

“XYZ” Consulting

Ai Chat Conversation and Research

Suggested at Client Meeting on 2/10/26

Statement / Question we “seeded” into Ai tool:

As part of our sales strategy, we are targeting the following sectors: healthcare, information technology and construction. We want to narrow down the sectors as they are too broad as is. We also have our three pillars of services: C-Suite Risk Mitigation, Financial Alignment and Continuous Improvement. These sit under our categories of services: consulting, coaching and speaking. We are getting support from our local SBDC to conduct market research for us and they are asking for more specific information so we can develop a prospect list. On the “for profit” side, our criteria includes those organizations in our main sectors that are north of \$5 million in revenues and in a growth mode. For nonprofits, we are generally looking at nonprofit organizations with budgets of up to to \$15 million as one tier, \$16 million to \$40 million as a second tier, and over \$40 million as a third tier. Q: The current question is where do we go to find a list of companies that best fit this criteria? Also which organizations are most likely to latch onto our unique positioning statement of "we help leaders with risk management pain points before they become costly surprises".

Ai Response:

This is a smart inflection point. Right now your sectors are **verticals**, but your positioning is really about **situational pain + leadership maturity level**.

Let’s break this into two parts:

1. **Where to get the lists**
2. **Who is most likely to resonate with your positioning**

1 Where to Find Lists That Match Your Criteria

You’re looking for:

- For-profit companies
 - Healthcare, IT, Construction
 - \$5M+ revenue
 - In growth mode
- Nonprofits
 - Tiered by budget size
 - Likely experiencing complexity growth

Here are the most practical list sources your SBDC can use.

For-Profit Data Sources

1. Dun & Bradstreet

- Search by:
 - Industry NAICS codes (narrow by sub-sector)
 - Revenue bands
 - Employee count
 - Geography
- Strong for \$5M+ revenue filtering

2. ZoomInfo

- Ideal for:
 - Growth indicators (recent funding, hiring trends)
 - Leadership contacts (CFO, COO, CRO)
- Helpful for targeting C-suite risk conversations

3. LinkedIn Sales Navigator

- Filter by:
 - Company size
 - Headcount growth (last 12 months)
 - Revenue estimates
 - Industry niche
- Excellent for identifying “growth mode” companies

4. PitchBook (if accessible)

- Best for:
 - Private equity-backed firms
 - Companies that recently raised capital
- PE-backed = risk + governance pressure + growth expectations

5. GuideStar (for nonprofits)

- Filter by:
 - Budget size
 - State
 - NTEE code (mission category)
- Excellent for your nonprofit tiering model

6. State-Level Sources

- Secretary of State filings
- State healthcare licensing databases
- State contractor licensing boards
- SBDC regional economic development lists

These are useful if you want regional concentration.

2 Narrowing Your Sectors (This Is Critical)

Right now:

- Healthcare
- Information Technology
- Construction

These are too broad to generate sharp messaging.
Let's narrow them into **risk-dense subsegments**.

HEALTHCARE — Where Risk Pain Is Real

Best Subsegments for You:

1. Physician-Owned Medical Groups (\$5M–\$50M revenue)

- Multi-location practices
- In growth through acquisition
- Facing reimbursement shifts, compliance risk

2. Behavioral Health & Addiction Treatment Centers

- Highly regulated
- Rapid growth sector
- Reimbursement + compliance blind spots

3. Senior Living Operators

- Operational + financial risk exposure
- Workforce volatility
- Liability exposure

These groups:

- Feel risk
 - Often lack formal ERM
 - Are in scaling mode
 - Have CFO-level sophistication
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INFORMATION TECHNOLOGY — Refine It

Instead of “IT,” consider:

1. Managed Service Providers (MSPs)

- \$5M–\$50M revenue sweet spot
- Cyber risk exposure
- Contractual liability risk
- Growing through acquisition

2. Government IT Contractors

- FAR compliance
- Rapid scaling
- Margin pressure
- Risk of audit surprises

3. SaaS Companies in Growth Stage

- Revenue recognition complexity

- Cyber risk
- Investor pressure
- Scaling operational controls

These align strongly with:

- Financial Alignment
 - C-Suite Risk Mitigation
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CONSTRUCTION — Strong Opportunity Here

Best subsegments:

1. Commercial General Contractors (\$10M–\$100M)

- Bonding capacity risk
- Cash flow volatility
- Project cost overrun risk
- Safety liability exposure

2. Specialty Subcontractors

- Rapid scaling risk
- Contractual blind spots
- Working capital exposure

Construction firms in growth mode often:

- Outgrow internal controls
- Lack formal risk frameworks
- Have CFOs overwhelmed by operational speed

This is a *very* strong alignment with your positioning.

Nonprofits Most Likely to Resonate

Your message:

“We help leaders with risk management pain points before they become costly surprises.”

The nonprofits most likely to latch onto this are:

Tier 1 (\$0–15M budgets)

- Regional healthcare nonprofits
- Workforce development organizations
- Charter school networks
- Behavioral health nonprofits

Pain: informal risk processes, heavy founder dependence.

Tier 2 (\$16M–\$40M)

This is your GOLD ZONE.

- Multi-location human services agencies
- Community health centers
- Education networks
- Housing & social service orgs

These organizations:

- Have complexity
- Have CFOs
- Have boards asking harder questions
- But rarely have formal ERM

Tier 3 (\$40M+)

- Hospital systems
- Large national nonprofits

More bureaucracy.

Longer sales cycles.

But strong speaking/coaching opportunity.

Who Will Respond Fastest to Your Positioning?

Your strongest resonance segments:

1 Construction Firms in Growth Mode

They feel risk daily.

2 Behavioral Health Organizations

Regulatory risk is constant and existential.

3 Private Equity-Backed MSPs or Government IT Contractors

They have pressure from investors + compliance scrutiny.

5 Refined Targeting Strategy Recommendation

Instead of 3 giant sectors, position as:

Primary Vertical Focus:

1. Growth-Stage Construction Firms
2. Behavioral Health & Community Healthcare Organizations
3. Mid-Market IT Service Providers (MSPs + Gov Contractors)

Now your SBDC can:

- Pull NAICS codes for these narrow segments
 - Filter by revenue
 - Filter by employee count
 - Layer growth indicators
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6 Additional Strategic Insight (Important)

You are NOT selling “risk management.”

You are selling:

- Fewer board surprises
- Stronger financial narratives
- Growth without hidden landmines
- CFO credibility

The organizations most likely to engage are those experiencing:

- Recent acquisition
- Rapid hiring
- Geographic expansion
- Regulatory changes
- Leadership transition
- Preparing for sale
- Preparing for debt financing

That is the real trigger list your SBDC should search for.

Second Answer from Chat

IDEAL CLIENT PROFILE (ICP)

Message map developed in client session 2/10/2026

Core Positioning

We help growth-oriented leaders identify and address risk management pain points before they become costly financial or reputational surprises.

A. For-Profit ICP

Revenue Criteria

- Minimum: \$5M annual revenue
 - Ideal range: \$10M–\$75M
 - Growth mode:
 - Hiring expansion
 - Multi-location expansion
 - Acquisition activity
 - Preparing for financing or exit
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Leadership Structure

- Has a CFO or Controller
 - CEO actively involved in strategic growth
 - Board of Directors or Advisory Board present (preferred)
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Risk Triggers (High Probability Prospects)

- Rapid scaling
 - Increased regulatory exposure
 - Complex contracts
 - Debt financing
 - PE backing
 - Bonding capacity concerns (construction)
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B. Nonprofit ICP

Tier 1: \$0–\$15M

- Founder-led organizations
- Limited formal internal controls

- High grant dependency

Tier 2 (Gold Zone): \$16M–\$40M

- Multi-site operations
- CFO in place
- Growing board expectations
- Increasing compliance complexity

Tier 3: \$40M+

- Speaking & coaching opportunities
 - Long consulting cycles
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NAICS CODE SHORTLISTS

