



SOURCE

Account Research in 15 Minutes

A focused research routine for understanding an account without disappearing into hours of preparation.

Research enough to form a point of view. Then go learn from the buyer.

Suncoast Spark · Free Resource for B2B Account Executives

WHY 15 MINUTES?

Good account research creates a hypothesis. It does not create certainty.

Many sellers either do too little research or spend far too much time collecting information they never use. The goal is not to know everything about the account.

The goal is to understand enough to answer:

Why might this account be worth pursuing?

Is there a plausible fit between what this company faces and what we solve?

What appears to be changing?

Is there a signal — leadership, strategy, market — that creates potential urgency?

Who is likely to care?

Which roles are most likely to own or feel the problem we address?

Where might our solution be relevant?

Which use case or capability maps closest to what this account appears to be doing?

What still needs to be validated directly with the buyer?

What can only be learned through conversation — not research?

📄 **PUBLIC INFORMATION = EVIDENCE ABOUT THE COMPANY**
NOT PROOF OF A BUYER PROBLEM

The 15-Minute Routine

Minutes 0–3 · Understand the company

Look for: What the company sells · Major business units · Approximate size and geography · How the company makes money · Important customer segments

Output: One-sentence company snapshot

1

2

Minutes 3–6 · Find current priorities

Look for: Strategic initiatives · Growth priorities · Cost reduction · Transformation programs · New markets · Major investments

Useful sources: Company website, earnings material, executive interviews, investor presentations, recent credible news.

Output: Two or three priorities that may matter

3

Minutes 6–9 · Look for change

Look for: Leadership changes · Acquisitions · Restructuring · Hiring changes · New technology · Regulatory pressure · Competitive moves · Expansion or contraction · New initiatives

Output: One or two credible "why now?" signals

4

Minutes 9–12 · Map likely buyers

Identify likely: Business owner · Executive sponsor · Operational user · Technical stakeholder · Procurement / finance influence

Do not assume titles equal influence.

Output: Initial buyer-role hypothesis

5

Minutes 12–15 · Build the hypothesis

Complete the account hypothesis template — the one thing that turns research into preparation.

Output: A written hypothesis you can test in the first conversation

WHAT TO RESEARCH

Seven things worth knowing

1 · Company Context

What does the business do and how does it make money?

2 · Business Priorities

What appears important to leadership right now?

3 · Change / Triggers

What has changed recently that could create urgency?

4 · Likely Buyers

Who may own the problem, budget, implementation, or decision?

5 · Current Approach

How might they be handling this problem today?

6 · Relevant Proof

What customer evidence or use cases could be relevant?

7 · Unknowns

What cannot be learned from research and needs buyer validation?

Your Account Hypothesis

Complete this before your first engagement. A written hypothesis is more useful than a collection of notes.

Account
Why this account fits
What appears to be changing
Potential business problem
Potential impact
Likely buyer
Relevant use case
Relevant customer proof
Most important unknown
Best opening question

Know what you know.

Strong account research requires being precise about the difference between what is confirmed, what is inferred, and what is unknown. Most sellers blur these categories — and it creates problems in the first conversation.

KNOWN

Information supported by a credible source.

- Announced initiative
- Leadership appointment
- Published financial priority
- Confirmed technology
- Verified organizational change

HYPOTHESIS

A reasonable interpretation that has not been confirmed.

- This initiative may create a problem we solve
- This executive may own the issue
- This event may increase urgency

UNKNOWN

Something that requires buyer input.

- Business impact
- Internal priority
- Budget
- Decision criteria
- Willingness to change
- Timing

Never promote a hypothesis to a fact just because it makes the account story stronger.

STOP RESEARCHING WHEN...

You have enough to start a useful conversation.

Stop when you can explain each of the following. If you cannot, that is the gap to close — not more browsing.

- ☐ Why the account appears relevant
- ☐ What appears to be changing
- ☐ Who may care
- ☐ What use case might matter
- ☐ What evidence supports your hypothesis
- ☐ What you still need to learn
- ☐ What question you want the buyer to answer

 If you are still researching because you are afraid to engage the account, more information probably will not fix the problem.



AE ON DEMAND

What if the research became the starting point instead of the finished product?

AE on Demand helps account executives take company research and turn it into account plans, discovery preparation, buyer hypotheses, stakeholder strategy, deal thinking, follow-up, and next-step decisions inside ChatGPT or Claude.

The research tells you what may be happening.
AE on Demand helps you decide what to do with it.

Explore AE on Demand at aeondemand.com

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