

RESEARCH

Being well informed is critical to helping you make meaningful connections. Research should be considered a prerequisite to asking questions that connect. The knowledge gained from appropriate research allows you to ask insightful questions with confidence. More importantly, good research prevents you from asking the wrong questions and appearing totally clueless about an individual, company or industry. The list below is not exhaustive and you don't need to do all of them. This list gives you an idea of the type of research that will help you add value and formulate questions that connect.

Media Releases

Press releases provide a great overview of issues relevant to the company and generally cover all sorts of topics ranging from the participation in local educational programs to comments regarding adverse legal decisions. Depending on the volume, glance over the releases issued in the last 3-6 months to be current on your prospect or client.

8Ks and 10Ks

Read at least the last four to learn about important issues the company is addressing.

Annual Report

Read the latest annual report and you will learn about the strategic direction of the company.

Website

A review of the company's website provides insight on culture as well as employee and customer engagement.

Social Media

Review tweets and posts for current updates and a glimpse of company culture.

Google Alerts

I find this helpful in letting you know what others are saying about a company or individual.

Analyst Calls

Good for knowledge about pain points and strategy expressed by the c-suite. Links to these calls are typically found on the investor relations page of public companies.

"The next best thing to knowing something is knowing where to find it."
Samuel Johnson (1709-1784) British author