

# PROSPECT RESEARCH CHEAT SHEET

Whether you've been formally invited to the pitch—or are just starting to size up potential clients—use these proven search tactics to get smarter, faster.

## 1. Know Your Prospect

Companies don't hire agencies. People do. To win new business, win over decision makers. To be interesting, be interested. *Get to know your prospects before you meet them.* Here's how...

### Q Bob Iger "and his wife"

Simple but effective: search for information on your prospect's partner. Family members often share freely what their spouses hold close to the vest. A couple's shared activities can be illuminating.

### Q "Auburn Magazine" "Tim Cook" Apple

Look beyond LinkedIn to paint a picture of your prospect. Alumni publications can be a rich (and often overlooked) source of intel on a business leader's formative years and personal life.

### Q "sat down with Leonardo Dicaprio"

Google your prospect's name and "sat down with." You'll fast-track your search and often get insightful, in-depth information from published interviews.

### Q "interim CMO"

Where there's a newly named CMO, there's likely an agency review to follow. Beat others to the punch by Googling the term "interim CMO." Get smart on a company's challenges before your competition—and before a new CMO is on board.

### Q "prospect name" Pinterest

A prospect's Pinterest page can be fluff-filled—or revelatory. Is she working on a home remodel? Is he showing off his baseball card collection? Are they planning a trip? Small insights can become conversation starters that lead to personal connections.

## 2. Understand The Company

To unearth intel on a company, look where your competitors aren't looking. Ask questions they aren't asking. Figure out what's next, not just what's now. Here's how...

### Q 7-Eleven "plans to"

Search a company's name and phrases like "has begun testing," "is rolling out," or "plans to." You may find a clue to an upcoming product launch or branding shift.

### Q "Frito-Lay" million

Search a company's name and the word "million" to gain quick insight on multiple fronts: revenue trends; which products are faltering; outside investments; new partnerships, etc.

### Q site:cicis.com "internal use"

Companies often leave draft documents of interest or company manuals on the web. Use search phrases like "internal use only" to turn up work-in-progress content. (Admittedly hit-and-miss.)

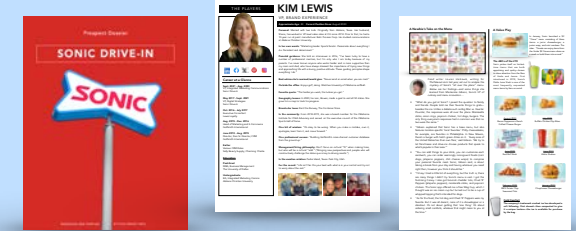
### Q "soft drink category" "according to"

"According to" is a search phrase that can help you identify industry experts in short order. Look for names that pop up repeatedly in the news. Go-to experts often offer the latest and most relevant insights.

### Q "Walmart overhauls"

A corporate house cleaning or business pivot may be an indicator that a company's marketing strategy—and everything else, for that matter—is under the microscope. Combine a target company's name and the word "overhaul."

## 3. Compile a Dossier



Intelligence gathering is a team sport, but when it's pencils down, consider designating one person to compile a prospect dossier: a succinct, insightful, tone-setting document with the uncommon intel you've uncovered about a company and its decision makers. The goal: keep everyone up to speed, on the same page, and perfectly prepared heading into your pitch. Download a sample dossier here: [pitchperfectintel.com/custom-dossier](https://pitchperfectintel.com/custom-dossier).

***As you compile your prospect dossier, be brave enough to be brief. It's about educating—not inundating—everyone involved in your new-business effort.***

### The Fine Print

*Research, like life, doesn't always go according to plan. If that's the case, improvise. Tweak your search terms. Try the VP of Marketing instead of the CMO. Experiment. If try-try-again's not your thing, try emailing us. We just might be what you were looking for all along.*



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