Profiler

What does Profiler do?

Profiler takes a company name or list of companies and automates the time consuming task of finding people, news, press releases, and contact information in conjunction with the Internet. Think of it as the replacement to manually browsing company websites.

How does Profiler relate to the other products in the Suite we purchased?

Most Broadlook tools can send information to the Profiler tool. Job Pulse helps you export a list of companies that are hiring for a specific position. Eclipse helps you export an online list or directory. Market Mapper allows you to export your hand made list. No matter what source, Profiler will convert what could be as little as a company name and website into actionable information and contacts. Profiler will also allow you to export contact information directly to your CRM, ATS, or contact manager application.

What are the three main areas of Profiler?

1. Search Plans Area: Allows you to organize and manage multiple lists of companies.
2. Company Grid: Shows you the companies that are in the current search plan folder.
3. Profiler Tabs: These tabs show you the results of your searching.

How do I create a new search plan?

Create a folder using the New Plan button for a specific industry you are researching. If you have and existing list of companies you can import it from the File menu. If you do not have an existing list you can create one with Ballista or Eclipse and then export it into Profiler. You can also add companies one by one to your plan by using the New Company button.

How do I research the companies once my Plan is created?

Now that you have a list of companies, select the folder you want researched and select the Run Plan button. If you just want to research a single company, use the Quick Search button. You will now see your screen change and numbers will fluctuate up and down until the plan is fully researched. Once it is completed your screen will change back and there will be a checkmark in the box next to the company name.

“I am only interested in the marketing people, what are all these other contacts?”

The Profiler will find ALL of the contacts associated with the company you are searching. To narrow down the scope of your search you will want to use the Hotlist tab. This will allow you to preview contacts that you hand-select or move to the hotlist based on title before exporting them to your database. To put contacts on the Hotlist one-by-one from the Contacts Tab. Right-click on a contact row and select the Send to Hotlist button.

You can also send a group of contacts to the Hotlist based on their title. Use the Send to Hotlist button on the top toolbar of Profiler and follow the wizard steps. When completed your Hotlist tab will contain new contacts based on the criteria you specified.

How do I export contact data from Profiler to my CRM / ATS database?

Select the Export Wizard button from the top toolbar to export contact data. You have several options as to what records to export: the company(s) you have highlighted, the contacts you have highlighted, all the companies in your Plan or everything on your Hotlist. It will then ask you to filter the records you are exporting, the final steps are unique to the export target your are sending data to, for example if you are sending data to Excel you will need to configure the columns that appear in your spreadsheet.

What is in the Contacts tab?

In the Contacts tab you will find information such as: names, titles, email addresses, phone numbers, addresses and biographies for everyone found relating to a single company in your Plan.

What is the Score column in the Contacts tab?

The Score column will tell you how accurate the information is. Example: a name that was found on 3 different pages relating to that company will have a higher score than a name that was only found once. If you look in the lower left hand corner of Profiler it will show you exactly where the data was found and how many times. You can click on these links and it will take you directly to the webpage.

What is in the Profile tab?

In the Details tab you find information such as: demographics of the company address, company affiliations found on their website, biographies in a more readable format and the website’s Whois record. The Whois record tells you who the main admin contact is.

What is in the Events tab? Trigger Events.

The Events tab contains links for that company relating to specific Trigger Events that you select. This allows you to watch all the companies in your Plan for events that may trigger a buying sign to help you qualify them as a prospect. To customize your Trigger Events right click in the left column. Create a folder for a buying sign with keywords or phrases relating to that buying sign. Examples: expansion, new product, job opening, moving, merger, etc…

What is in the News tab?

Profiler searches 3500 news sources to find news articles and press releases containing the company's name. You can click on the URL to read the article.

What is in the Locations tab?

The locations tab is used for when your company may list multiple branch locations. When looking at the locations tab you will see an export locations button that will allow you to quickly get out a list of the locations to your CRM, ATS or excel.

What is in the About tab?

The About tab allows the user to quickly identify the important areas of the companies focus. As Profiler goes out to the companies website, it will pull back self descriptive phrases and give the end user a chance to know more about the company.

What is in the Hoovers tab?

This tab is limited to those users with the ProfilerX version. The Hoovers tab will pull information into it from the Premium Hoovers subscription level and allow you to see not only what is out live on the companies website, but also what is on the Hoovers database of editorial content.

What are the Tool Settings that I can alter?

Limits-homepage search depth: 10, tells Profiler how many pages deep to search
Limits-pages to extract: 2500, total number of pages to search
Limits-max file size: 500, amount of data stored (increase if PDF's are on the website)
Network-throttle bandwidth: 5-500, lower if you are sharing internet connection with others increase if you are not or are running searches at night when no one else is in the office.

What if I still have questions?

- Visit our client center at http://www.broadlook.com/clientcenter/ and gain access to PDF files, interactive tutorials, recorded demos and signup for live weekly trainings!
- Contact the Broadlook Technical Support Department at 262-754-8080 or cs@broadlook.com