

INBOUND SALES RESEARCH WORKSHEET

KEY RESEARCH TAKEAWAYS TO RECORD

1. What do they do?
2. Who do they sell to?
3. Why buy from them instead of their competitors?
4. Any red flags?
5. Level of sophistication in their industry
6. Trigger events
7. Priority of lead

ADDITIONAL COMPANY INFORMATION

1. Company size
2. Are there any other key players that may be involved?
3. Annual revenue
4. Role of lead within the company

TRIGGER EVENTS/INDUSTRY NEWS

1. Company news
.....
2. Recent funding
3. Are they hiring?

- 4. Territory expansion
- 5. Upcoming events
- 6. Recent partnership announcements
- 7. Articles on 3rd party websites
- 8. Recent awards
- 9. Executive interviews

SOCIAL MEDIA

- 1. LinkedIn profile
- 2. Shared contacts/groups
- 3. Is your lead actively talking with other companies?
- 4. Is your lead researching other needs?

HUBSPOT LEAD INTELLIGENCE

- 1. What did they download?
- 2. What pages did they look at?
- 3. What emails are they reading?
- 4. What is resonating with them?

ADDITIONAL NOTES