

Is your UK prospect list good enough to use?

Audit a sample for company fit, contact evidence and freshness. Get a PDF checklist and an editable Excel review sheet.

DATA & RESEARCH

01

Sample

02

Check evidence

03

Review fit

04

Decide

A practical worksheet for the next account, campaign or conversation.

The problem

Your team has a long list but cannot explain why each company belongs on it or how current the details are.

What it costs the team

Salespeople spend time checking the same records, approach the wrong people and carry unresolved errors into the CRM.

What you will have at the end

A reviewed sample with explicit decisions and a list of questions to put to the data provider.

01 / THE METHOD

How do you check a B2B prospect list?

Start with a sample that reflects the businesses you intend to contact. Check company fit and the person's role, then record the source and date behind each important field. Separate records to keep, recheck or exclude. Agree your own acceptance criteria before increasing the sample.

1. Define the campaign

Write down the offer, sector, area, company size and decision-maker. Add exclusions such as existing customers, closed businesses or a service you do not provide. Keep this brief beside the audit.

2. Choose a representative sample

Include ordinary records and awkward cases: a group with branches, a recently changed company and a business with missing details. Record how you selected them. A convenient handful is not proof about the whole file.

3. Check company and role fit

Confirm the legal or trading business, website and location. Check whether the contact's role fits the decision you want to discuss. Mark an unresolved match Unknown rather than guessing.

4. Inspect evidence field by field

Record a source URL and last-checked date. A company-name match does not validate its email or phone number. A mail-server response is evidence about that check, not a promise of inbox delivery or a current job role.

5. Make an explicit decision

Exclude a known mismatch. Recheck unresolved fit, missing evidence or a disputed field. Keep records that meet the criteria you agreed. Keep a suppression and removal process alongside the list.

6. Run the real workflow

Ask one seller to find a company, explain the fit and choose a next step using the sample. Check whether the export keeps the fields your CRM needs. Record the friction before buying more.

7. Review the findings

Count specific issues rather than inventing one accuracy score. Ask the provider how it will resolve the issues and when an update will be available. Keep the original sample for comparison.

02 / PUT IT TO WORK

Worked example: an accountancy campaign

A managed IT provider wants independent practices with five to twenty staff in South Yorkshire. A record has a real company and a valid-looking email, but the website describes a national group and the contact left last year. The right action is Exclude or Recheck under the campaign brief. A successful server check would not resolve either fit problem.

Questions to work through

Situation	Which businesses can use our service, and who usually owns the decision?
Problem	Which fields would prevent a seller from taking the next step?
Implication	What work gets repeated when this detail is wrong?
Need-payoff	What evidence would let the seller act without checking the whole record again?

Before you use it

- Every sampled row has a reason for its decision.
- Unknown information remains visible.
- The sample findings are reported with their denominator.
- A person owns each issue that must be resolved.

These examples are illustrative. They are not customer results or recommended performance benchmarks.

03 / YOUR WORKSHEET

Apply it to your next piece of work

Use the editable worksheet in this download, or write your answers here. Keep facts, decisions and unresolved questions visible.

Campaign and exclusions

Sample method and number of records

Company and contact fit

Evidence URL and checked date

Unresolved or disputed fields

Keep, Recheck or Exclude with reason

Owner and action before launch

Sources and further reading

[Companies House company search](#). Check company identity, status, officers and filings against the original record.

Use the same work in Adapt

Keep the company context and the next step together as the team moves from research into a conversation.

[See evidence on an Adapt record](#)