and news as outreach timing triggers inside GTM intelligence.

FATE executed in the data model.

FIT TODAY audit-targeting signal; also a daily-25 prioritization input.

06 Partnerships and ventures

The AIGP relationship and merger-by-osmosis

2025-07 (2025-07-03), Sam as customer of Trejon's AI Growth Partner, 20 percent revenue share. By October the same people operated as one team.

FATE evolved into the merged Omnira and InfiniteX operating group.

FIT TODAY history; the origin of the Sam-Trejon partnership.

MLM distribution partnership

2025-09 (2025-09-23, 2025-09-24), Sam and Harrison. Distribute the system through an MLM's agent base with Omnira as data provider. Ethical gray area flagged immediately; compliance and liability review scheduled before launch.

FATE dropped on ethics and compliance.

FIT TODAY stay dead. The current network model gets the same reach without the taint.

Nebula AI as channel partner turned junior CGOs

2025-10 (2025-10-13 nebula-eval, 2025-10-16), team. Evaluated Nebula as channel or affiliate, judged their audience quality low, and instead onboarded John and Andy as junior CGOs with an accelerated path.

FATE executed as talent absorption.

FIT TODAY the pattern (absorb capable partners into the ladder rather than sign channel deals) applies to the rep force.

SourcePro landscaping venture

2025-10 (2025-10-10 sourcepro, 2025-10-13 prospecting-geo-focus), Sam, Harrison, Connor group. Vertical product for landscaping companies, geographic focus FL/AZ/TX, widened revenue band \$500K-\$20M, launch-as-validation with LOIs as proof.

FATE parked; no further record after October.

FIT TODAY the geo-density screening method survives; the venture itself stays parked.

SageCreek AI training partnership

2025-11 (2025-11-12), Sam, Harrison, Connor. Sam and Harrison generate leads, Connor trains clients to build proprietary AI tools; white-labeling explored; Polar Group roll-up prospect attached.

FATE executed as an engagement lane (named a growth channel 2025-11-21); white-label unfinalized.

FIT TODAY the train-to-own model is a credible install-phase variant for technical clients.

The Trajan joint venture pullback

2025-11 (2025-11-21, context 2025-11-24), Sam and Harrison. Trajan demanded 50/50 equity and control while distrusting their technical work; they refused, offered a narrow data-and-workflow collaboration, and refocused on their own roadmap.

FATE reversed away from the JV.

FIT TODAY the operating rule it produced (keep GTM, brand, and data under your own control) still governs every partnership.

Lance wholesale real estate JV

2025-10 to 2025-11 (2025-10-07, 2025-10-13 sam-mehak, 2025-11-24), Sam. Joint ownership of an outreach system with Lance, Omnira retaining control of data and lead gen, Lance minority in data aspects; Mehak sourcing with Sam taking a \$10-15k spread as middleman.

FATE partially executed, then faded; Sam himself flagged the ethics of sub-to deals unprompted.

FIT TODAY real estate wholesaling stays outside the offer; the data-control deal template is the reusable part.

Charlie app-for-advisor barter

2025-10 (2025-10-22 dev-sync), team. Give Charlie a pro bono app in exchange for a Strategic Advisor title, his expertise, credibility, and network; gated on client momentum.

FATE parked.

FIT TODAY live again: Charlie is in the current orbit (Aria copilot planned), and barter-for-credibility remains a cash-free growth move.

Cortex Labs anchor-client play

2025-10 and 2025-12 (2025-10-21 isv-infra, 2025-12-01), Sam and Harrison. Demo the platform to Cortex Labs as a superior usage-based alternative to Clay and Grotta; the goal was the logo and reseller potential, not just revenue.

FATE pursued; outcome not recorded.

FIT TODAY the anchor-logo strategy fits selling audits into PE-backed platforms via the network.

Perry Capital fund-creation services

2025-08 (2025-08-22), Sam and Harrison. Partner analysis of a firm converting single-deal businesses into \$50M+ funds with institutional access.

FATE explored only.

FIT TODAY capital lane adjacency; the 400+ network now covers this need.

Isabella influencer-led product promotion

2025-11 (2025-11-07), team. Give the Content Factory to a creator with a real audience, get her genuinely using it, and let her promote it instead of founder selling.

