

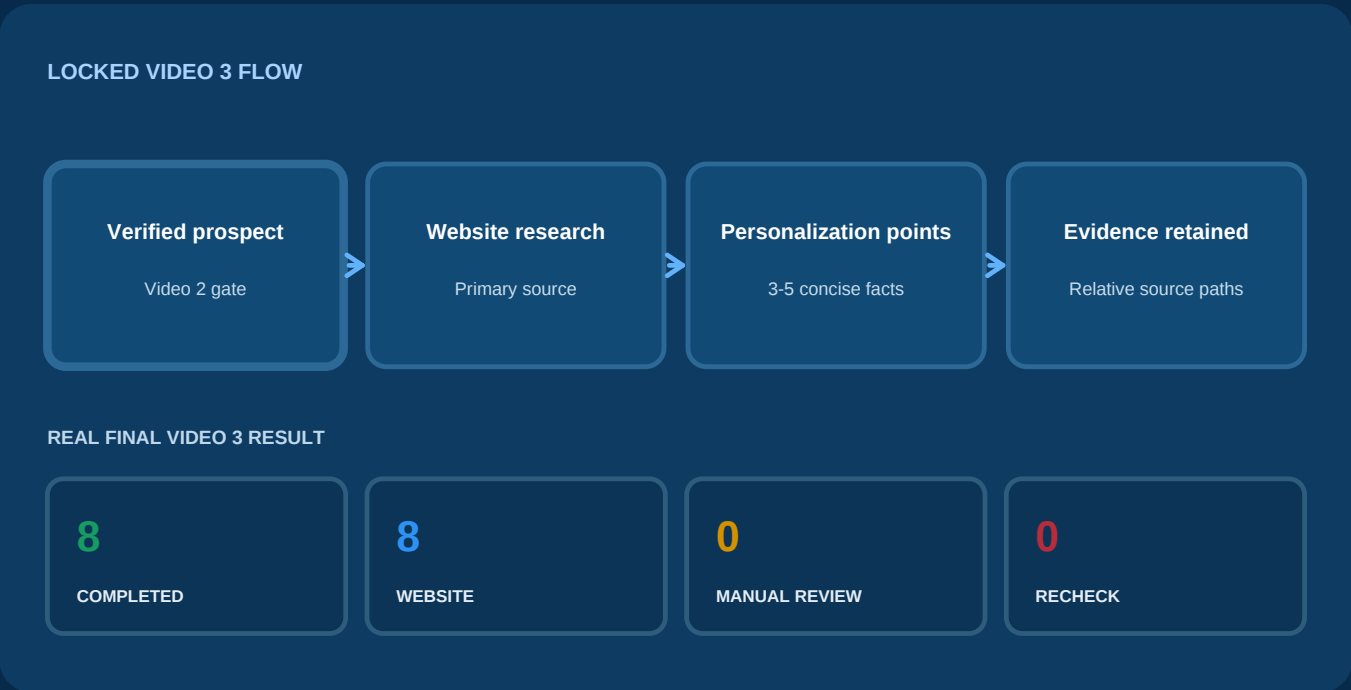
CFM - CONTACT FORM MARKETING

# CFM in Action

## Researching Individual Prospects

Public process overview and companion guide to Video 3

A practical look at how ZAR Advertising turns verified, contactable prospects into concise, evidence-backed personalization research before campaign-message preparation begins.



Workflow details and final counts come from the locked real Video 3 run; prospect identifiers are not exposed.

## OVERVIEW

# What Video 3 adds to the CFM workflow

Video 3 takes prospects that have already passed the contact-form stage and creates concise, truthful personalization research for the next message-preparation stage.

## CORE OPERATING PRINCIPLE

**Research first. Personalize from evidence. Never invent.**

**Verified input**

The normal queue starts with completed Video 2 records that have a confirmed usable contact form. Research does not repeat campaign relevance or contact-form verification.

