

The banker's guide to winning with Industry Intelligence

How Vertical IQ helps business and commercial
bankers prospect, prepare, and close deals faster





Table of Contents

- Introduction 3
- Step 1: Determine which industries to call on 4
- Step 2: Meeting the right people & networking 5
- Step 3: Call preparation (a banker’s secret weapon!) 6
- Step 4: Assess the opportunity with precision 7
- Step 5: Stay top of mind with consistent relevance 8
- Step 6: Adding ongoing value, year-round 9
- Perfect the business advisor role with Vertical IQ 10



THE BANKER'S GUIDE TO WINNING WITH INDUSTRY INTELLIGENCE

Introduction

In today's competitive banking environment, the difference between a transactional lender and a trusted advisor lies not in products or pricing alone but in relevance, insight, and value. Business and commercial bankers are no longer judged on whether they can lend; they're evaluated on whether they understand their client's business, industry, and future opportunities.

Vertical IQ is specifically engineered to meet this challenge. Its Industry Intelligence platform empowers bankers with actionable economic and industry insights that elevate every stage of the sales process – from targeting the right industries to building enduring relationships.

At its core, Vertical IQ helps bankers speak to unique industry issues, ask questions that uncover opportunity, and engage with business owners as informed advisors ... not sales reps.

In this guide, we'll walk through the six key sales process steps and explore how Vertical IQ supports each one with relevant tools, data, and strategies.

Step 1: Determine which industries to call on



Traditionally, prospecting for new clients often felt like déjà vu: drive around, cold call, hope something sticks ... and then do the same thing again tomorrow! Thankfully, today's bankers have a better option: data-driven targeting. Instead of random outreach, use Vertical IQ to prioritize industries that align with market growth, economic trends, and your bank's strategic focus.

Vertical IQ provides Industry Profiles covering 100% of the industries that comprise the U.S economy and Canada, plus localized economic data that, when combined, reveals employment rates, business formations, revenue growth, and risk trends in specific geographies. This enables you to identify industries gaining momentum – or those under pressure – well before your competitors.

Another powerful dimension of Vertical IQ's data is understanding the client ecosystem. Each business operates within a network of suppliers, customers, and service providers. Vertical IQ's Industry Structure chapters map these relationships, revealing expanded opportunity sets beyond the initial target.

For example, a food distributor may open doors to restaurants, equipment suppliers, or logistics services, offering you a more robust business development pipeline.

Using Vertical IQ at the beginning of your sales cycle provides:

- Focused prospecting rather than scattershot calls
- Local economic context to support targeted outreach
- Deeper industry ecosystem visibility to expand sales pipelines

● WANT TO LEARN MORE?

Check out the full blog post, [“How Vertical IQ Supports the Sales Process Step 1: Determine Which Industries to Call on.”](#)

Step 2: Meeting the right people & networking



Once you've identified your priority industries, the next step is putting yourself in front of influential decision-makers and making each of those interactions meaningful.

Business owners often attend trade events, local chamber gatherings, and industry conferences to exchange ideas, and Vertical IQ's Industry Intelligence gives you a networking edge.

Instead of showing up to such events with generic talking points, bankers using Vertical IQ arrive informed with relevant insights: the latest trends, industry pressures, growth opportunities, and localized economic data points that matter to those particular business owners.

In addition to business cards, consider bringing one or two industry insights as conversation starters (e.g., wage pressures in manufacturing, or job growth in your county). These salient tidbits go beyond small talk; they get business owners talking and open real dialogue. The Industry Terminology chapter of each Vertical IQ Industry Profile also helps you speak the business owner's language, further boosting your credibility.

Networking with Vertical IQ allows you to:

- Identify pertinent industry associations and groups
- Start engaging conversations using timely industry data
- Incorporate industry terminology to build credibility and trust

● WANT TO LEARN MORE?

Check out the full blog post, [“How Vertical IQ Supports the Sales Process Step 2: Meeting the Right People & Networking.”](#)

Step 3: Call preparation (a banker's secret weapon!)

Preparation isn't optional; it's what separates meaningful, tailored conversations from forgettable, generic ones.

From financial benchmarks and operational risks to current conditions and timely industry news, Vertical IQ consolidates everything you need for call prep into one tool. Before every sales call, use Vertical IQ's Prep Sheets – concise executive summaries of key industry insights – to arm yourself with context that matters. Then select a few pertinent Call Prep Questions to get the prospect talking and sharing.

Importantly, these tailored insights fuel dialogue, not monologues, during initial meetings. Instead of asking, "How's business?", you can open with data-driven curiosity that spurs insightful conversation: "I saw your industry's labor costs have risen nationally. How has that trend impacted your local operations?"