FATE executed as a plan; results unrecorded.

FIT TODAY the product-to-promoter pattern fits any rep-recruiting push.

Prove-it-first collaborator filter

2025-11 (2025-11-14), Sam and Harrison. Emmanuel's rev-ops pitch answered with: show concrete short-term revenue contribution before any formal seat.

FATE executed as a standing filter.

FIT TODAY exactly the commission-only logic of the current sales force.

Drip Off AI venture alignment

2026-08 (2026-08-23), Sam, Trejon, Enrique, Yan, John, Suraj, Alex Cortes, Korey, George, Alex. The formation meeting of the current vehicle: AI services merged with business brokering, paid audit foot-in-the-door, 10 percent brokering commission, commission-only reps, silver tsunami plus the Oct 1 SBA 100 percent financing rule, multiple-arbitrage roll-up math, Nuo AI and Robot Depot partnership pending.

FATE executed; this is Omnira Partners forming.

FIT TODAY it is today. Logged so the vault shows the through-line from 2025-07 to here.

07 M&A and capital structures

IT and MSP roll-up thesis

2025-08 (2025-08-27), Sam and Trejon. \$10-50M revenue IT services and MSPs as consolidation targets for their recurring revenue; Cyber AI's acquire-to-cross-sell model studied.

FATE parked as a specific thesis; the recurring-revenue screen survived.

FIT TODAY a ready-made vertical thesis for the brokering and capital lanes.

Boring legacy infrastructure vs media empire

2025-10 (2025-10-16 acquisition-thesis-debate), Sam vs Trejon. Hour-plus head-to-head: Trejon wanted a media empire across marketing, sales, and distribution; Sam wanted boring legacy businesses that are the plumbing of larger industries. The group aligned on Sam's thesis, formalized to boring sustainable B2B (manufacturing, engineering, healthcare infrastructure, industrial services) the same day.

FATE decided for boring; media empire shelved.

FIT TODAY still the target screen for the \$2M-\$50M client base.

Growth-to-Exit, then SPV, then fund

2025-10 (2025-10-20 coworking-strategy), team. The master plan: land two Growth-to-Exit clients, build track record, raise an SPV in 6-12 months at 20 percent carry, then a fund by 2028 keeping 80 percent equity with 20 percent to LPs. Target profile \$2M-\$5M EBITDA, fragmented, owner-operated.

FATE parked at the SPV stage; the service layer shipped, the capital ladder did not.

FIT TODAY the natural capital-lane sequel once Omnira Partners has closed engagements to point at.

T-Star Engineering roll-up

2025-10 (2025-10-27), Sam. Proprietary SVC power tech, growing market, founders ready to exit but willing to train successors; strategic roll-up of fragmented competitors modeled explicitly on Brad Jacobs.

FATE pursued through NDA and one-pager; no close recorded.

FIT TODAY template for network-funded roll-ups; the founder-profile screen (out of day-to-day, willing to train) is the keeper.

Warrants as the equity instrument

2025-10 (2025-10-22, 2025-10-24, 2025-10-29), Sam and Trejon. Warrants capture upside without ownership or compliance burden, letting them stay advisors while participating in value created.

FATE executed in proposals.

FIT TODAY the standard equity kicker for current engagements.

30-60 percent controlling-stake capital partner model

2025-10 (2025-10-15 ma-advisory-scope), Sam. Find one strategic capital partner for a controlling stake, negotiate terms, provide growth capital and operational support; never raise from multiple investors without a broker-dealer license.

FATE executed as the compliant deal shape.

FIT TODAY the capital lane's core structure, now easier with institutional relationships.

Sub-threshold deal routing

2025-10 (2025-10-22 both files), team. Leads below the \$1M cash flow floor get packaged and routed to outside buyer communities (Cody Sanchez group) rather than dropped; every response type has a monetizable path (buyers found in seller campaigns become matchmaking inventory, 2025-09-23).

FATE executed as practice.

FIT TODAY this is the referral arm; formalize the fee split.

Micro-acquisitions lane

2025-11 (2025-11-11), Mehak tasked. Collect financials from micro-SaaS and app sellers and match to a micro-PE buyer.

