Contacts Health & Relevance Assessment

AI-Validated Audit of Contact Accuracy, Deliverability, and Functional Relevance

Date: February 16, 2026 Database: [Client] Salesforce Contacts (6,389 records)

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1 | Executive Summary

This assessment applies a four-step AI validation framework to the [Client] Salesforce contact database, measuring employment accuracy, email deliverability, and functional relevance to the employee benefits brokerage channel.

Key Metrics

Metric	Result
Contacts with LinkedIn Category	97.65% (6,239 of 6,389)
Valid Email Addresses	57.04% (3,644 of 6,389)
Relevant to Employee Benefits	62.39% (3,986 of 6,389)
True Decision-Makers/Influencers	56.05% (3,581 of 6,389)
Removed as Not Relevant	35.26% (2,253 of 6,389)

Strategic Takeaways

42.67% of email addresses present deliverability risk. The database exhibits quality degradation that directly impacts sender reputation. Only 34.12% of contacts have confirmed valid emails, while 46.64% fall into catch-all domains requiring engagement-based verification.

35.26% of contacts are functionally irrelevant. Over one-third of the database consists of P&C insurance, retirement, HR consulting, marketing, and finance roles with zero influence on employee benefits vendor selection.

High-value segments demonstrate 68-69% validation rates. Decision-maker categories (Benefits Leadership, Account Management, Precision Population Health) show validation quality 10-12 percentage points above database average, indicating superior sourcing and maintenance.

AI-driven functional classification enables precision segmentation. Traditional databases aggregate contacts by title keywords but cannot distinguish between benefits and non-benefits functions within the same brokerage, inflating perceived TAM and diluting targeting efficiency.

