

Race R.E.A.D.Y.

A fast, simple checklist to determine how ready we are to reach out to a prospect, and our current position to create differentiation.

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 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 challenges 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?

Determined what could delay or prohibit progress

D1 Who might create interference, and why?

D2 What external circumstances could stop or delay progress?

D3 What internal circumstances could stop or delay progress?

Your top research resources

- ☐ Website
- ☐ Corporate strategy guide
- ☐ Financial reports
- ☐ 10-K
- ☐ Social media
- ☐ Trade magazines

- ☐ Prospect competitors
- ☐ Prospect employees
- ☐ Colleagues
- ☐ Vendors
- ☐ Glassdoor
- ☐ Internal reporting (CRM)

- ☐ Google / Google Alerts
- ☐ ChatGPT
- ☐ ZoomInfo
- ☐ Crunchbase
- ☐ Internal research tools
- ☐ 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?