**Focused research**

The prospect website is the primary source. Only a small number of useful pages are reviewed, and only facts that can support outreach personalization are retained.

**Evidence-first output**

The tool stores concise Personalization Research together with source paths, research source, status, reason and pages reviewed so the next stage has both usable facts and provenance.

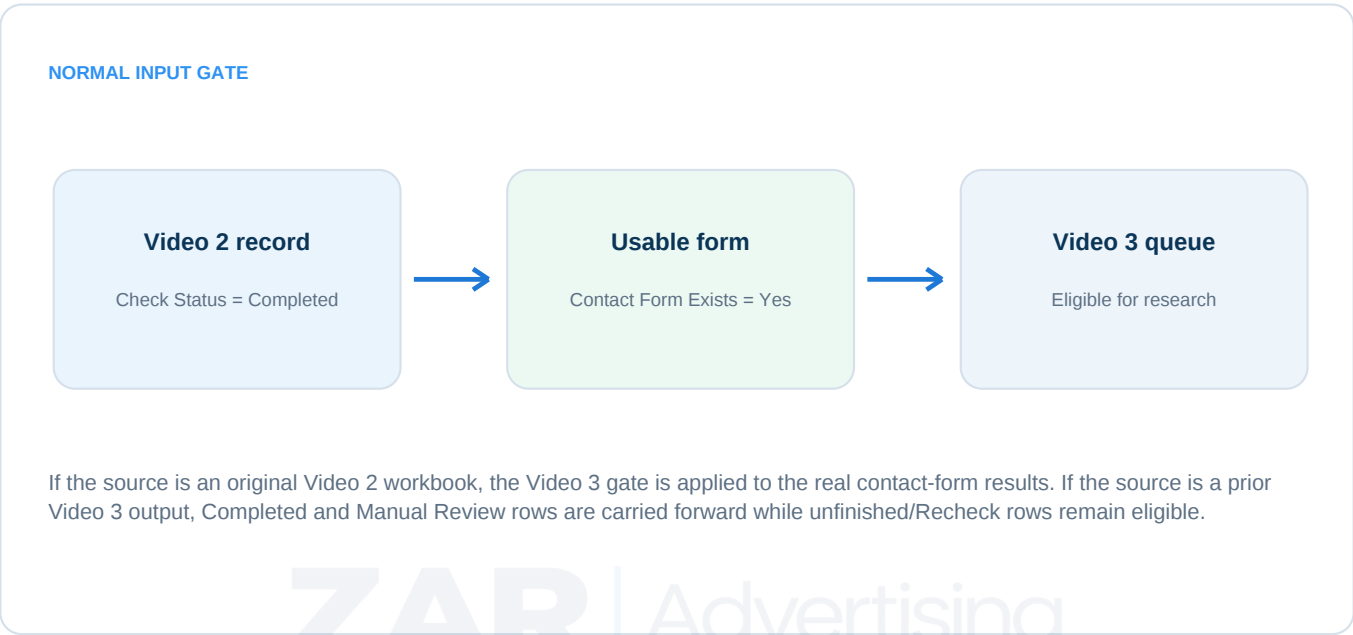
**VIDEO 3 BOUNDARY**

Video 3 does not write the campaign message and does not submit a contact form. It ends with structured research ready for Video 4 - Preparing Personalized Campaign Messages.

STEP 1

# Start with verified contactable prospects

Prospect research begins after the contact-form workflow has already established which records are ready to move deeper into campaign preparation.