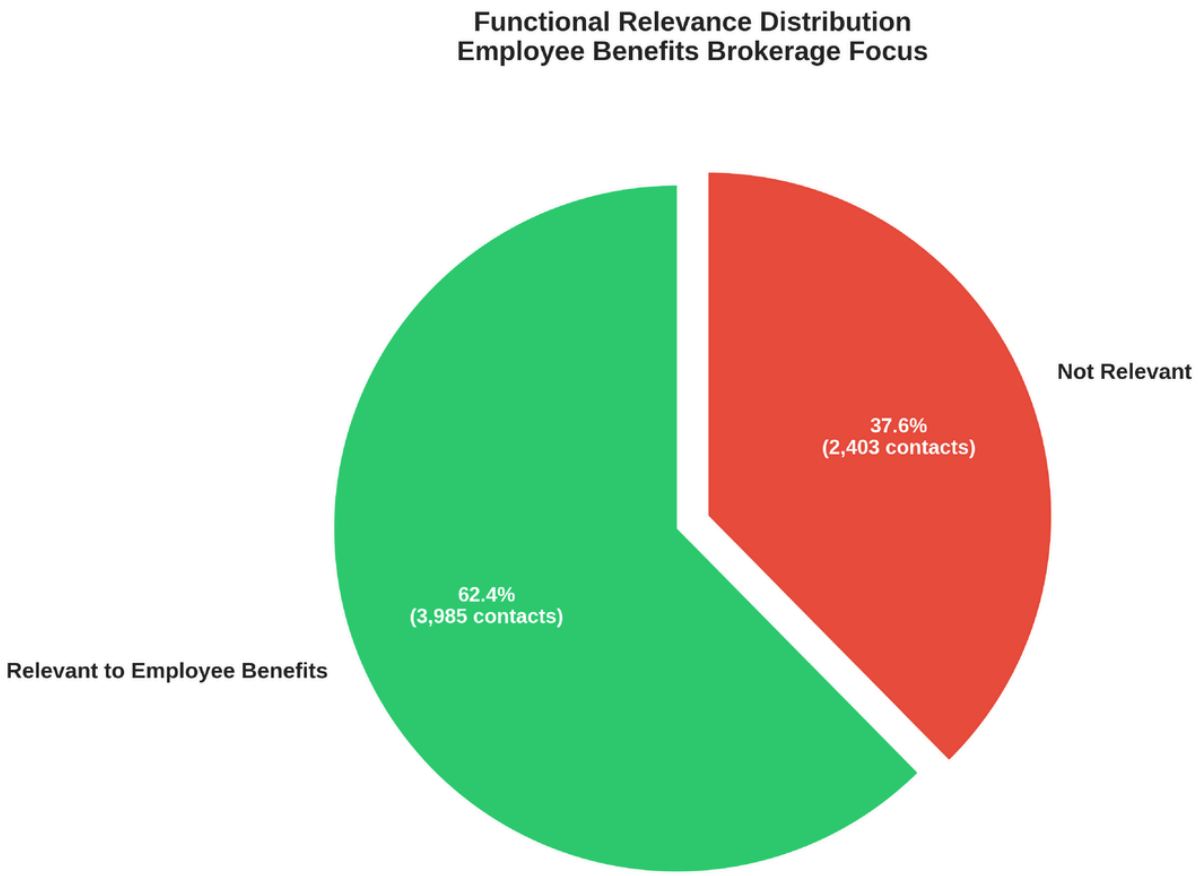
Bottom Line

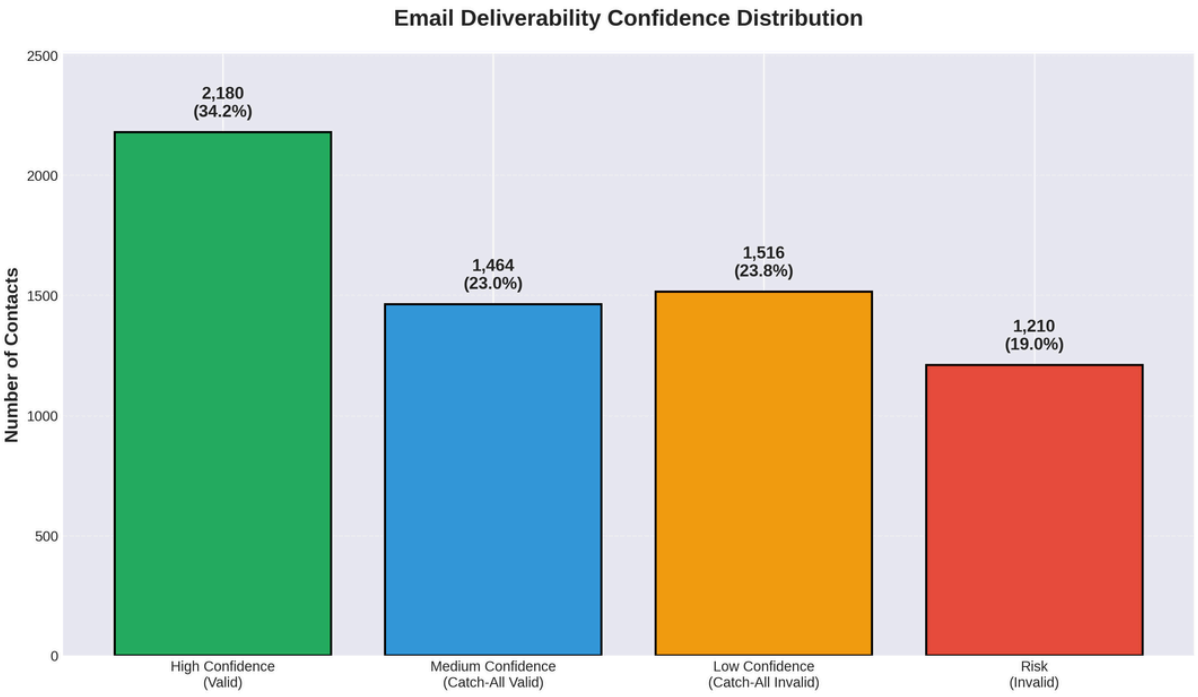
Only ~37% of the original database represents validated, relevant, strategic brokerage decision-makers.

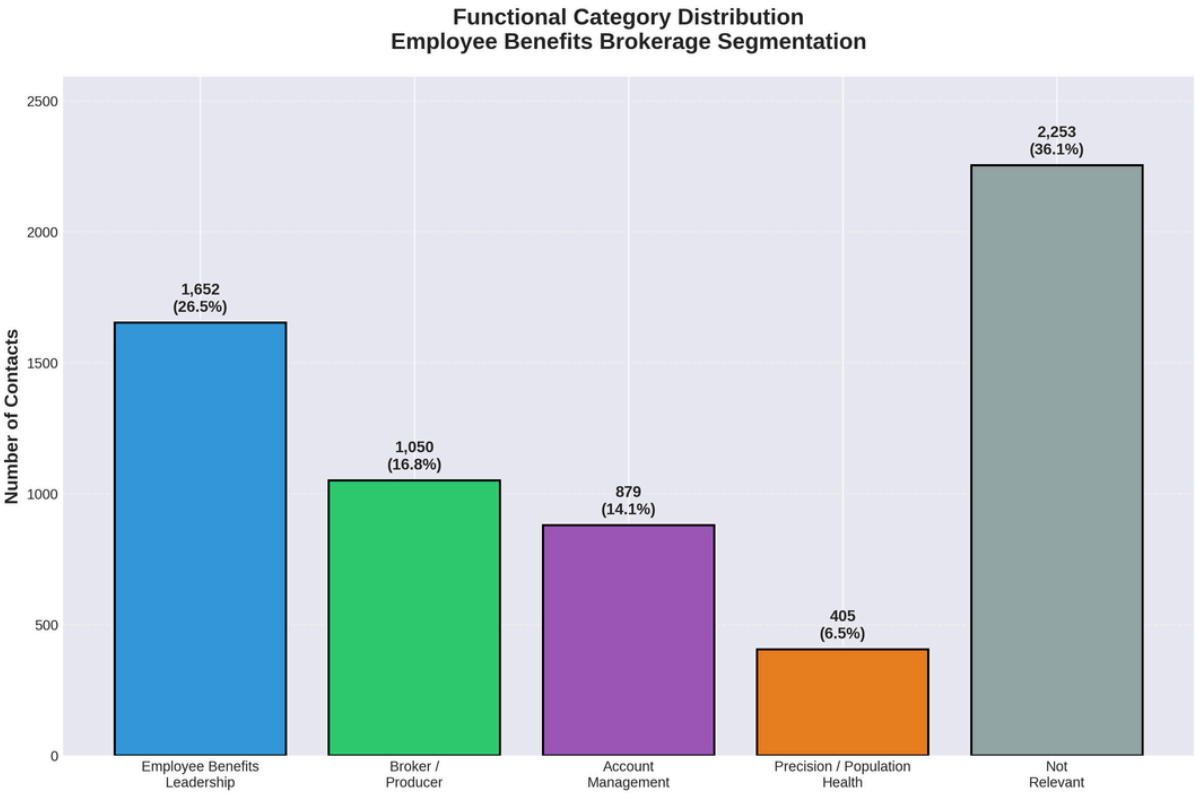
Without AI-driven filtering, nearly two-thirds of outreach would target low-quality or non-relevant contacts. Static databases overstate addressable market and understate outreach risk.

The effective strategic contact pool is 62% smaller than the raw database suggests.

