

Online Treasure

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If you're an advisor looking to build a high-net-worth client base, identifying qualified leads is a core component of your success. But don't resort to buying expensive and potentially inaccurate lists. There are ways to find and/or build lists using free web tools-if you know how and where to look.

Most people start their list search in Google. But a search for terms like "small business owners Minneapolis," or "list of CEOs," will turn up thousands of results that are either incomplete or are companies trying to sell you something.

There is, however, a Google search secret to develop a quality list. There are literally billions of files-including Excel documents, PDF files, PowerPoint documents and Microsoft Word documents-"floating" on the Web. They get there when people post a file to a web server so it can be downloaded by others. Many of these files were meant for the recipients only, but if they were posted online in an open environment-versus secured by a username and password-Google can find the file and index it.

Think of Google indexing like a big vacuum cleaner. When Google finds a web page, it vacuums up every word on the page and stores them in its database. When you type words into Google, it looks returns results from web pages that it has vacuumed up where those words appear. When Google vacuums up or indexes a file like an Excel spreadsheet, it not only indexes the document title, but also every word within the document! Thus, you can use Google to locate names and words within documents, and if Google has indexed files that contain your search terms, you can instantly download the files, many of which contain valuable lists of names and contact information.

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SEARCHING BY FILETYPE

To find these files use the Google filetype: (filetype colon) search. Enter your search terms followed by "filetype:" and then the type of file you want to locate. For excel spreadsheets, use xls or.xlsx. Word

documents would be doc or docx. Powerpoint documents would be ppt or pptx. And pdf files would be pdf. For example, a search for "chamber of commerce" + list + filetype:xls returned more than 3,400 results with the phrase "chamber of commerce" and the word "list." Note: when searching for a phrase, encapsulate the phrase in quotation marks, as in, "chamber of commerce." Putting the words in quotation marks tells the search engine that those words must be in that exact order, every time.

You can click on the result to download and open the spreadsheet. In my search above, many of the results included membership lists, program attendee lists and more. You may also want to try similar searches using the filetype extension PDF, since membership lists and directories are often converted to Adobe PDF files. The same search above looking for PDF files, "chamber of commerce" + list + filetype:pdf, delivered more than 2.4 million results!

Another approach for doing list searches online is to seek the names of people or terms that might appear on the list. For example, entering "brad smith" + "john anderson" filetype:xls will deliver a number of Excel spreadsheets containing those names. If you don't know any names, enter other terms that might appear on a list, such as phone number, address, etc. For example, "chamber of commerce" + name + phone + address filetype:xls delivered more than 5,500 results. Important: Do not use this technique to send a mass email. Remember, this is NOT your list. Thus, if you email the people on the list you could be accused of being a spammer with consequences ranging from having your email address blocked, to getting in trouble with the law.

Besides Google, there are several other online ways to search for people and build lists. Two extremely helpful sources are linked in and your local library.

LinkedIn. This social networking site helps you create connections with people you know and the people they know. Once you're registered, invite people into your network, which can grow quickly because as people accept your invitations, and as you accept theirs, everyone's network is shared. Once you've built up a good sized network, you can use LinkedIn's Advanced Search (the small link next to the main search button) to build valuable lists.

Looking for someone at a specific company? Enter the company name in the appropriate field and use the pull-down menu to choose if you want only current employees or if you want to include past employees. Want people with job titles within a specific geographic area? Enter the appropriate job titles in the Title field and the Location field and specify a mile radius around a ZIP code.

LinkedIn also lets you limit your search by keywords and by industry. So say I'm looking for financial decision makers in the healthcare industry within 50 miles of my office ZIP code. In LinkedIn's Advanced Search, I enter the query "finance" or "financial" in the Keyword field (by entering OR in uppercase, I'm telling LinkedIn that one or both of those words or phrases must appear in my search results). In the job title field, I'll choose "current" and then enter "CFO" or "director" or "manager" or "vice president" or "VP." I then choose "50 miles" and enter my ZIP code. In the industry selection field, I click the Hospital and Healthcare box. When I conducted this search in my LinkedIn account, I got 449 results that met my search criteria. When I removed the geographic limitation, I got almost 18,000 people.

Most people don't know it, but one of the most powerful business research resources is your local public library. Big companies with big budgets pay to have expensive databases and list-building services at the office, but these lists are beyond the budget of most small companies and individuals-unless they have a local library card.

Most libraries pay for the same premium subscription databases that big companies do and you can access them for free. Want Dun and Bradstreet or InfoUSA (Reference USA at most libraries) to pull lists of companies and/or individuals? There's a good chance your library subscribes to one or both of the databases.

Even better: You can often access most of these databases at no charge via your own computer 24 hours a day, seven days a week, as long as you have a library card. First find your library's website; for a listing, visit the Warm Call Center at warmcallcenter.com and click Your Library. Once on your library's site, locate a tab or link titled "databases" or "online information" or "Internet resources." View the list of databases to which your

library subscribes and look for "company information" or "people information." You'll most likely find a link to either Dun and Bradstreet or Reference USA, or both.

Click on the link to access the database and enter your library card number. Once you're in the database, you can create lists using the search tools. For example, you can create lists of companies by geography, industry, revenue, employee size and many other criteria. If your library subscribes to ReferenceUSA's people search, you can build lists of names by household income. Once your list is built, you can download it and use it in Excel or even in your firm's CRM system. Most libraries limit the number of search results you can download at one time, so you may need to download a list, click your browser's "back" button, and then download the next set of names.

By using these simple techniques, you can start to build the lists you need for your business development. Once you get the hang of it, finding free lists online is easy, and even fun-especially when you find something that you didn't think existed. Armed with the right information, you can conduct more effective and tailored marketing and sales campaigns.

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