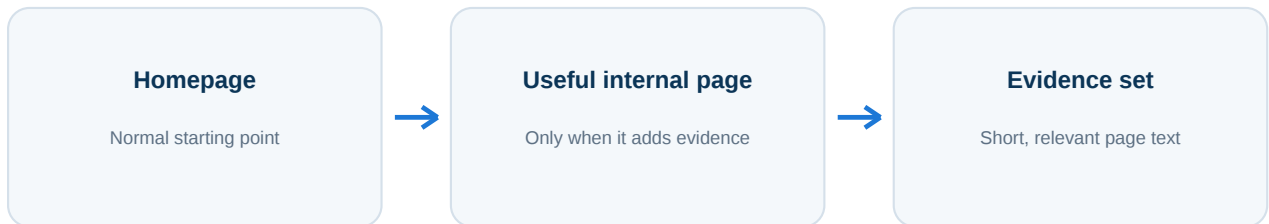
|                                                                           |                                                                                                                     |                                                                                                                         |
|---------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------|
| <b>INPUT</b><br><br>Original Domain plus preserved Video 2/source fields. | <b>PRESERVE</b><br><br>Confirmed-form prospects remain in the campaign pipeline even when website research is weak. | <b>DO NOT REPEAT</b><br><br>Campaign relevance and contact-form verification belong to the earlier stages, not Video 3. |
|---------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------|

## STEP 2

## Research the prospect's own website

The prospect website is the primary research source. The tool collects a compact evidence set rather than turning this stage into broad, open-ended company research.

### FOCUSED WEBSITE EVIDENCE



There is no hard-coded requirement that every website have an About page. A small number of useful internal pages may be reviewed when they add meaningful, message-usable evidence.

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### PRIMARY SOURCE

Website research remains the primary demonstrated method in the public workflow.

### CONTROLLED SCOPE

Research focuses on facts useful for personalization - not unlimited enrichment, technology discovery or open-ended company profiling.

## STEP 3

# Turn evidence into concise personalization points

AI acts as the semantic research engine, but it must use only the supplied evidence and return short, specific facts that can support professional outreach.

**3-5****NORMAL POINTS**

Do not force a fixed number when evidence is weak.

**50-80****TARGET WORDS**

Approximate total research length for normal records.

**~100****MAX WORDS**

A practical ceiling unless a future real campaign requires more.

## PERSONALIZATION RULES

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**Specific**

Prefer concrete, business-relevant facts.

**Factual**

Use only evidence supplied to the model.

**Message-usable**

Retain facts that can support a personalized opening.

**No filler**

Avoid generic marketing language and source-attribution filler.

**NEVER INVENT INFORMATION**

When reliable evidence is insufficient, preserve the record for another method or human review. The tool must not manufacture personalization merely to fill the output.

STEP 4

# Keep source evidence separate and auditable

Video 3 stores the useful research together with its source information. This prevents the workflow from becoming an unsupported AI paragraph with no provenance.

VALIDATED VIDEO 3 OUTPUT LAYOUT

|   |                          |                                                              |
|---|--------------------------|--------------------------------------------------------------|
| 1 | Original Domain          | Stable prospect key (masked publicly)                        |
| 2 | Company / Brand Name     | Populated only when reliable website evidence establishes it |
| 3 | Personalization Research | Concise structured research for later message preparation    |
| 4 | Research Source Paths    | Public-safe relative paths to supporting website pages       |
| 5 | Research Source          | Website or other supported research source                   |
| 6 | Research Status          | Completed / Manual Review / Recheck as applicable            |
| 7 | Research Reason          | Short operational explanation when needed                    |
| 8 | Pages Reviewed           | Count/record of the evidence collection scope                |

FAR-RIGHT AUDIT FIELDS      Review Count | Recheck Count | Researched At

Evidence stays attached to the research record

Research Source Paths and Research Source remain separate from the personalization text. The next stage can use concise facts without losing the ability to see where those facts came from.

## STEP 5

# Preserve uncertain cases instead of inventing facts

Weak research evidence does not remove a confirmed-form prospect from the campaign. The workflow keeps uncertainty visible and allows additional supported research or human review.

**COMPLETED**

Reliable personalization research was produced from the available evidence.

**MANUAL REVIEW**

Website and available supporting research do not provide enough reliable personalization evidence. A human decision is required.