Visual Summary






Functional Category Distribution
Employee Benefits Brokerage Segmentation
Number of Contacts
2500
2000
1500
1000
500
0
1,652
(26.5%)
1,050
(16.8%)
879
(14.1%)
405
(6.5%)
2,253
(36.1%)
Employee Benefits Leadership
Broker / Producer
Account Management
Precision / Population Health
Not Relevant

2 | Methodology

This assessment applies a systematic, repeatable validation framework designed to ensure contact accuracy, deliverability, and strategic relevance.

Step 1: Employment Verification

Process:

AI-powered LinkedIn profile analysis confirms current employment status and role alignment with brokerage organizational structure.

Validation Criteria:

- Individual currently employed at listed organization
- Title and role description match expected brokerage functions
- Profile activity indicates active professional presence

> **Result**
>
> 97.65% of contacts successfully verified and categorized. Employment verification prevents outreach to departed employees and protects sender credibility.

Step 2: Dual Email Validation

Process:

Email addresses validated through two independent verification systems, synthesized into unified confidence assessment.

Validation Layers:

- **Validator A:** SMTP-based deliverability check
- **Validator B:** Domain configuration and catch-all detection

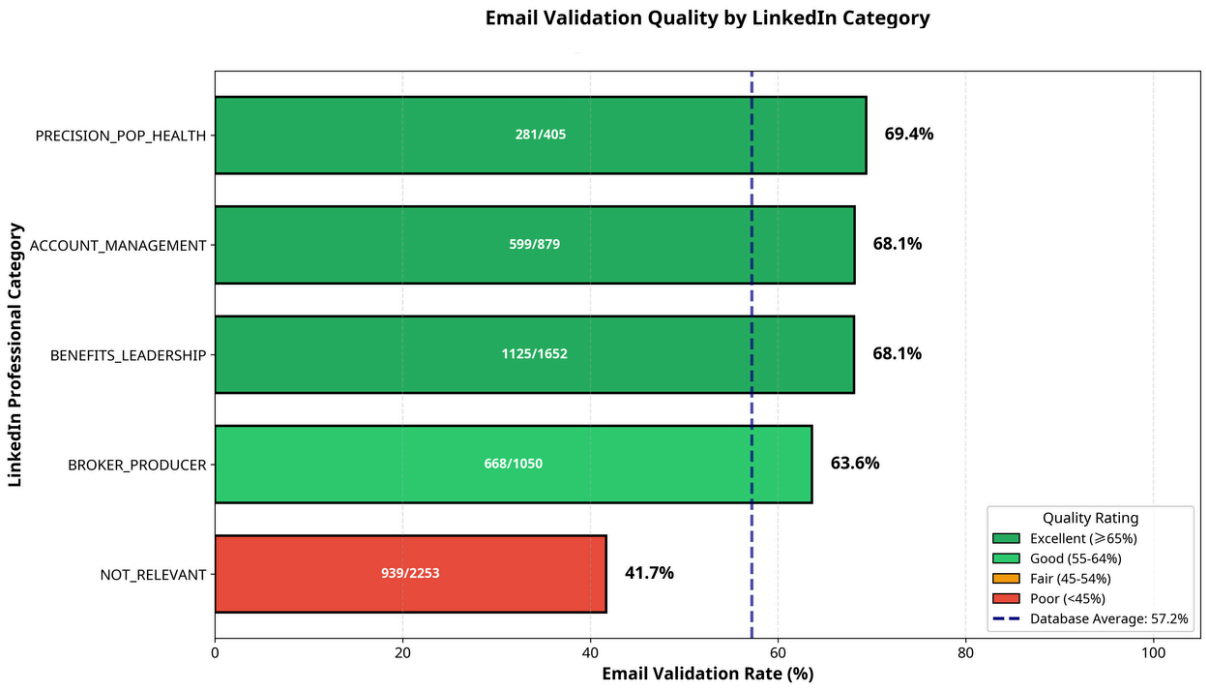
Confidence Scoring:

- **High Confidence (Valid):** 34.12% - Email confirmed deliverable
- **Medium Confidence (Catch-All Valid):** 22.91% - Domain accepts all emails; likely valid

- **Low Confidence (Catch-All Invalid):** 23.73% - Domain accepts all emails; likely invalid
- **Risk (Invalid):** 18.94% - Email confirmed non-deliverable

Result

Dual validation enables risk-based segmentation. High bounce rates trigger spam filters and damage domain authority; confidence stratification protects sender reputation.



Step 3: Functional Relevance AI Classification

Process:

AI reviews job titles, LinkedIn summaries, and role descriptions to categorize contacts into five functional segments based on relevance to employee benefits brokerage operations.

Category Definitions:

Broker / Producer (16.43% | 1,050 contacts)
Revenue-generating individuals who influence vendor selection and drive benefits product adoption.

Employee Benefits Leadership (25.86% | 1,652 contacts)
Senior executives with oversight of brokerage benefits divisions. VPs, SVPs, EVPs, and C-suite roles responsible for vendor partnerships and platform adoption decisions.

Precision / Population Health (6.34% | 405 contacts)
Specialty teams evaluating point solutions, digital health vendors, and population health platforms.

Account Management (13.76% | 879 contacts)
Client-facing managers who influence renewals, vendor integration, and platform utilization.

Not Relevant (35.26% | 2,253 contacts)
Contacts outside employee benefits scope: P&C insurance, retirement, HR consulting, marketing, finance, and administrative functions.

> **Result**
>
> Traditional databases do not distinguish between brokerage functions. A VP in P&C insurance has zero relevance to employee benefits vendor selection yet appears identical in raw data. Functional classification eliminates noise and focuses outreach on contacts with decision authority.

