



Checklist: Is Your Industry Intelligence Credible, Timely, and Actionable?

WHEN EVALUATING THE INDUSTRY DATA AND INSIGHTS YOU USE TO ADVISE BUSINESS OWNERS, STRUCTURE DEALS, OR SUPPORT CREDIT DECISIONS, ASK YOURSELF:

CREDIBILITY & TRUSTWORTHINESS



Is the data source independent, unbiased, and free from hidden agendas?



Is the content differentiated from what a business owner could easily find in a basic internet search or open AI query?



Has the information been validated by human experts rather than scraped from the internet or auto-generated by open AI?



Is the data proprietary and/or unavailable to the general public? (Proprietary, gated data is expensive to produce and therefore can be more valuable to a business owner.)



Can the intelligence be traced back to a reputable publisher, experienced researcher, or vetted third party?

TIMELINESS & RELEVANCE



Does the information reflect the most current market and industry conditions?
Can you rely on it for conversations with business owners about industry trends and news happening now ... not just past events?



Does the content account for recent economic, regulatory, or competitive shifts in the industry?



Are salient updates provided on a regular basis (not infrequently or inconsistently)?

INDUSTRY SPECIFICITY & ECONOMIC DEPTH

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| ☐ Is the intelligence 6-digit NAICS-specific, going beyond generic economic data to provide industry-by-industry insights? | ☐ Does your research solution help you speak in CEO-relevant terms and about topics that are top-of-mind with business owners? |
| ☐ Are industry-specific operational challenges, revenue drivers, and benchmarks clearly presented and easy to understand? | ☐ Does the intelligence provide local or regional context when relevant? |
| ☐ Does the content highlight risk factors and opportunities that are unique to an industry? | |

PRACTICAL UTILITY FOR PROFESSIONALS

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| ☐ Is your research platform simple to use with easily digestible content – both for you and the business owners with whom you share it? | ☐ Does the content prompt you to ask smarter, industry-specific questions that build trust? |
| ☐ Does your industry research solution lend itself to different “levels” or preparation: 5 minutes, 15 minutes, an in-depth review? | ☐ Can you easily share the intelligence in reports, presentations, or digital platforms? |
| ☐ How intuitive is it to incorporate the insights into loan approval documents, an advisory pitch, or a conversation with a business owner? | ☐ Are there built-in notifications to alert you when new content or data is added? |
| ☐ Does the information make you look more prepared, help you establish credibility, and support consultative conversations? | ☐ Does the platform send quarterly email updates on your chosen industries, prompting you to proactively reach out to business owners or further your personal knowledge? |
| ☐ Does the industry data provide visualization including graphs and tables that are exportable to other platforms? | |

COMPETITIVE ADVANTAGE

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| ☐ Does your research help the first appointment with a business owner feel like the third? | ☐ Does the intel equip you to proactively spot possible industry risks and take advantage of potential opportunities earlier than your peers? |
| ☐ Do you feel a competitive edge over your peers who rely on generic open AI answers or internet searches? | ☐ Does your industry research support the entire lifecycle of the relationship, including customer acquisition, credit analysis, and lending? |
| ☐ Does the content position you as a trusted advisor with deeper economic and industry insight into a business owner's world? | |

VALUE THAT EXTENDS BEYOND INDUSTRY CONTENT

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| ☐ Does your industry research solution have utility to a broad spectrum of professionals, from bankers to accountants to business consultants ... and more? | ☐ Do you have access to a full customer training and success team, available whenever needed, to help you get the most out of the platform and reach your strategic goals? |
| ☐ Are you able to access additional value-added content on your platform, such as proprietary risk rating data, financial benchmarks, and local economic information? | ☐ Are you provided with a wide array of learning and development tools and resources, all at no added cost? |
| ☐ With your industry research provider, do you have a collaborative partner that is invested in your success? | ☐ Is the content of your industry research platform regularly reviewed and updated by a team of expert researchers so you can always be confident in its accuracy and timeliness? |
| ☐ Are you able to seamlessly integrate information from your industry research platform into your corporate systems via API? | ☐ With just a click, can you customize content pulled from your research platform to feature your own corporate branding? |

IF YOU COULDN'T CHECK ALL OF THESE ITEMS, IT MAY BE TIME TO EXPLORE VERTICAL IQ. VISIT WWW.VERTICALIQ.COM TO LEARN MORE.