



**SMB**Intelligence

# The Prime Growth Briefing for Corporate Social Responsibility

User Guide V18.1

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# About the Prime Growth Briefing

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*If you are not familiar with Prime Growth Classification please read this article first:*

<https://smbintelligence.com/prime-growth-classification/>

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The Prime Growth Briefing is a powerful bi-weekly dataset that identifies current prime growth small businesses.

The Briefing segments these firms based on their current growth priorities and provides deep insight into their current status through 60 innovative data points.

## **Methodology**

SMB Intelligence uses a proprietary method of machine analysis and human analytics to continually monitor tens of thousands of real estate, government, social, utility and editorial sources, to identify prime growth firms and provide unprecedented insight into their current status.

## **Volume of firms**

The number of prime growth firms / establishments identified monthly varies dependent on sector activity, but averages approximately 35,000 firms / establishments annually.

## **Delivery**

The Prime Growth Briefing is delivered in CSV format via email every two weeks.

# Data Points

<b>Social Impact</b>		
Opportunity Zone	Yes	This firm or establishment is located in an approved Opportunity Zone
Tract Type	LIC	This Opportunity Zone is a low income census tract
	Contiguous	This Opportunity Zone shares a common border with a low income tract whose median income doesn't exceed 125% of the qualifying tract
Investment Score	1-10	The level of past commercial, multi-family, single family and small business lending into the tract. A higher score indicates a higher level of investment.
Socioeconomic Flag	Yes	This tract has recently experienced high levels of socioeconomic change.
Minority-owned	Yes	This firm is minority-owned
Women-owned	Yes	This firm is women-owned
Low income area	Yes	This firm / establishment is located in a low income census tract
	No	This firm / establishment is not located in a low income census tract
	Undetermined	Data was not available
Tract minority %	Varied	The % of the population that is a minority in the census district the firm / establishment is located in
Minority tract	Yes	The firm / establishment is located in a census tract that is low income and with over 30% minority population
	No	The firm / establishment is not located in a census tract that is low income and with over 30% minority population
Tract median income	Varied	The median household income of the census tract the firm / establishment is located in
Metro median income	Varied	The median household income of the Metro Statistical Area the firm / establishment is located in
Area Economic Index	Varied %	The degree to which the community (census tract) that the firm / establishment is located in is economically advantaged or disadvantaged, in relation to the surrounding metro area. The lower the percentage, the less advantaged.
	Under 80%	This tract is economically distressed
	Over 120%	This tract is economically advantaged
Disaster area	Yes	The firm / establishment is located in a county designated as a FEMA disaster zone in the last three years.
Sustainability	Varied	Whether or not we can determine if they have a stated sustainability program

<b>Planned Growth</b>		
Development Stage	Seed	A new, pre-revenue, pre-opening firm, currently planning their launch
	Expansion	An existing firm, currently planning to expand
Growth Format	Add establishment	Currently planning to add an establishment
	Add second establishment	Currently planning to add a second establishment
	Add multiple establishments	Currently planning to add multiple establishments at once
	Funded	Recently closed a substantial outside funding round
	New firm	A new firm
	New firm - encore	A new firm, owned by an entrepreneur with previous experience
	Relocation	Currently planning to relocate this firm or establishment
Prime Growth Segment	Seed-NewFirm	These are new, seed stage firms, currently planning their launch
	Seed-Encore	These are new, seed stage firms, currently planning their launch, owned by an entrepreneur with previous experience
	Seed-Funded	These are new, seed stage firms, currently planning their launch, who have recently closed a substantial outside funding round
	Exp-Initial	These are existing single establishment firms, who are currently planning to expand into a small chain, by adding a second establishment
	Exp-Emerge	These are existing, emerging small chain firms with 3-10 establishments, that are currently planning to add another establishment.
	Exp-Advance	These are existing, advanced small chain firms, with 11-20 establishments, that are currently planning to add another establishment.
	Exp-Velocity	These are existing firms, that are currently planning rapid growth by adding multiple establishments at once.
	Exp-Funded	These are existing firms, who have recently raised closed a substantial outside funding round.
	Exp-Relocation	These are existing firms, currently planning to relocate the firm or an establishment.
Growth Priority	Varied	The big picture context of an owner's current growth plans - the format and scale of growth they are currently working to accomplish.
Growth Timing	Year / Quarter / Month	This is the expected timing of the firm's planned growth
Growth Scale	1 to 20	Total number of establishments the firm has, including current planned expansion establishments
Job Creation	Current	This firm is currently hiring for newly created jobs
	Near Future	This firm will be creating new jobs in the near future
	Undetermined	We can't determine the current job creation status of this firm