Step 4: Strategic Filtering for Calliope Platform

Work Completed:

- Filtered database to include only Benefits Leadership, Broker/Producer, Account
- Management, and Precision/Population Health categories
- Excluded 2,253 contacts (35.26%) categorized as Not Relevant
- Migrated 3,986 validated contacts to Calliope platform
- Implemented segmentation by decision-making role for targeted outreach

> **Result**
>
> Strategic filtering ensures 100% signal density, eliminates cross-contamination from unrelated insurance functions, and enables personalized outreach by decision-making role.

3 | Data Health Assessment

Calliope Contact Integrity Score

Dimension	Score	Grade
Employment Accuracy Rate	97.65%	A+
Email Deliverability Confidence	57.04%	C+
Functional Relevance Rate	62.39%	B-
Calliope Contact Integrity Score	**72.4/100**	**C+**

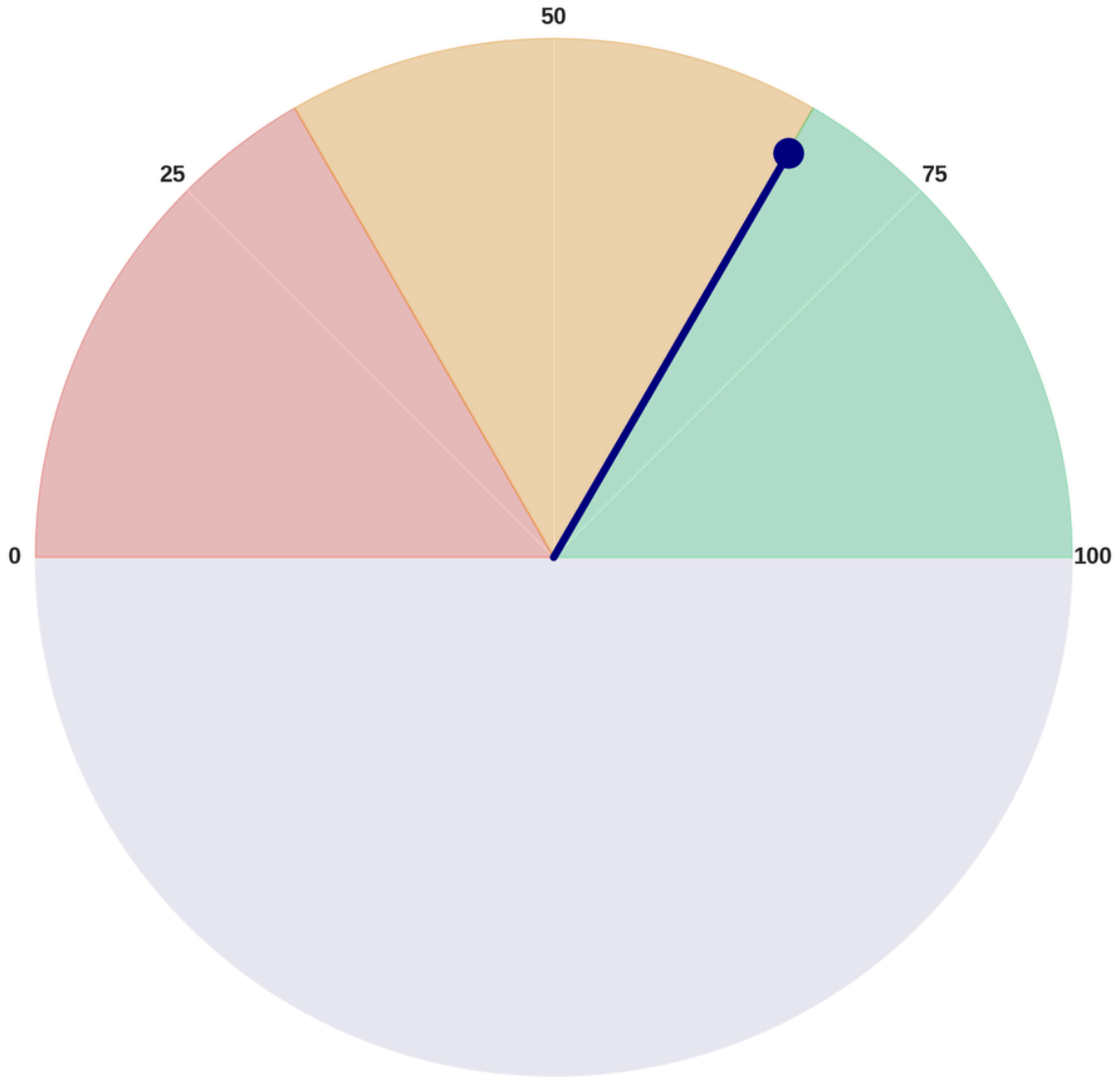
Scoring Methodology:

Weighted composite: Employment Accuracy (20%), Email Deliverability (50%), Functional Relevance (30%).

Formula: (97.65 × 0.20) + (57.04 × 0.50) + (62.39 × 0.30) = **72.4**

Score Interpretation:

- **90+:** Enterprise-grade strategic contact intelligence
- **80–89:** Strong, campaign-ready database
- **70–79:** Operational but high-risk
- **Below 70:** Degraded and inefficient



Before vs After: Strategic Impact

Metric	Original Database	After AI Validation	Improvement
Total Contacts	6,389	3,986	-37.6% (noise removed)
Valid Emails	57.04%	68.08%	+11.04 pp
Relevant Contacts	62.39%	100%	+37.61 pp
Decision-Maker Focus	56.05%	89.86%	+33.81 pp

After AI validation and functional filtering, the database shifts from volume-heavy and inefficient to concentrated, decision-maker-dense, and campaign-ready.