**RECHECK**

A temporary technical condition prevented a reliable research pass. The record remains eligible for another controlled attempt.

**SOCIAL FALLBACK**

Recent public social information may support or substitute for weak website research when it is legitimately available and reliable.

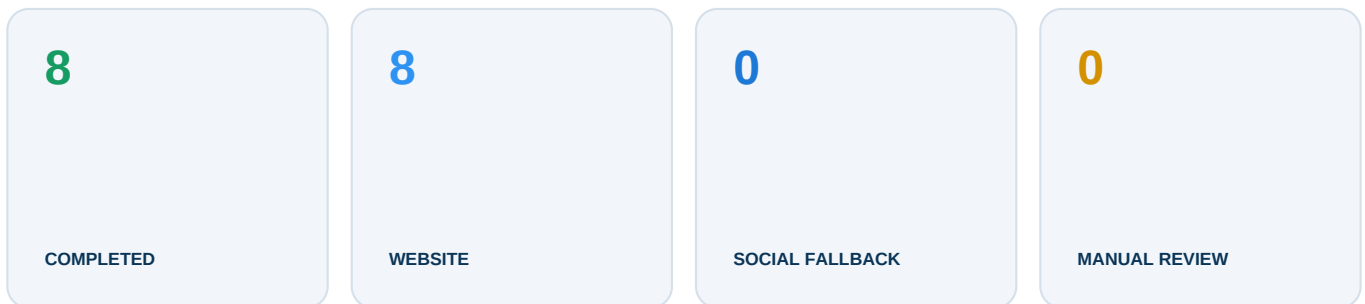
**KEY PIPELINE RULE**

A domain with a confirmed usable contact form is not discarded solely because website personalization evidence is weak. If reliable personalization cannot be established, preserve the domain and route it for Manual Review rather than inventing facts.

## STEP 6

## Finish with structured research ready for Video 4

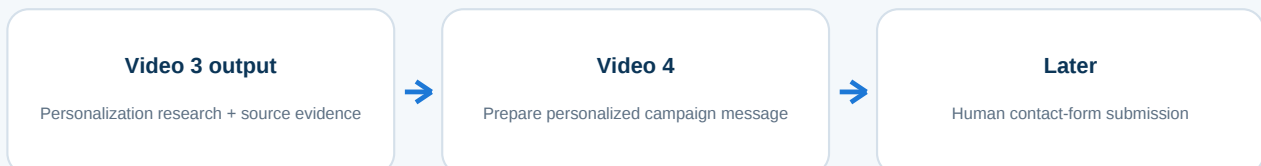
The locked real Video 3 run finishes with eight completed research records and a consolidated output that can feed the personalized-message stage without routine website re-research.



FINAL REAL RESULT    Recheck 0 | Research Pending 0 | Remaining 0

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### HANDOFF TO THE NEXT CFM STAGE



### Final stage boundary

Video 3 stops at documented research. It does not generate the outreach message and does not submit a contact form. Message preparation begins in Video 4; final submission remains human/manual.

## SUMMARY

# The prospect-research flow

Video 3 shows a controlled progression from a verified, contactable prospect to a concise evidence-backed research record ready for personalized message preparation.

1

**Verified prospect**

Start from a prospect that already passed the earlier relevance and contact-form workflow.

2

**Focused website research**

Use the prospect website as the primary source and review only a small number of useful pages.

3

**Concise personalization**

Produce short, factual, message-usable points - normally 3-5 and roughly 50-80 words total.

4

**Source evidence retained**

Keep Research Source Paths and Research Source separate from the personalization text.

5

**Uncertainty stays visible**

Use Manual Review or Recheck when reliable research cannot be established instead of inventing facts.

6

**Ready for Video 4**

Pass Completed research records forward for personalized campaign-message preparation; submission remains manual.

**KEY TAKEAWAY**

The process is designed to turn a verified prospect into concise, source-backed personalization research while keeping weak evidence visible and preserving a clean boundary before message generation.