FATE parked when Mehak pivoted to fundraising skills.

FIT TODAY a low-stakes referral-arm product; small fees, but trains reps on deal mechanics.

Selling Omnira itself

2025-12 (2025-12-09), Sam and Harrison. Jason's acquisition interest profiled like a lead (absentee-owner history, operator son-in-law).

FATE exploratory only.

FIT TODAY reminder that the platform is an asset with its own exit path.

Three-phase deal lifecycle monetization

2025-11 (2025-11-11), team. Pre-acquisition the seller pays for operational work; at close the buyer pays a finder's fee; post-close the buyer pays for operational support via equity or retainer.

FATE executed as the fee architecture on the Ty deal.

FIT TODAY the complete Omnira Partners revenue map in one frame; worth putting on the wall.

Post-close operating work inside acquirers' portfolios

2025-10 (2025-10-15 ma-advisory-scope), Trejon. Build PE relationships that pay twice: deal flow in, operating engagements inside the acquirer's portfolio companies out.

FATE parked; stated strategy, no live engagement recorded.

FIT TODAY high-fit revival: the 400+ network is the distribution for selling 90-day installs into portfolio companies.

InfiniteX rebrand and the 100-businesses mission

2025-07 (2025-07-19), Trejon. Rebrand with brand expert Isabella Badia; mission stated as buy, scale, sell 100 AI-powered businesses to fund regenerative communities; MBA-audience positioning as an alternative path to equity.

FATE executed for the community era; mission language faded from later meetings.

FIT TODAY the mission energy recruits; usable in rep recruiting narratives if wanted.

The naming and legal-claims filter

2025-10 (2025-10-03 naming-legal), Sam and Trejon. Candidates: Alternative M&A Platform, M&A Growth Partner, Strategic Growth Partner. Rule: the name must not promise regulated activity.

FATE executed as a filter; M&A Growth Partner used for the Care Advantage pitch.

FIT TODAY apply the same filter to all Omnira Partners collateral, especially brokering claims.

Dual-brand split: tech company vs premium advisory

2025-10 to 2025-11 (2025-10-21 brand-split, 2025-11-01), Sam. Omnira's tech feel conflicted with premium advisory positioning, so split: Omnira as product and portfolio company, a premium advisory brand (working name Avalier Partners) citing proprietary Omnira tools as its moat, and the marketplace as a third separate entity.

FATE adopted directionally; "Avalier" never stuck, but "Omnira Partners" as the current advisory-facing name is this idea landed.

FIT TODAY executed in effect; keep the marketplace-separation logic if the data business revives.

Product/data packaging split

2025-11 (2025-11-14), Sam and Harrison. Sell the data platform separately from the client acquisition app so neither muddies the other's value proposition.

FATE executed as a packaging decision.

FIT TODAY same rule applies to keeping audit, install, and data products separately priced.

New entity vs Sam's existing brand

2026-08 (2026-08-23), venture group. Launch the merged venture under an existing brand for speed rather than forming a new entity.

FATE open decision at the time.

FIT TODAY live question in the current setup; the 2025 dual-brand lesson argues for keeping advisory and tech identities distinct whatever the entity choice.

Gamified onboarding

2025-07 and 2025-09 (2025-07-03, 2025-09-01), Trejon and Enrique's build. Island-based gamified onboarding (Journey Start, Offer Forge, AI System) with progressive unlocks and milestone calls; Sam wanted it for his own community but was blocked while it was in development.

FATE executed for InfiniteX; Sam's adoption stayed parked.

FIT TODAY strong rep-platform fit: the commission-rep LMS could use exactly this progression mechanic.

The 3-tier CGO ladder

2025-10 (2025-10-16 cgo-roles, 2025-10-16 infinitx-model), team. Junior (sourcing, intro calls), Senior (4-quarter system implementation, seller relationships, CIM creation), Partner (negotiations, deal structure, mentoring). Compensation tied to demonstrated value.

FATE executed, then simplified: partners redefined as deal sources and conversation managers to skip 60-day training (2025-10-20).

FIT TODAY the current rep force needs a progression ladder; this one exists, tested, on the shelf.