<b>Digital Engagement</b>		
Website	Varied	Whether or not the firm currently has a website
Linkedin	Varied	Whether or not the firm currently has a Linkedin profile
Facebook	Varied	Whether or not the firm currently has a Facebook profile
Twitter	Varied	Whether or not the firm currently has a Twitter profile
OpenTable	Yes	This firm has a listing on OpenTable
Digital Advertising	Varied	Whether or not this firm currently uses digital advertising, and which provider they use. Multi means more than one provider.
Ecommerce	Varied	Whether or not this firm currently has an ecommerce storefront, and which provider they use. Multi means more than one provider.
Yelp Rating	Varied	The current star rating of this firm
Yelp Claimed	Yes	This firm has claimed their Yelp listing
	No	This firm has not claimed their Yelp Listing
YP Claimed	Yes	This firm has claimed their YP listing
	No	This firm has not claimed their YP listing

<b>Political Districts</b>		
Congress	Varied	The congressional district the firm / establishment is located in
Senate	Varied	The senate district the firm / establishment is located in
House	Varied	The house district the firm / establishment is located in

<b>Firmographics</b>		
Firm name	Varied	The name of the firm or establishment
Firm Format	Independent	A single establishment firm
	Small Chain	A small chain firm with less than 20 establishments
Employer Status	Current	This firm is currently an employer
	Near Future	This firm will be an employer in the near future (these are seed stage firms who will be launching in the near future)
Date Added	Varied	The date this firm / establishment profile was added
Industry	Varied	The industry classification of the firm
Category	Varied	The category classification of the firm
City	Varied	The city the firm / establishment is located in
State	Varied	The state the firm / establishment is located in
County	Varied	The county the firm / establishment is located in
Zip	Varied	The zip code the firm / establishment is located in
Country	USA	This firm / establishment is located in the US
	Canada	This firm / establishment is located in Canada
Metro	Varied	The Metro Statistical code the firm / establishment is located in
Co Age	Varied	The age of the firm
QSR	Varied	For foodservice firms / establishments - whether the firm is a quick serve restaurant

<b>Spatial</b>		
Latitude	Varied	The latitude of the firm / establishment
Longitude	Varied	The longitude of the firm / establishment
Accuracy Type	Rooftop	Exact building
	Range interpolation	Within a block
	Street Center	Street centroid accurate within a few blocks

<b>Contact</b>		
Address	Varied	The street address of the firm / establishment
Mail status	Valid-Mailable	We were able to USPS validate this address is currently deliverable
	Valid-Vacant	We were able to USPS validate this address is currently deliverable, however USPS has marked it as vacant
	Valid-Inactive	We were able to USPS validate this address is currently deliverable, however USPS has marked it as inactive
	Not Mailable	We were not able to USPS validate this address (usually because it is not a complete address)
Email	Varied	Whether or not we have an email for this firm
Email status	Valid	This email is valid and deliverable
	Accepts All	This email came back as valid, but the server has been configured to respond positive to all validation requests
	Unknown	We can't validate this email one way or the other
Phone	Varied	Whether or not we have a phone number for this firm
Phone status	Valid-Fixed	This is a validated landline
	Valid-Mobile	This is a validated mobile line
	Valid-Digital	This is a validated VOIP line
	Valid-Toll Free	This is a validated toll free line
Context	Varied	This is a description of the firm / establishment
Call Context	Varied	Additional context for the phone number provided
First	Varied	Whether or not we have the first name of the owner
Last	Varied	Whether or not we have the last name of the owner
Title	Varied	Whether or not we have the specific title of the owner

# Planned growth insight

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## **Development stage**

Firms are defined to be at seed stage when they are a new, pre-revenue, pre-opening firm, currently planning their launch.

Firms are defined to be at expansion stage when they are an existing, operating firm that is currently planning to add an establishment, to relocate their firm or an establishment, or have just closed a substantial outside funding round.

## **Growth format**

Determines the manner in which the firm is planning substantial growth: launching a new firm, adding establishments, a relocation or a recent closed funding round.

## **Growth scale**

The total number of establishments a firm has. This is useful to differentiate between a single establishment firm and small emerging or advanced chains.

