Data Sourcing and Screening Process

LEAD APPROVED
FOR CLIENTS
OCTOBER 2026

Sourcing and Screening

Lead Approved.

ABOUT THIS DOCUMENT

This document sets out how Lead Approved builds, checks, screens, calls and looks after prospect data for client calling campaigns, from the first company search to deletion at the end of the engagement. It sits alongside our Dialling Services Agreement, in particular the Compliance, Confidentiality and Data Protection sections and the Data Processing Terms in Schedule 1.

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1. HOW WE WORK

(a) Business contacts only. We call people in their work role, about their business.
(b) Built to the agreed strategy. Every list follows the target market, signals and exclusions agreed with the client.
(c) Nothing is enriched or dialled until the client approves the list.
(d) Every number is screened against TPS and CTPS before it is called.
(e) Anyone who asks not to be contacted again is never called again.
(f) The campaign data belongs to the client and is transferred to them at the end of the engagement.

2. SOURCING COMPANIES

We build the full market first, pulling every source at the same time, then combine the results and remove duplicates. Our sources are:

(a) Airscale, our business data provider, for company records filtered by industry, size, location and keywords.
(b) Apify, for public business data such as Google Maps listings, business directories and company databases.
(c) Clay, for company research and enrichment across multiple data providers.
(d) LinkedIn company data, retrieved through our data tools.
(e) Public registers and directories, such as Companies House, industry regulators, trade associations and member lists.

We never bypass a website's bot protection or access controls. Where a source lists a brand or trading name, we resolve it to the operating company.

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3. CHECKING AND GRADING

Every company is checked against each criterion and signal in the agreed strategy, and each check is recorded in its own column with the result or the reason. Signals are the evidence that a company is a good fit to call now, such as hiring, growth, new funding or recent activity, and they set the order in which companies are called.

Every company keeps a status of Qualified, Likely Qualified, Needs Verification, Likely Excluded or Excluded, with the reason. Excluded companies are never deleted from the record, so the client can see everything we looked at and why.

The client's do not call list, including current clients, live proposals and anyone who has opted out with them, is applied to every row before any contact work begins. We then size the qualified list against the contracted number of dials, and tell the client plainly if it falls short.

4. FINDING THE RIGHT PERSON

For each qualified company we find the decision maker named in the strategy, using Airscale people data and LinkedIn profile data retrieved through our data tools. We never browse or message anyone on LinkedIn by hand.

Every contact's title is read from their current LinkedIn profile, and we check that they still work at the company, that they are based in the target country, and how long they have been in the role. Roles outside the strategy, such as sales or operations roles where they are not the buyer, are removed. Contacts from weaker sources are flagged for checking before they are called, and we keep to the number of contacts per company agreed in the strategy.

5. CLIENT APPROVAL

The full list is shared with the client in a Google Sheet in their own campaign folder. It shows each company and contact, every check and signal, the reason to call and a short research note for the caller, with a How We Built This tab and the full list of every company reviewed. Nothing is enriched or dialled until the client approves it.

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6. ENRICHMENT AND VALIDATION

Only after approval do we add contact details.

(a) Mobile numbers are found through Airscale from each approved contact's profile. We use mobiles only and never fall back to switchboards or general lines.
(b) Business email addresses, where needed, are found and verified through Kitt, our email verification provider.
(c) Missing or invalid numbers are replaced with the next approved contact in priority order, and the gaps are reported to the client.

7. TPS AND CTPS SCREENING

Every number is screened against the Telephone Preference Service (TPS) and the Corporate Telephone Preference Service (CTPS) using the UKPhonebook TPS Checker before anything is loaded into our dialling system.

(a) Each contact is marked Clear to call or Registered, removed, with the date it was screened.
(b) Registered numbers are removed and added to our suppression list. They are never called.
(c) Only Clear to call contacts are loaded into the dialler.
(d) Numbers still being called are re-screened at least every 28 days.
(e) The client receives the screening summary with the list, showing how many numbers were checked and how many were removed.
(f) For campaigns outside the UK, numbers are screened against that country's national do not call register before they are dialled.

8. LOADING THE DIALLER

Approved, screened contacts are loaded into our dialling system, GoHighLevel, and tagged by campaign and list, so the caller dials only the approved batch. Each contact carries the research note from the approval sheet, so the caller knows why they are calling and what to lead with.

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9. MAKING THE CALLS

(a) Calls are made in business hours, and never outside 8am to 9pm in the prospect's local time.
(b) Callers use a valid local caller ID.
(c) Callers use only the script, claims and materials the client has approved, and say who they are and why they are calling.
(d) Where a call is recorded, the caller tells the person. Calls are transcribed so the client receives accurate notes.
(e) If someone is busy or is not the right person, the caller asks for a better time or the right contact and logs it. We never pressure anyone into a meeting.

