

Lead Generation Technology Checklist

Purpose: Provide guidelines for which features and attributes of lead generation software to prioritize when considering various providers.

Instructions: Use this checklist to systematically evaluate your lead generation technology against key features and prioritize according to your business needs.

Feature	Importance	Description	LeadGraph Example
Data Enrichment		Appends firmographic, technographic, and demographic data to client lists	All company exports include over 40 firmographic, technographic, and demographic data points
API Connectivity		Synchronizes with other account management software (CRM, Marketing Automation)	Native connectivity to Salesforce and HubSpot
Custom Field Mapping		Aligns the most important data across systems	Custom field mapping for automated enrichment of CRM
Real-Time Market Monitoring		Provides live feed (or similar) of market events and occurrences that indicate potential buying triggers	"Feed" monitors over 15 market occurrences and buying trigger events
Analytics-Based Insights		Provides high-level customer and industry insights	Ideal customer profile (ICP) based on automated analysis of current customers
Prospect Database		Compiles account-level data for entirety of industry/vertical	Data for over 250 million businesses
Contact Database		Provides contact-level data for all businesses within the platform	Data for over 700 million contacts
User-Friendly		Easily understood and operated by users without requiring significant training or ramp times	Single-page layouts with clickable content
Advanced Filtering		Enables highly targeted strategies through advanced industry, firmographic, and other filters	18 advanced filters to isolate the ideal companies and contacts
Account Prioritization		Ranks prospects based on similarity to current customers	ICD scoring depicting how closely an account resembles your ideal customer
Web Traffic Monitoring		Monitors web traffic and captures data on site visitors	IP address monitoring with enrichment for companies that view your site
Data Visualization		Provides comprehensive dashboard views into key data	Dashboards for ideal customer, company and contact at the click of a button