## **Growth timing**

Defines when the planned growth is scheduled to occur. As growth is very rarely planned to specific dates, we use a unique format: year / quarter / month / date, to enable sorting by quarter and month.

## **Job creation**

Job creation status is either current, near future, or undetermined.

Current means they are currently hiring for newly created jobs. Near future means they will be creating new jobs in the near future. Undetermined means we were unable to determine their current job creation status.

We use a proprietary method to determine current job creation status. Accuracy is 96%.

## **Growth priority**

Defines the big picture context of an owner's current growth plans - the format and scale of growth they are currently working to accomplish.



# Prime growth segments

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## **Seed – New Firm**

New, seed stage, pre-revenue, pre-opening firms currently planning to launch their firm.

## **Seed – Encore**

New, seed stage, pre-revenue, pre-opening firms currently planning to launch their firm, with an owner who has previous entrepreneurial experience.

## **Seed – Funded**

New, seed stage, pre-revenue, pre-opening firms currently planning to allocate recently raised funds to launch their firm.

## **Expansion – Initial**

Existing, expansion stage firms, currently planning to expand their single establishment firm into a small chain by adding a second establishment.

## **Expansion – Emerge**

Existing, expansion stage, emerging small chain firms with 3-10 establishments, that are currently planning to expand by adding an establishment.

## **Expansion – Advance**

Existing, expansion stage, advanced small chain firms with 11-20 establishments, that are currently planning to expand by adding an establishment.

## **Expansion – Velocity**

Existing, expansion stage firms, that are currently planning rapid expansion by adding multiple new establishments at once.

## **Expansion – Funded**

Existing, expansion stage firms, that are currently planning to allocate recently raised funds for substantial growth.

## **Expansion – Relocate**

Existing, expansion stage firms, that are currently planning to expand by relocating their firm or an establishment to a new location.

# Social impact insight

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## **Low income tract**

We define a firm or establishment as being located in a low income census tract when the tract median income is less than 80% of the metro area median income, based on 5 Year ACS data 2011-2015.

## **Tract median income**

The median income of the census tract the firm or establishment is located in, based on 5 Year ACS data 2011-2015.

## **Metro median income**

The median income of the metro statistical area the firm or establishment is located in, based on 5 Year ACS data 2011-2015.

## **Area minority percentage**

The percentage of the population in the tract that is a minority, based on 5 Year ACS data 2011-2015.

## **Minority tract**

The census tract is classified as low income and the tract minority percentage is 30% or above.

## **Minority-owned**

A firm that is at least 51% owned by an individual of African, Hispanic, Native American, Asian Pacific and Subcontinent Asian backgrounds.

We use a proprietary method to determine minority-owned firms. Firms that are classified as minority-owned have a 90% accuracy rate.

## **Women-owned**

A firm that is at least 51% owned by a woman.

We use a proprietary method to determine women-owned firms. Firms that are classified as women-owned have a 97% accuracy rate.

## **Opportunity Zone**

The firm or establishment is located in a census tract designated as an approved Opportunity Zone.

## **Disaster area**

The firm or establishment is located in a county eligible for individual FEMA assistance within the previous three years.

*\*2011-2015 is the latest 5 Year ACS dataset available.*

# Area Economic Index

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The Area Economic Index was developed by SMB Intelligence to help measure the degree of economic distress (or advantage) of the community the prime growth firm is located in, in relation to its surrounding area.

The index uses a simple formula: the median income of the census tract the firm or establishment is located in, divided by the median income of the surrounding metro statistical area, based on 5 Year ACS data 2011-2015.

This provides us with a percentage, with 100% representing a census tract whose median income matches the median income of the surrounding area - it is not likely to be economically distressed or advantaged.

The lower the percentage, the more economically distressed the community is likely to be in relation to its surrounding area. The higher the percentage, the more prosperous the community is likely to be in relation to its surrounding area. We define under 80% as being economically distressed, and over 120% as being economically advantaged.

The index exists to help promote inclusive economic growth by identifying prime growth firms in economically distressed communities, and which firms, if successful, could have an outsized positive impact on their community.

For example, a new grocery store opening in a prosperous, economically advantaged community will most likely not have an overly large impact on that community, as it is already prosperous.

However, that same grocery store opening in an economically distressed community could substantially increase the number of jobs available, provide badly needed amenities, and potentially serve as a catalyst for further development in the area.

The Area Economic Index can help your organization determine where your support could potentially have the highest impact.