10. CALL OUTCOMES

Every call is logged against the contact in our dialling system with one of these outcomes:

(a) No Answer, including voicemail and call screening.
(b) Gatekeeper, where we reached the company but not the contact.
(c) Not Interested.
(d) Qualified, Not Booked, where the contact fits but a meeting is not yet agreed.
(e) Booked Meeting.
(f) Bad Number, where the number is wrong or no longer in use.
(g) Do Not Contact, where the person asks not to be called again.

Callbacks, referrals to a colleague and requests for information are logged with the caller's notes. Booked meetings and information requests are handed to the client with the caller's notes. We never email the client's prospects ourselves.

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11. OPT-OUTS AND SUPPRESSION

If anyone says they do not want to be contacted again, the caller ends the call politely and:

(a) Marks the contact Do Not Contact in our dialling system straight away, which stops any further calls to that number.
(b) Adds the number to our suppression list, so it is never loaded again for that client, including after a re-screen or a new list.
(c) Shares the opt-out with the client in the next report, so their own team respects it too.

Bad numbers, and contacts who have left the company, are removed from the list and reported to the client.

12. NOTES, TRANSCRIPTS AND REPORTING

Every conversation is transcribed. We review calls against the script to improve the messaging, and share call notes, outcomes and transcripts with the client every week. Booked meetings are passed to the client with the caller's notes as soon as they are booked.

13. WHERE THE DATA IS KEPT

(a) GoHighLevel, our dialling system: contacts, call outcomes, call notes, recordings and transcripts.
(b) Google Workspace: the client's campaign folder, including the approval sheet, call lists and reports. The client has access to this folder throughout.
(c) Slack: our internal call notes for each campaign.
(d) Working files from the data build are kept only on company devices.

Access is limited to the Lead Approved team working on the campaign, each with their own login. Airscale, Apify, Clay, Kitt and UKPhonebook are used only to find, check and screen data.

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14. END OF THE ENGAGEMENT: TRANSFER AND DELETION

(a) We transfer the full campaign data to the client: every list, contact, call outcome, note and transcript, as a CSV file with the transcripts. The campaign folder stays with the client.
(b) Once the client has the data, we delete it from our dialling system, Slack and company devices, and remove our copies from Google Workspace, unless the law requires us to keep a record.
(c) We keep only the suppression list of numbers that asked not to be called, so those requests are always honoured.
(d) The client can ask us in writing to return or delete the data at any time.

15. IF SOMETHING GOES WRONG

If there is a personal data breach, we contain and investigate it, and tell the client in writing within 24 hours of becoming aware of it, with what happened, the data and people affected and the steps taken. We give the client everything needed to notify the Information Commissioner's Office (ICO) within 72 hours and, where required, the people affected. If a breach involves data we control, such as the prospect data we source or our suppression list, we notify the ICO ourselves.

16. ROLES AND CONTACT

Lead Approved is the controller of the prospect data it sources and enriches, and of its suppression list of numbers that asked not to be called. When it screens, calls and delivers campaign data on the client's behalf, the client is the controller of that campaign data and Lead Approved acts as its processor. Both rely on legitimate interests as the lawful basis for business to business calling, and section 17 gives the client the information it needs for its own assessment.

Questions about this process: Noah Green, Director, noah@leadapproved.com. Noah Green Ltd, trading as Lead Approved, company number 12553332.

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17. LEGITIMATE INTERESTS: INFORMATION FOR YOUR ASSESSMENT

The ICO's legitimate interests assessment has three parts: purpose, necessity and balancing. This section gives clients the information they need to document their own assessment for a campaign.

(a) Purpose. The interest is contacting businesses about a service relevant to them, to book a sales meeting. The benefit is commercial, for the client and for prospects who have a real need.

(b) Necessity. Calling is the channel agreed for the campaign, and we use only what a business call needs: name, job title, company details, business email address, phone number, LinkedIn profile URL, call notes, transcripts and outcomes. Companies come from the sources in section 2 and are checked against the agreed criteria. We contact only the decision makers named in the strategy, up to the number per company agreed.

(c) Balancing. People are contacted in their work role, about their business, in business hours. They can reasonably expect relevant business approaches, and any impact is limited to a short call. Every number is screened against TPS and CTPS before dialling and re-screened at least every 28 days. Anyone who asks not to be contacted again is marked Do Not Contact straight away and added to our suppression list. Data is kept only for the campaign, then transferred and deleted as set out in section 14.

Data subject requests that reach us are handled as set out in our agreement with the client. Questions on this section: noah@leadapproved.com.