



Corporate Procurement Strategy Tool: ESE Corporate Customer Profiling

Overview & Purpose

Your business has the power to choose who you conduct business with. For ESEs, it is especially important that your business partners align with and support your double-bottom-line efforts. The questions below are designed to help you think critically about how and who you'd like to work with to create your target customer profile and ultimately help you identify which businesses are the right customers for your ESE. This is a non-exhaustive list. You may need to add additional criteria if there are other elements about your business that are important to consider.

Instructions

Complete this sheet with your business development team. Discuss your answers and identify where there might be flexibility. After you have your customer profile, you can try the suggested Generative AI prompt to see if you can identify businesses that meet your needs. Edit the prompt to match your requirements and ESE profile.

Venture Criteria & Customer Profile Identification

Company Attributes	
Preferred Business Type	Corporate Small or Medium Enterprise Nonprofit Government or Municipality
Preferred Industry(ies) – <i>list all that apply</i>	
What does the company need to buy? <i>List the appropriate purchasing categories for your business</i>	
Notes:	



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Mission Alignment		
Do they need to focus on social impact?	<i>Explain:</i>	Yes No
<i>If yes:</i>		
Does their work have to align with your mission?	<i>Explain:</i>	Yes No
What additional causes would you want them to support?		
Do they need a specific connection to your beneficiary population?		
Are there any red flags or non-negotiables related to company priorities and community engagement?		
Notes:		

Location		
Does the corporation need to be headquartered or have a physical presence in your local region?	<i>Explain:</i>	Yes No
Do they need to be physically in a region that is important to you?	<i>Explain:</i>	Yes No
What regions can you reliably provide service?		
Are there any regions that you need or want to avoid?		
Notes:		



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Compliance			
Which of the following information requests or compliance terms are you willing to adhere?			
Proof of Ownership	Maybe	Yes	No
Privacy Review (data systems)	Maybe	Yes	No
Employee Background Check	Maybe	Yes	No
ESE Financial Background Check	Maybe	Yes	No
Organization Risk Analysis	Maybe	Yes	No
Is your ESE willing to acquire a certification to obtain a contract?	Maybe	Yes	No
Notes:			

Payment Terms				
What is your preferred method of payment?	Direct Depositing Banking Credit Card Check Other Online Finance System (Zelle, Venmo, etc.)			
How often do you want (or need) to be paid?	Weekly	Monthly	Quarterly	Other
What are your ideal payment terms?	At-Ready Net 90	Net 30	Net 60	
Do you require a deposit in advance of providing goods or service?	Maybe	Yes	No	
If the company cannot provide a deposit, would you still take the contract	Maybe <i>Explain:</i>	Yes	No	
Do you require an executed contract for your product or service?	Maybe	Yes	No	
What is the target range payment for an initial contract?	Less than \$1000 \$1,001-5,000			



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	\$5,001-10,000 Greater than \$10,000
Notes:	

Sample AI Prompt for Customer Identification:

You can edit this prompt as needed. Items in orange should be updated with information from above.

You are a strategic sourcing expert who specializes in helping mission-based businesses such as Employment Social Enterprises secure contracts with large corporations. You must help the **ESE Name** identify **five target corporations** that meet the following criteria as it relates to **the business practices, social impact initiatives, location, payment terms and supplier risk and relationship management activities**. List the companies individually and give your reasoning as to why they are the best fit for the previous criteria. Include any names and contact information of procurement and sourcing staff who would be ideal to contact directly about procurement opportunities.