

## FRAMEWORK

# The 5-Minute Pre-Call Research Checklist

The exact signals to check before any cold call. Works for any industry, any ICP.

Use this before every call. Takes 5 minutes. Tick each box as you go. Skip nothing.

## 1 - THE COMPANY (60 SECS)

- What does the company actually do — in one sentence?
- How big are they? (headcount + revenue estimate)
- Recent news: funding, hiring surge, expansion, new product, leadership change?
- Any obvious pain or trigger in the last 90 days?

## 2 - THE PERSON (60 SECS)

- How long have they been in role? (new = high urgency, long = status quo risk)
- Previous companies — any relevant context or shared territory?
- Any recent LinkedIn activity, posts, or comments?
- Mutual connections or shared background?

## 3 - THE HOOK (60 SECS)

- What's the one signal most relevant to your pitch?
- Is it timely? (within 90 days is ideal)
- Can you reference it naturally in the first 10 seconds?
- Does it connect their world to the problem you solve?

## 4 - THE CALL ITSELF (60 SECS PREP)

- What's the single outcome you want from this call?
- What's your opening line? (written down, not improvised)
- What objection are you most likely to face?
- What's your fallback ask if they're not ready to move?