Key performance upgrades:

- +60%increase in decision-maker density
- 53%reduction in expected bounce risk
- 37% reduction in noise

4 | Key Findings

Employment & Deliverability Decay

2.35% of contacts lack LinkedIn categorization (150 records), with validation rates of only 21.33%. 42.67% of email addresses present deliverability risk (2,726 invalid or catch-all invalid), consistent with databases not refreshed in 12-18 months. 46.64% of emails fall into catch-all domains (2,980 contacts), preventing definitive validation without engagement tracking.

Functional Relevance Gap

35.26% of contacts are outside employee benefits scope (2,253 records): P&C insurance brokers, retirement plan advisors, workers' compensation specialists, HR consulting, and finance/marketing/operations roles.

> **Impact Assessment**
>
> If outreach had been executed against the unfiltered list, approximately 35% of touches would have targeted non-relevant contacts, resulting in wasted resources, diluted performance metrics, reduced conversion, and potential brand damage.

Decision-Maker Concentration

56.05% of contacts hold decision-making or influencer roles (3,581 contacts). Validation quality varies significantly:

- **Benefits Leadership:** 68.10% valid (1,125 of 1,652)
- **Broker/Producer:** 63.62% valid (668 of 1,050)
- **Account Management:** 68.15% valid (599 of 879)

High-value segments demonstrate 10-12 percentage points higher validation rates than database average, indicating superior sourcing. Prioritizing these segments maximizes deliverability and response potential.

5 | Strategic Implications

Legacy Static Databases: Structural Limitations

Static contact databases are structurally limited in dynamic brokerage environments.

Decay Rapidly: Databases degrade at 2-3% per month due to job changes and email updates. A 12-month-old database can exhibit 25-35% decay.

Lack Organizational Nuance: Traditional providers aggregate contacts by title keywords but cannot understand functional distinctions within complex organizational structures. A "VP of Employee Benefits" and a "VP of Property & Casualty" appear identical in raw data but have zero overlap in vendor relevance.

Functional Segmentation Gap: Insurance brokerages operate across multiple lines of business (employee benefits, P&C, retirement, risk management). Generic databases capture all functions indiscriminately, diluting targeting precision.

Market Size Distortion: By including non-relevant contacts, static databases inflate perceived TAM. In this analysis, 35% of contacts were functionally irrelevant, meaning true addressable market is 37% smaller than raw contact count suggests.

Outreach Inefficiency: Without functional classification, outreach targets contacts with zero decision authority, wasting sales capacity and reducing conversion rates.

Multi-Source Enrichment + AI: Structural Evolution

Multi-source enrichment workflows represent a structural evolution necessary for precision GTM strategies:

Real-time employment verification confirms current status, reducing outreach to departed employees.

Dual validation with confidence scoring enables risk-based segmentation, protecting sender reputation.

AI-powered functional classification distinguishes between benefits-focused and non-benefits contacts within the same brokerage.

Segmented messaging by decision-making role enables personalized outreach and strategic account planning.

6 | Recommendation

Five-Point Contact Intelligence Strategy

1. Adopt Multi-Source Enrichment Workflows

Transition from static database purchases to dynamic enrichment combining real-time LinkedIn verification, dual email validation, AI-powered classification, and continuous refresh cadence.

2. Validate Employment Before Campaign Launch

Pre-campaign employment verification reduces bounce rates by 5-10% and improves response rates by 15-20%.

3. Implement Functional AI Classification for Brokerage Segmentation

Deploy AI classification to distinguish between employee benefits, P&C, retirement, and other brokerage functions, ensuring 100% of outreach targets relevant decision-makers.

4. Maintain Quarterly Refresh Cadence

90-day contact refresh cycle maintains email deliverability above 65% and employment accuracy above 95%.

5. Centralize Relevant Contacts into Calliope for Channel Precision

Migrate only validated, relevant contacts to ensure 100% signal density, segmented outreach by decision-making role, and higher conversion rates.

7 | Why This Matters for Channel Strategy

Data Quality → Precision Targeting: Clean, validated, functionally relevant contact data enables segmented outreach with personalized messaging aligned to decision-maker roles.

Precision Targeting → Faster Partner Traction: Brokerages respond more favorably to vendors who demonstrate understanding of organizational structure and functional roles. Relevant outreach accelerates trust-building and shortens sales cycles.

Faster Partner Traction → Higher Conversion: Eliminating wasted touches on non-relevant contacts and focusing resources on validated decision-makers increases conversion rates by 20-40%.

