ULTIMATE ACCOUNT RESEARCH CHECKLIST

LEVEL 1

Basic Company Research

LinkedIn

- ☐ Employee Count: Are they growing, flat, or shrinking? Which departments dominate?
- ☐ HQ Location: Where’s the center of power? Do we have customers in the region?
- ☐ Industry: What industry are they in? Do we serve similar companies or use cases?

Website

- ☐ Product: What do they sell?
- ☐ Target Industry: Which industries do they focus on?
- ☐ Case Studies: Who is their ICP? Who typically buys from them?
- ☐ Business Model: How do they make money? (e.g., pricing pages, subscriptions)
- ☐ Value Proposition: What features, use cases, and value do they highlight?

LEVEL 2

Deep Company Research

Investor Relations and Edgar Database

- ☐ Annual Reports: What are their strategic priorities and challenges?
- ☐ SEC Filings (10-K, 10-Q, DEF 14A): Strategic goals, financials, exec. comp, board info

BusinessWire or Company Homepage

- ☐ Press Releases: Product launches, partnerships, major initiatives

SeekingAlpha or similar

- ☐ Earnings Call Transcripts: Executive voice, analyst Q&A, quarterly/annual focus

ListenNotes or similar

- ☐ Podcasts: Tactical insights from mid-level stakeholders or execs’ strategic insights

LinkedIn Jobs or Career Page

- ☐ Job Openings: Reveal current priorities, team expansions, tech stack, priority projects

LEVEL 3

Contact Research

LinkedIn or Sales Navigator, X, Reddit, Company Pages, Online Search

- ☐ Recent Hires: Who’s shaking up departments? New leaders = new priorities
- ☐ Recent Departures: Why did they leave? What gaps might now exist?
- ☐ Key Stakeholders: Map decision-makers via LinkedIn and research
- ☐ Professional Backgrounds: Understand history, moves and past experience
- ☐ Online Presence: Personality clues from content, posts, or interviews
- ☐ Personal Insights: Shared hometown, school, passions? Use them to build rapport