



Prospecting Checklist: Finding the Right Customers

Do you have the following data points to find the right customers?

Basic Information:

In addition to having basic contact information, knowing a company's firmographics can help you refine your marketing efforts by geography, business size, etc.

- Contact name
- Contact email address
- Company state
- Years in business
- Number of employees

Additional Company Information:

Go beyond the basics. Having an expanded view of a business allows you to get more focused. For instance, marketing to businesses that meet certain credit score requirements or Fortune 1000 rankings.

- Fortune rank: Fortune 1000 ranking
- Total Sales Volume: Reported dollar sales amount for the company (for publicly traded companies).
- Business status code: Denotes whether the business is a headquarter, a branch, a subsidiary headquarter, etc.
- Business credit score: Score that denotes how well the business repays debts.
- Commercial IntelliscoreSM: An Experian modeled score used for risk assessment, designed to predict 90-day payment delinquency of businesses.

Company Classification Information:

Target your marketing efforts towards a specific industry to find the most appropriate customers.

- Primary SIC code: The 6-digit code that identifies the business's primary activity.
- NAICS code: The North America Industry Classification System code.

Legal History:

Using legal history data to refine your marketing outreach can be an easy extra level of protection that many tend to overlook.

- Bankruptcy filed indicator: Indicates bankruptcy filed in the last 10 years.
- Tax lien indicator: Indicates presence of tax lien.
- Derogatory legal indicator: Indicates presence of any derogatory public record filings such as tax liens, bankruptcies, or any collection accounts associated with the business.
- UCC data indicator: Indicates presence of Uniform Commercial Code (UCC) filing, which states that the business has secured a line of credit by collateral.