Bootcamps as recruiting funnels

2025-10 (2025-10-06, 2025-10-08, 2025-10-16), Trejon. Reformatted from 4 days to one focused day; positioned as the foundation for future firm partners, not a course; full playbook shared as the filter; gated content and abandoned-cart follow-up on the funnel page.

FATE executed through October.

FIT TODAY a one-day bootcamp is a credible rep-recruiting and client-education engine for Omnira Partners.

The 30-day livestream

2025-09 to 2025-10 (2025-09-29 origin, 2025-09-30 planning, 2025-10-01 kickoff), Sam's proposal. Document reaching 20,000 owners live for 30 days, publish real spend and conversion, build \$100M pipeline in public; hit \$93.5M by day 10.

FATE executed; the strongest marketing sprint in the record.

FIT TODAY repeatable. A "90 days embedded, live" series would market the current offer the same way.

100M followers and per-person content quotas

2025-10 (2025-10-02, 2025-10-03), Trejon and Sam mandate to Enrique. 100 million collective followers in 1-2 years; 33 short-form pieces per week per person.

FATE dropped quietly; the content system survived, the number did not.

FIT TODAY keep the machine, skip the vanity target.

AI voice agents for rep training

2026-08 (2026-08-23), venture group. Reps practice calls against AI voice agents trained on owner perspectives so real leads are not burned; call recordings analyzed to refine the whole team's process.

FATE planned, not yet built at meeting time.

FIT TODAY highest-priority rep-platform build; orientation cohorts make it urgent.

AI-generated custom courses

2025-10 (2025-10-27), Trejon. Had Claude build him a financial modeling course over a weekend to close his own skill gap.

FATE executed personally.

FIT TODAY the cheap way to fill the rep LMS with role-specific curricula.

Teach only what you have done

2025-11 (2025-11-01), team. Advanced deal-execution training deliberately deferred until the team closes a deal, so material is real and current.

FATE executed as a rule.

FIT TODAY keep this rule for all rep training content.

Open co-working as community operating system

2025-10 (2025-10-21 coworking-setup), Sam and Trejon. Recurring open co-working with breakout rooms; clients and partners onboard, integrate, and stay retained by being in the room.

FATE executed; the daily marathon sessions were the company's operating mode.

FIT TODAY works as the rep-force cadence too; the room is the culture.

Fractional CFO capability

2025-09 to 2025-10 (2025-09-29, 2025-10-04, 2025-10-13 data-moat, 2025-10-16 app-positioning), team. Recurring push to add finance depth: hire or partner a fractional CFO, guarded delegation; Jordan Wilkerson onboarded for financial modeling.

FATE evolved; Jordan absorbed the function informally.

FIT TODAY the audit still needs credentialed finance review; a fractional CFO partner remains an open slot.

The two-layer business

2025-09 (2025-09-29), Trejon. Productized resources for a broad community below, core team on deal sourcing and high-value clients above.

FATE executed repeatedly across pivots.

FIT TODAY Omnira Partners is the top layer; the rep platform is the bottom layer forming now.

Value levers diagnostic (10, 16, or 19 levers)

2025-10 (2025-10-11, 2025-10-15 value-levers, 2025-10-16 app-positioning), Sam and Trejon. A named lever list (client acquisition, revenue predictability, pricing, owner dependency, processes, technology, financials, and more) as the assessment backbone; the count shifted as it evolved.

FATE executed as the assessment framework.

FIT TODAY this is the audit's checklist; dig up the final list and freeze a canonical version.

Find Money / Make Money

2025-10 (2025-10-24), team. Two-column client value framework: audit costs and vague expenses on one side, growth and capital levers on the other.

FATE executed in proposals.

FIT TODAY clean audit-report structure; owners understand it instantly.

Inception-call doctrine

2025-10 (2025-10-06), Trejon. First calls sell nothing; genuine curiosity uncovers motivation, and complete clarity on what the owner wants precedes any recommendation.

FATE executed; core sales culture.

FIT TODAY page one of rep training.

Ship-now, clean-later data policy

2025-10 (2025-10-21 partner-launch), Sam and Trejon. Never block a launch on data hygiene; schedule cleanup as its own project.

FATE executed as doctrine.

FIT TODAY still the right call, with the caveat that the deferred industry-standardization project kept resurfacing for weeks.