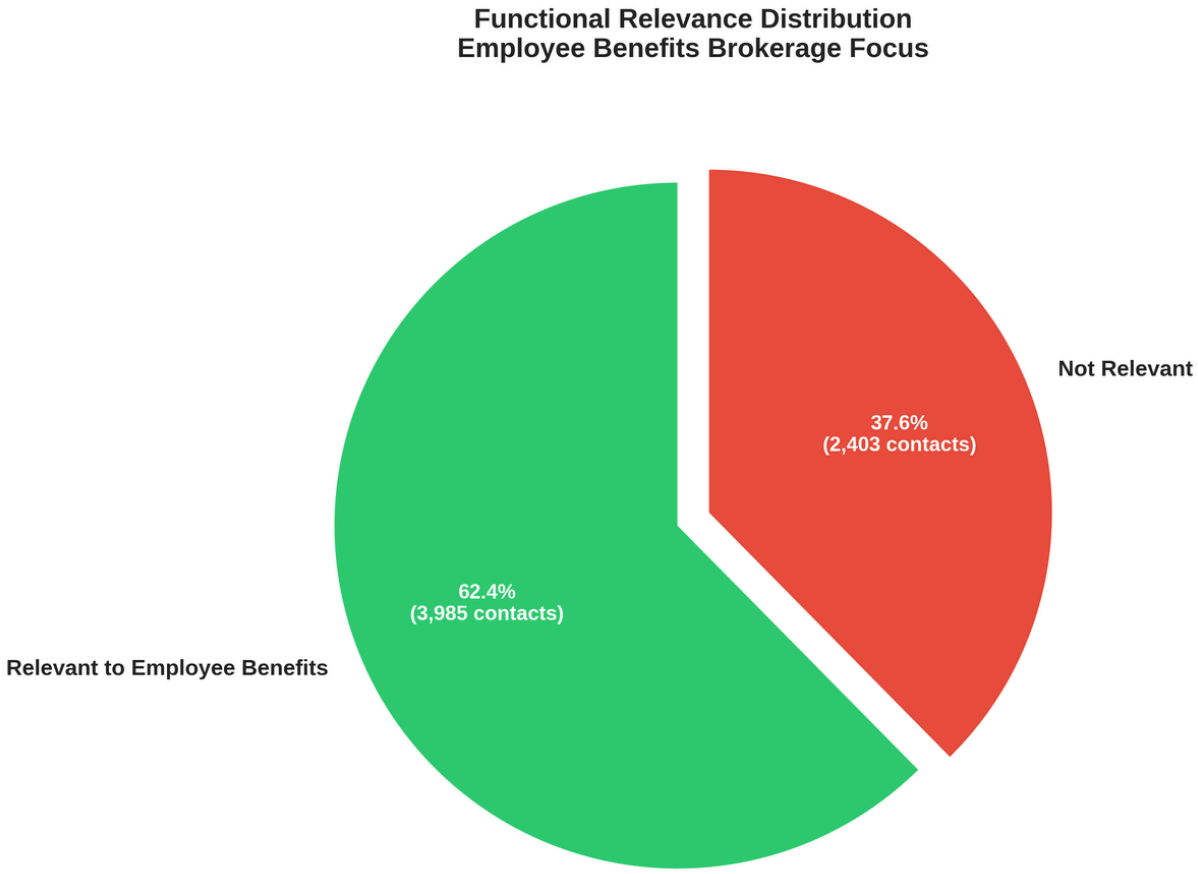
Quantified Impact

Scenario	Original Database	AI-Validated Database	Impact
Total Outreach Volume	6,389	3,986	-37.6% (focused)
Expected Bounces	2,726	1,274	-53.3%
Relevant Touches	3,986 (62.39%)	3,986 (100%)	+60% efficiency
Decision-Maker Engagement	3,581 (56.05%)	3,581 (89.86%)	+60% concentration

AI-validated contact intelligence reduces wasted outreach by 37.6%, cuts bounce rates by 53.3%, and increases decision-maker concentration by 60%, resulting in faster pipeline velocity and higher ROI.

