Pre-Contact Checklist

Doing Your Homework Before Reaching Out

- [ ] **Read their LinkedIn profile** Review education, background, and experience.
- [ ] **Subscribe to their Twitter/Linkedin/Facebook feeds** Favorite, and follow.
- [ ] **Gather RAB Research** Instant Backgrounds, Gold Digger & The Pitch, etc.
- [ ] **Visit their company website** review content. Subscribe to RSS feeds or blogs to stay current. Is there something happening inside the company? (a promotion a new product, a new initiative)? These kinds of triggering events are important to know about. They also serve as good reasons to contact your prospect or customer.
- [ ] **Visit competitors websites** review content. Look for strengths, weaknessess, opportunities, and threats. How are they better/worse than your prosepct?
- [ ] **Sign up for Google alerts on the business.** Track news on the most important businesses you're working with. Respond quickly with ideas and support as you are alerted.
- [ ] **Check the website of a trade association** for the categories you are calling on. Nearly all categories have trade associations. These sites can provide valueable information regarding the issues and trends affecting your prospects business. This allows you to focus your discussion on their problems.
- [ ] **Find a trade magazine for your prospect's business** Read the cover stories. Read the publisher's column. Discover what their industry "problems" are. Learn the "experts" opinions as to how to solve those industry problems.
- [ ] **Get to know people in the company besides your primary contact.** Ask sales people about the business flow. Make friends with the receptionist or assistants. Learn about company initiatives and directives.
- [ ] **Read SEC Filings of public companies & non-profits. (10-k / I-990)** The documents contain wealth of information about the business; challenges, opportunites. They also provide insight on structure, financials, and objectives.

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