

Location Type Filter: Decision Memo

To: Damione
From: Lead Pipeline Team
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Re: Optimizing Contact Search for Vending Services Territory Coverage

We need your input on which location filter strategy to use when searching for potential vending service clients in an operator's territory. This decision affects how many leads we find and the quality of those leads.

The Question: When searching for contacts within a 15-mile radius, should we require that both the contact AND their company headquarters be in the territory, or just the contact?

Background

ZoomInfo's Contact Search API offers different "Location Type" filters that determine which contacts are returned:

Location Type	What It Means
Person AND HQ	Contact's work location AND company headquarters must BOTH be in the search radius
Person	Only the contact's work location must be in the radius (HQ can be anywhere)
Combined	Run both searches and merge results

Test Results: Northbrook, IL (ZIP 60062, 15-mile radius)

We ran identical searches with both filters. Same ZIP codes, same industries, same quality filters.

Metric	Person AND HQ	Person Only	Difference
Companies Found	46	56	+10 (+22%)
Contacts Found	79	80	+1

What "Person" Finds That "Person AND HQ" Misses

These companies have employees working at physical sites in the territory, but their corporate headquarters is elsewhere:

Company	Contact	Title	Why They Appeared
LOGISTEED America	Christopher Baillie	Branch Manager	Japanese logistics company with Chicago branch
Farrow	Lorrie Roddy	Branch Manager (Chicago)	Canadian company with Chicago branch
Caterpillar	Filip Marek	Division CFO	HQ in Peoria, IL - office in territory
Caremark (CVS)	Dawn Matras	Director, Specialty Customer Care	HQ in Rhode Island
The Hoxton	Amos Kelsey	General Manager	UK hotel chain with Chicago property
Crowne Plaza	Cher Jacobsen	General Manager	IHG hotel with local property
Pampered Chef	Bikram Sohi	COO	Berkshire Hathaway subsidiary
WillScot	A.J. McGrath	VP and General Manager	HQ in Phoenix, AZ
Canadian Alliance Terminals	William McKinnon	President	Canadian company with Chicago operations
Barrett Distribution	Arthur Barrett	President	HQ in Massachusetts

Key Observation: Many of these are **branch managers** or **local general managers** – people who likely CAN authorize vending for their specific facility.

What "Person AND HQ" Finds That "Person" Misses

These companies appeared in the Person AND HQ search but not in the Person-only search (due to result ranking/pagination):

Company	Contact	Title
Loyola Academy	Lynn Egan	Director, Communications
Wespath Benefits	Christopher Wampler	Director, Project Management
Harper College	Riaz Yusuff	Chief Information Officer
Northwest Community Healthcare	Randi Zitron	Director, HR
Prospect Heights School District 23	Christopher Alms	Director, Technology
Radio Flyer	Amy Bastuga	Chief People Officer
ITW	Randall Scheuneman	VP & Chief Accounting Officer

Key Observation: These are **local institutions** (schools, colleges, healthcare) where the contact likely has direct authority.

The Trade-Off

Option A: Person AND HQ (Current Manual Process)

Pros

- Higher confidence the contact has local decision authority
- Avoids "that's a corporate decision" responses
- Filters to truly local businesses
- Matches our existing manual workflow

Cons

- Misses branch offices of national chains
- Lower volume (46 vs 56 companies in test)
- May miss legitimate opportunities at regional facilities

Best For: Prioritizing quality over quantity; focusing on owner-operated or locally-headquartered businesses

Option B: Person Only

Pros

- 22% more companies found
- Captures branch offices and regional facilities
- Finds contacts who physically work at sites in the territory
- Branch managers often CAN authorize vending for their location

Cons

- Some contacts may need to escalate to corporate
- May include facilities with national vending contracts
- Slightly more filtering needed during outreach

Best For: Maximizing coverage; willing to handle some "call corporate" responses

Option C: Combined (Run Both, Merge Results)

Pros

- Maximum coverage — gets local companies AND branch offices
- No companies missed due to ranking/pagination
- Estimated 60-70 companies (vs 46 or 56 alone)
- No additional cost (ZoomInfo only charges for enrichment, not searches)

Cons

- More contacts to review and qualify
- National chains often have inaccessible corporate decision makers
- Branch managers may lack authority despite local presence
- Implementation complexity

Best For: Comprehensive territory coverage when operators are willing to navigate corporate procurement processes

Concrete Scenario: Making a Sale

Scenario 1: Local Business (Person AND HQ)

You call **Wilmette Park District**. Jeffery Groves, General Manager of Recreation Facilities, answers.

"Yes, I can make that decision. Let's set up a meeting."

Result: Direct path to sale.

Scenario 2: Branch Office (Person Only)

You call **LOGISTEED America** (Chicago branch). Christopher Baillie, Branch Manager, answers.

"I manage this facility. Vending is my call for this location."

Result: Direct path to sale for that facility.

Scenario 3: Branch Office with Corporate Control

You call **Caremark (CVS)**. Dawn Matras, Director, answers.

"Vending is handled through our corporate facilities team in Rhode Island."

Result: Dead end or long sales cycle.

Our Recommendation

We recommend starting with **Option A (Person AND HQ)** as the default, with the ability to switch to **Option B (Person)** when:

- An operator's territory has few results with Person AND HQ
- The operator is willing to pursue national chain locations
- The target is 75+ companies and Person AND HQ yields <50

This matches the manual process that's been working, while giving flexibility for territories that need more volume.

Questions for Your Decision

1. **Volume vs. Quality:** Is finding 22% more companies worth potentially more "call corporate" responses?
2. **National Chains:** Are branch locations of national chains (hotels, logistics, healthcare systems) viable targets, or do they typically have corporate vending contracts?
3. **Operator Preference:** Should operators be able to choose their preferred filter, or should we standardize?
4. **Combined Approach:** Is the additional review time worth it to get maximum coverage, knowing many national chain contacts may be dead ends?

Next Steps

Once you provide direction, we will:

1. Set the appropriate default in the system
2. Document the guidance for operators

3. Optionally implement the combined approach if desired

Please let us know which approach you'd like us to proceed with.

Prepared by the Lead Pipeline Development Team