From the perspective of a business owner, this "get the prospect talking" approach signals not just preparedness but relevance. Vertical IQ's Prep Sheets, Call Prep Questions, industry terms, and latest trends data empower bankers to guide conversations with confidence, building rapport and trust from the first minutes of a call.

Vertical IQ's call prep essentials include:

- Five-minute executive summary Prep Sheets
- Current trends and quarterly insights
- Industry-focused questions and terminology for instant credibility

• WANT TO LEARN MORE?

Check out the full blog post, ["How Vertical IQ Supports the Sales Process Step 3: Call Preparation."](#)

Step 4: Assess the opportunity with precision



After doing call prep and having that initial meeting, bankers must assess if – and how – to engage strategically with a prospect. Vertical IQ transforms this critical stage from intuition to informed analysis.

Every Industry Profile on Vertical IQ includes a Credit Underwriting and Risk chapter that outlines common financial pressures and operational challenges for companies in that industry. By comparing a business owner's individual perspective against broader industry norms, you can identify whether their pain points reflect consistent trends or unique firm-specific issues.

Vertical IQ Industry Profiles also include financial benchmarks: the latest peer data on an industry's profitability, liquidity, leverage, and efficiency metrics. Comparing your prospect's figures against these benchmarks gives you a quantitative understanding of their competitive positioning.

Finally, Call Prep Questions tailored to each industry guide discovery conversations that uncover true opportunity – not just surface-level needs.

When a banker can say, "I noticed firms in your industry are investing in technology; how are you approaching that?", the response reveals far more than generic financial questions ever could.

Assessment advantages offered by Vertical IQ:

- Risk analysis through peer and industry data
- Lifecycle insights (from startup to succession)
- Benchmarks that turn meetings into strategic, value-added conversations

• WANT TO LEARN MORE?

Check out the full blog post, ["How Vertical IQ Supports the Sales Process Step 4: Assess the Opportunity."](#)

Step 5: Stay top of mind with consistent relevance



Relationships require regular attention; they weaken when bankers wait weeks or months before reconnecting. Staying top of mind with a business owner (so you are the one they call when a need arises) requires intentional, value-driven contact, not generic “howdy doody” check-ins.

Vertical IQ makes routine client outreach meaningful ... yet simple. Mark “Favorite” industries to create customized news feeds aligned to your clients’ niches. Use these curated, easy-to-share news insights for timely email outreach that adds genuine value to the relationship.

Vertical IQ chapters like Current Conditions and Quarterly Insights also provide ready-to-share content bankers can use as periodic touchpoints, reinforcing relevance without reinventing content. These actionable Industry Intelligence tools help create a cadence of outreach that keeps you ever-present in the client’s business landscape.

Stay top of mind with timely, actionable Vertical IQ content such as:

- Personalized industry news shares
- Regular, relevant updates based on client focus topics
- Quarterly newsletters that prompt meaningful re-engagement

● WANT TO LEARN MORE?

Check out the full blog post, [“How Vertical IQ Supports the Sales Process Step 5: Stay Top of Mind by Using Industry Intelligence.”](#)

Step 6: Adding ongoing value, year-round



When done right, the sales cycle is truly a continuous loop as you consistently offer insight and solutions that add value in contextually relevant moments.

Vertical IQ helps bankers tie outreach to these natural business cycles: planning, taxes, succession conversations, and other strategic moments tied to performance and economic shifts.

- **During year-end planning**, share Vertical IQ industry forecast data to help business owners anticipate staffing or capacity decisions.
- **In tax season**, use financial benchmarks from Vertical IQ to compare a business's performance against its peers, creating an opening for advisory conversations beyond lending.
- **When succession planning arises**, provide the owner with Vertical IQ data on valuation and sale multiples to elevate the conversation into strategic territory.

In every case, Vertical IQ equips bankers to reach out at moments that matter and engage (either in their inbox or in person) with tailored, industry-specific insight, transforming outreach from routine to indispensable.

Vertical IQ content can be used as an easy-to-share value-add for:

- Client and prospect emails
- Pitchbooks and presentations
- Meeting leave-behinds
- Quarterly touchpoint communications
- Annual relationship reviews

• WANT TO LEARN MORE?