 Construction (Primary High-Alignment Vertical)

Commercial General Contractors

- 236220 – Commercial & Institutional Building Construction

Specialty Trade Contractors

- 238210 – Electrical Contractors
 - 238220 – Plumbing, Heating & AC Contractors
 - 238990 – All Other Specialty Trade Contractors
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 Healthcare (Refined)

Physician Groups


- 621111 – Offices of Physicians (except Mental Health)
- 621112 – Offices of Physicians, Mental Health

Behavioral Health

- 622210 – Psychiatric & Substance Abuse Hospitals
- 623220 – Residential Mental Health & Substance Abuse Facilities
- 621420 – Outpatient Mental Health & Substance Abuse Centers

Senior Living

- 623110 – Nursing Care Facilities
 - 623311 – Continuing Care Retirement Communities
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 IT / Technology (Refined)

Managed Service Providers (MSPs)


- 541513 – Computer Facilities Management Services
- 541512 – Computer Systems Design Services

Government IT Contractors

- 541519 – Other Computer Related Services

SaaS Companies

- 511210 – Software Publishers
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 Nonprofit NTEE Categories (for GuideStar / Candid searches)

- E21 – Community Health Systems
- F20–F33 – Mental Health & Crisis Services

- B20 – Elementary & Secondary Schools
 - L20 – Housing Development
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3 PRIORITIZED TARGET MATRIX

Here's how to rank opportunity based on:

- Pain intensity
 - Ability to pay
 - Speed of decision
 - Alignment with your pillars
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Tier 1: Growth-Stage Commercial Construction Firms

Why?

- Cash flow volatility
- Bonding capacity pressure
- Safety & litigation exposure
- Contract risk
- CFO overwhelmed by operational speed

Alignment:

✓ C-Suite Risk Mitigation

✓ Financial Alignment

✓ Continuous Improvement

These firms feel risk immediately in their P&L.

Tier 2: Behavioral Health Organizations (\$15M–\$40M)

Why?

- Regulatory intensity
- Reimbursement volatility
- Board governance pressure
- Founder-to-CEO transition common

Alignment:

✓ Risk Mitigation

✓ Financial Alignment

✓ Board-level speaking

Tier 3: MSPs & Government IT Contractors

Why?

- Cyber liability
- Contract compliance
- Margin compression
- Scaling risk

These firms understand risk intellectually — but often lack structured ERM.

■ Tier 4: Senior Living Operators

Strong risk, but often:

- Thin margins
 - Operational chaos
 - Slower consulting cycles
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4 If You Were to DOMINATE ONE SECTOR First

Recommendation:

Commercial Construction Firms (\$10M–\$75M Revenue)

Here's why:

1. They experience risk in tangible ways.
2. Financial alignment is critical (bonding, cash flow, WIP reporting).
3. Growth often outpaces controls.
4. CFOs feel isolated and overextended.
5. Speaking opportunities at contractor associations.
6. Lower bureaucracy than healthcare.

Your messaging lands strongly here:

“We help growth-stage construction leaders eliminate risk blind spots before they derail projects, bonding capacity, or profitability.”

This is extremely clear and marketable.

5 Where to Pull “Growth Mode” Lists

In addition to revenue filtering, instruct SBDC to layer:

- Companies hiring 10%+ year over year
- Recently awarded large contracts (construction)
- Recently received PE investment (IT)
- Opened new locations (healthcare)
- Recently appointed new CFO/CEO

Those are trigger indicators.

6 Strategic Clarification: Your True Target

You are not targeting industries.

You are targeting:

Organizations transitioning from informal growth to institutional maturity.

That is your real niche.

7 Next Step (Highly Recommended)

Now that you have this clarity, the next move should be:

- Develop a vertical-specific landing page for the first chosen sector.
- Create a 3-part speaking topic set tailored to that vertical.
- Build a 50-company prospect pilot list in one geographic region.
- Run direct outreach + LinkedIn content specific to that niche.