Expectation resets over over-promising

2025-09 (2025-09-26), Sam and Harrison. When prospect Sarah's appointment expectations were disconnected from reality, they corrected her with market data and offered a downgraded engagement instead of matching the fantasy.

FATE executed.

FIT TODAY standing rule for audit scoping conversations.

1.1 Top 10 revival candidates

Parked or unfinished ideas with the best fit to the current Omnira Partners offer, ranked.

- Audit production line (valuation portal, extraction agents, turnkey diagnostics, auto 90-day plan). 2025-10 designs that make the paid audit scalable beyond founder hours; the current offer lives or dies on audit throughput.
- Seller score. 2025-08 idea, now buildable on real interaction data; prioritizes audit outreach and feeds brokering with propensity-ranked sellers.
- Post-close installs inside acquirers' portfolios. 2025-10 strategy that turns the 400+ network into recurring distribution for 90-day engagements, not just deal fees.
- Deal and lead overflow marketplace (Propello plus DealMaker). 2025-11 builds that monetize every lead and deal the team cannot run, straight into the institutional network.
- AI voice rep training. Planned 2026-08 and not yet built; the commission-only force needs practice reps that do not burn leads, immediately.
- Growth-to-Exit to SPV capital ladder. The 2025-10 master plan resumes the moment closed engagements exist to point at; 20 percent carry is the upside the service fees lack.
- Gamified rep onboarding plus the 3-tier ladder. Both built and tested in 2025; the rep LMS and progression path are sitting on the shelf.
- Quinn-style persona nurture between booking and call. Proven viable 2025-10; raises show rates for rep-booked owner calls at near-zero cost.
- Refundable call deposit plus phone verification. 2025-10 no-show fix, never fully tried; cheap test once rep bookings scale.

- Asset-only sale routing for unprofitable audit subjects. 2025-10 triage move that gives the referral arm a product for the clients the audit disqualifies.

1 2 Graveyard with a lesson

Ideas that failed or were wisely dropped, and what each taught.

- MLM distribution partnership (2025-09). Reach never justifies an ethically gray channel; the compliance liability surfaced within a day of the ethics doubt.

- Media empire acquisition thesis (2025-10). Buy the plumbing, not the spotlight; the boring-infrastructure thesis won the debate and still holds.

- Trajan 50/50 joint venture (2025-11). Never trade equity and control for promises; keep GTM, brand, and data sovereign in every partnership.

- Binary "grow or sell" cold opener (2025-10, reversed 2025-11). Copy that forces a choice disqualifies your best ICP; open questions first, binaries later.

- GoHighLevel dependence and the GHL-extension strategy (2025-10 to 2026-02). Renting the platform capped scale and forced a full migration; own the stack you sell on.

- Free valuation as door-opener (2025-10, replaced 2026-08). Free diagnostics attract volume, not commitment; the paid audit filters for serious owners and funds delivery.

- Per-lead Temporal entity workflows (2026-01, retired by 2026-08). Elegant architecture is not free; the design filled a server disk and had to be unwound. Match infrastructure ambition to ops capacity.

- Aggressive debt restructuring for Roderick Builders (2025-10). Never fix a client's balance sheet at the owner's personal expense; the relationship is the asset.

- AI scheduling tool (2025-09). Client-facing automation failures are intolerable; it booked a call 24 hours late and was pulled the same day.

- Avocadata as a primary source (2025-10). 30-40 percent accuracy taught the rule: verify before you pay to contact.

- 100M follower goal (2025-10). Vanity targets evaporate; the content system that survived is the part that mattered.

- Facebook aged accounts and proxies (2025-10). Platform-rule arbitrage does not belong under a brand selling trust to business owners.

- Appointment-volume over-promising (the Sarah case, 2025-09). When expectations are disconnected from market reality, reset them with data or downgrade the engagement; never match the fantasy.

- Real estate broker and developer market entry (2025-10). Declining a market on purpose is a decision too; they logged it explicitly and kept focus.

Compiled from 144 internal Fathom-recorded meetings, July 2025 to August 2026. Companion to the Omnira Method, the closing playbook, and the audit field manual. Dates cite the source meeting.