Check out the full blog post, [“How Vertical IQ Supports the Sales Process Step 6: Adding Ongoing Value, Year-Round.”](#)

THE BANKER'S GUIDE TO WINNING WITH INDUSTRY INTELLIGENCE

Perfect the business advisor role with Vertical IQ

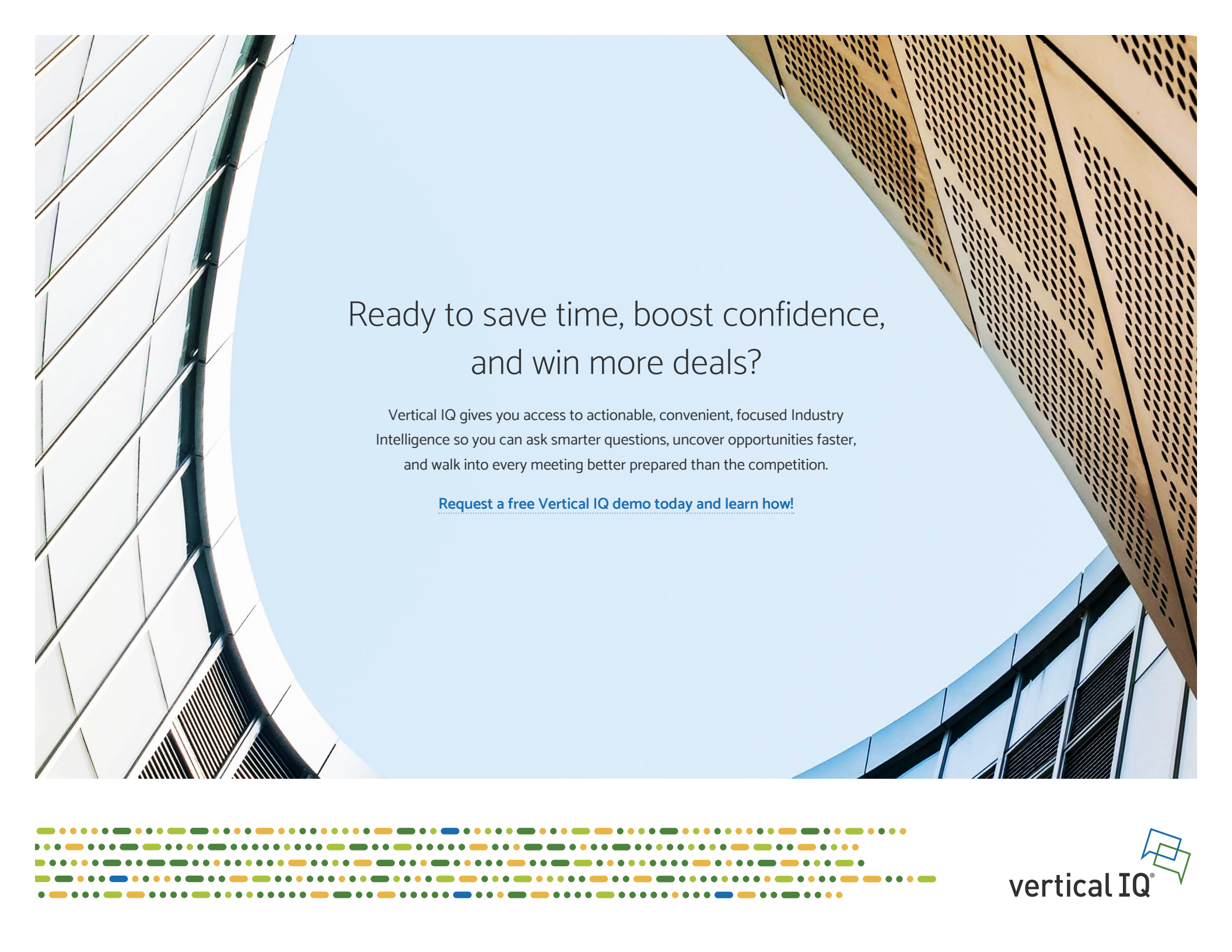
In business and commercial banking, the sales cycle isn't linear; it's a dynamic relationship continuum. Vertical IQ's Industry Intelligence supports every stage by equipping bankers with context, confidence, and meaningful data that fosters deeper understanding and more strategic conversations.

From targeted prospecting to consultative call prep, opportunity assessment, and ongoing client engagement, Vertical IQ helps bankers:

- **Know better** through actionable industry and economic data.
- **Speak smarter** with insights and language that resonate.
- **Act more strategically** with tools tailored to banking pipelines.

Ultimately, Industry Intelligence from Vertical IQ isn't just about information – **it's about the added value you can provide to your clients and prospects.** Become a banker who consistently delivers relevance and foresight – a trusted advisor who strengthens client loyalty and expands revenue opportunities across your book of business – all by using Vertical IQ.





Ready to save time, boost confidence, and win more deals?

Vertical IQ gives you access to actionable, convenient, focused Industry Intelligence so you can ask smarter questions, uncover opportunities faster, and walk into every meeting better prepared than the competition.

[Request a free Vertical IQ demo today and learn how!](#)

