

Data & Market Intelligence

Leveraging Data & Analytics to Grow your Business

Bank Director Small Business Summit
May 4, 2026

Martin Wise
Executive Chairman & Founder, RelPro

RelPro[®]
make the connection

Topics for Today

- ✔ Why Market Intelligence matters more than ever
- ✔ How small businesses can uncover real opportunities
- ✔ Turning data into actionable growth strategies
- ✔ Practical tools and workflows to gather intelligence
- ✔ How AI benefits small business data & analytics initiatives
- ✔ Leveraging your professional network for market intelligence

Market Intelligence Defined

Market Intelligence = data + context + action

- ✔ Where is my next best customer?
- ✔ Which industries are growing?
- ✔ Who are the key decision makers?
- ✔ What are my competitors doing?
- ✔ Where should I invest next?

Where Growth Opportunities Hide

Growth opportunities typically fall into five areas:



1. Expanding relationships with existing customers



2. New customers in existing markets



3. New industries with similar needs



4. Geographic expansion



5. Partnership ecosystems

Turning Data into Strategy

- Industry growth
- Company size
- Strategic fit
- Buying signals
- Relationship access



Ways Small Businesses Gather Market Intelligence



Industry reports



Government data



LinkedIn



Trade associations



News monitoring



CRM data



Market intelligence platforms



The challenges are

FRAGMENTATION

and

TIME



How to Make Data Dance & Sing for You!



Company Firmographics

Revenue, # Employees, Industry,
HQ Location



Filings & Funding

UCC, SBA (7a, 505, PPP), PE/VC,
5500, 990, CRE, Gov. Contracts



Segmentation

MBE/DBE, Census Tract,
Medical Practice

The screenshot displays the RelPro software interface. At the top, there's a navigation bar with tabs for 'Overview', 'Profile', 'Activity', 'Alerts', 'Local Market Research', and 'Saved Profiles'. The main content area is divided into several sections: 'Description' (with a 'Details' button), 'Financials' (with a 'Details' button), 'Employees' (with a 'Details' button), 'Licensing' (with a 'Details' button), 'Company Filings' (with a 'Details' button), and 'Executive Profiles' (with a 'Details' button). A 'Signals, Triggers, Alerts' section is highlighted at the bottom, showing a notification bell icon and a list of alerts. The background features a network diagram with green nodes and lines.



Executive Profiles & Contact Details

Job Title / History, Email, Phone #,
Board Affiliations, Wealth

Actionable Research

Industry Research, Market Research

Network Connections

Relationship Linkages
("who knows who")

Signals, Triggers, Alerts

Buyer Intent, Job Moves, Company Announcements

How to Make Data Dance & Sing for You!

Signals, Triggers, Alerts




Data Enrichment & Cleansing (DataBricks, APIs, Webhooks)



AI Transforms Data & Market Intelligence

AI is enabling Small Businesses
to “punch above their weight” in data analytics

Machine Learning 

 Conversational AI

Generative AI 

 Agentic AI



But it's still all about the data!

Leveraging Your Professional Advisor Network



Business Bankers

Wealth Advisors

Accounting Firms

Lawyers



Key Topics for Discussion

- ✓ Industries gaining momentum
- ✓ Companies preparing for transactions
- ✓ Regulatory shifts
- ✓ Emerging risks
- ✓ Succession Advice

Actionable Steps

- Ask better questions
- Share your strategy
- Make introductions
- Leverage introductions

Key Takeaways



Data really is the new oil



Identify the data (& new data) to uncover growth for your business



Establish clear accountability for data governance & stewardship



Leverage your data assets – store once & leverage many times