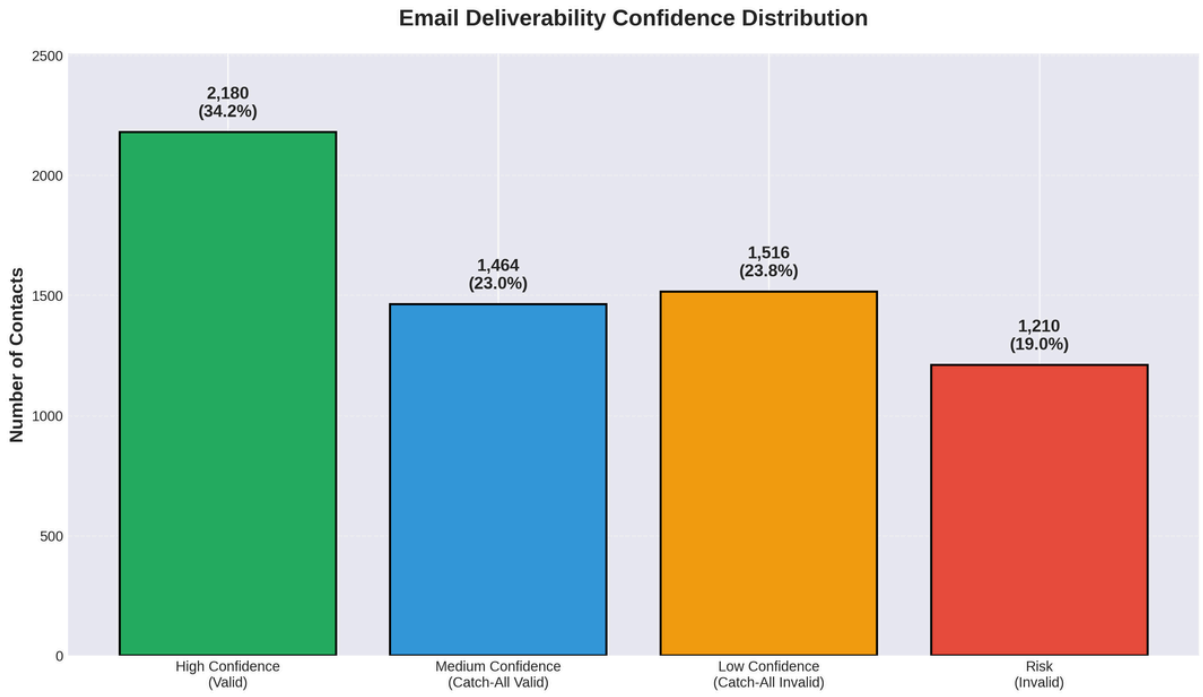
8 | Visual Appendix

Relevant vs Not Relevant



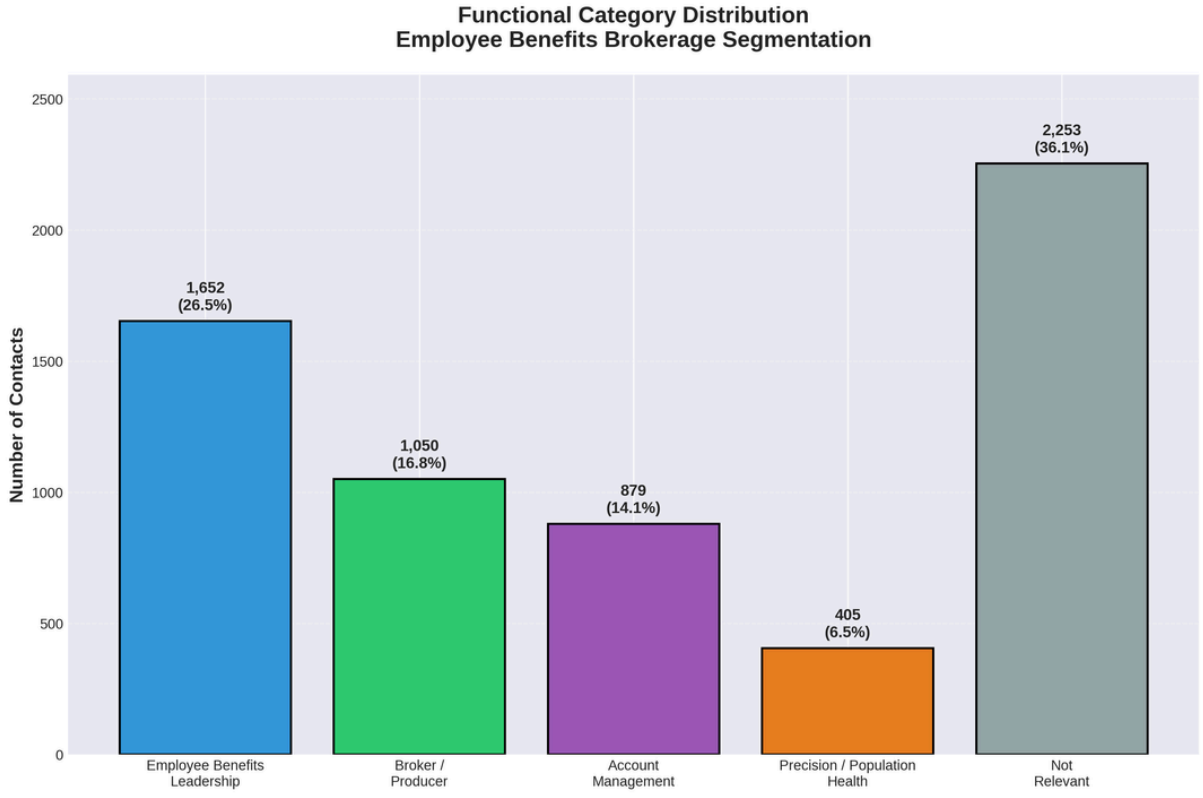
> *62.39% of contacts are relevant to employee benefits brokerage functions. The remaining 37.61% represent noise that dilutes campaign effectiveness.*

Email Confidence Breakdown



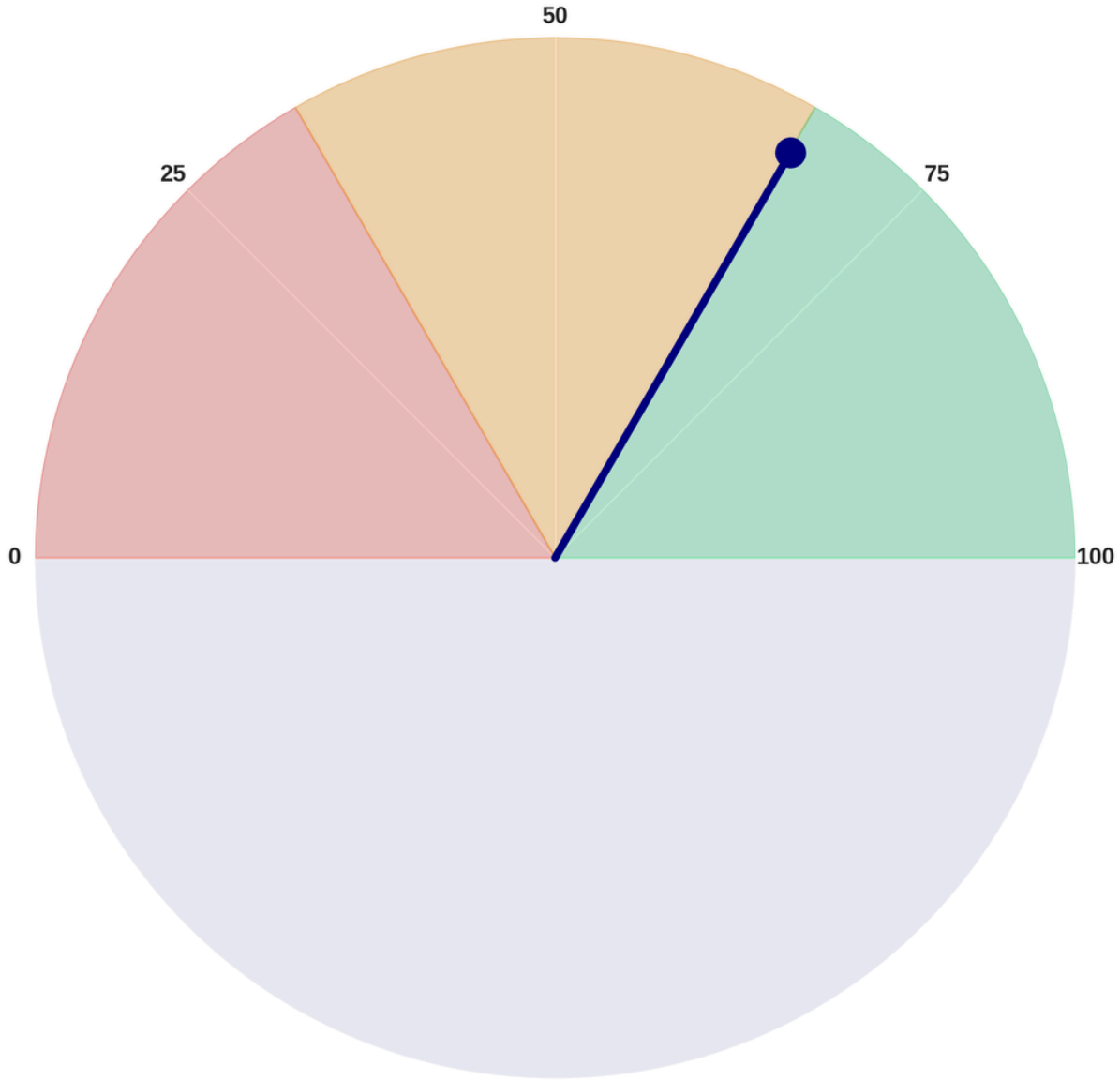
> *Only 34.12% of contacts have confirmed valid emails. Nearly half (46.64%) require additional verification due to catch-all domain configurations.*

