



## Reviewed their "About Us"

**R1** What is their mission and how well are they doing in comparison?

**R2** Who and where do they serve?

**R3** What is the landscape of their leadership team?

## Examined how to approach them

**E1** Who is the best person(s) to approach and **why**?

**E2** What is the best way to engage them and **why**?

**E3** How are we prepared to deliver **differentiation** in soliciting a first meeting?

## Assessed how we could be of value to them

**A1** What challenge(s) might they have and how does it impact them?

**A2** Who do they compete against and **how**?

**A3** Who can we help become the hero(es)?

## Determined what could delay or prohibit progress

**D1** Who might create interference and why?

**D2** What external circumstance(s) could stop or delay progress?

**D3** What internal circumstance(s) could stop or delay progress?

## Your top research resources

- ☐ Website
- ☐ Social Media
- ☐ Corporate Strategy Guide
- ☐ Financial Reports
- ☐ 10K
- ☐ Trade Magazines

- ☐ Internal Reporting (CRM)
- ☐ Colleagues
- ☐ Prospect Competitors
- ☐ Prospect Employees
- ☐ Glassdoor
- ☐ Google/Google Alerts

- ☐ Zoominfo
- ☐ ChatGPT
- ☐ Crunchbase
- ☐ Internal Research Tools
- ☐ Vendors
- ☐ P.R.E.S.S.U.R.E. Review

## Bonus Laps

What does the prospect want me to know about them?

What does the prospect want me to know about my own organization?