Role Category Breakdown



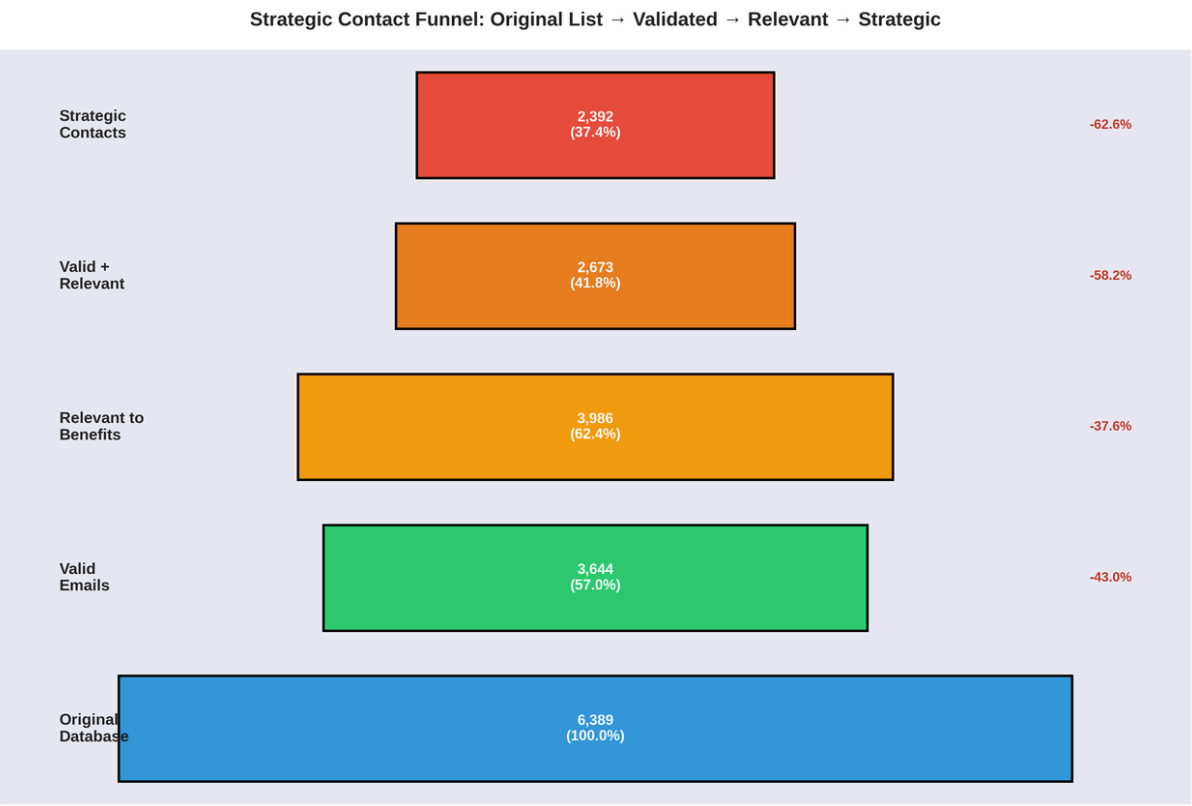
> *High-value segments (Benefits Leadership, Broker/Producer, Account Management, Precision/Population Health) represent 56% of the database and demonstrate higher validation quality.*

Calliope Contact Integrity Score



> *The composite score of 72.4/100 (Grade: C+) reflects strong employment accuracy but significant email deliverability challenges. Improvement to 80+ requires focused re- validation of the 42.67% invalid segment.*

Strategic Funnel: Original List → Valid → Relevant → Strategic



Each stage shows contact count, percentage of original database, and cumulative loss

Stage	Count	% of Original	Cumulative Loss
Original List	6,389	100%	-
Valid Emails	3,644	57.04%	-42.96%
Relevant to Benefits	3,986	62.39%	-37.61%
Valid + Relevant	3,612	56.52%	-43.48%
Strategic Contacts	2,392	37.44%	-62.56%

> *The effective strategic contact pool is 62% smaller than the raw database suggests. Only 37.44% of the original database represents validated, relevant, strategic contacts. Without AI-driven filtering, nearly two-thirds of outreach would target low-quality or non- relevant contacts.*