

CFM - CONTACT FORM MARKETING

CFM in Action

Preparing Personalized Campaign Messages

Public process overview and companion guide to Video 4

A practical look at how ZAR Advertising combines completed prospect research with customer-agreed campaign instructions to prepare concise, personalized contact-form messages.



Workflow details and final counts come from the real locked Video 4 run; prospect identifiers are not exposed.

OVERVIEW

What Video 4 adds to the CFM workflow

Video 4 takes completed prospect research and turns it into controlled, customer-aligned subjects and contact-form messages without routinely researching the prospect website again.

CORE OPERATING PRINCIPLE

Test the campaign instructions first. Then personalize consistently from real research.

Customer-agreed framework

The campaign prompt defines the real offer, positioning, approved tone, CTA direction, subject rules and message constraints. It is reviewed and agreed before production generation begins.

Prospect-specific input

Completed Video 3 Personalization Research is appended for each prospect. The message is grounded in those facts rather than routine website re-research.

Auditable output

The tool stores the generated subject, message, status, word and character counts, plus the applied tone, CTA and subject-style directions.

VIDEO 4 BOUNDARY

Video 4 ends at Message Prepared. Prepared messages still move through internal checks and manual review before later human contact-form submission. The public workflow does not automate final submission.

STEP 1

Build the campaign messaging framework

Each customer campaign starts with one clear set of messaging instructions. The prompt reflects only information that is actually supplied and approved for that campaign.

Offer + positioning

What the customer actually provides

Tone + CTA

How the outreach should sound

Subject + body rules

How the message should be structured

CAMPAIGN PROMPT RULES

- One prompt/version represents one customer campaign.
- A materially different offer or campaign should use a new prompt/version.
- Empty or unknown claims are omitted rather than invented.
- The customer agrees the campaign framework; individual prospect messages do not require customer-by-customer approval.

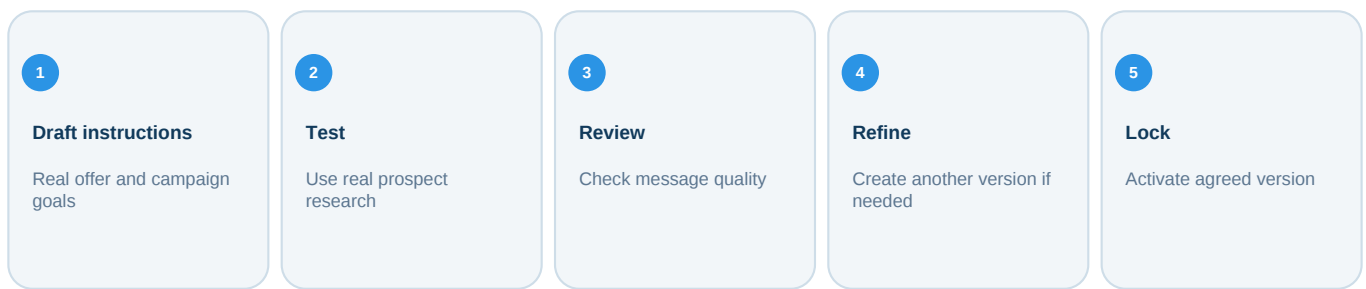
WHY THIS MATTERS

The messaging framework is locked before production so every prospect is approached from the same approved strategy, while personalization still comes from the individual prospect research.

STEP 2

Test, refine and lock the prompt

Prompt preparation is treated as a real quality-control stage. A first version may be useful, but production starts only after the campaign instructions have been tested against real prospect research and refined where necessary.



Quality over speed

Several prompt versions may be tested before a campaign is ready. The goal is not to generate as quickly as possible; it is to make the approved instructions dependable across a real prospect set.

Long-term service quality

Careful setup and consistent message quality provide a stronger foundation for long-term customer relationships, repeat campaigns and referrals without guaranteeing any of those outcomes.

LOCKED VERSION USED IN PRODUCTION

Once a prompt version is agreed and activated, the run freezes that exact campaign version so the instructions do not silently change midway through message preparation.

STEP 3

Apply controlled campaign variations

Variation is controlled rather than random. The customer can approve one or several options, and the tool assigns the approved directions consistently while the prospect research remains the main source of uniqueness.

8**tone options**

Examples include friendly/direct, warm/professional and thoughtful/practical.

5**cta directions**

Short call, brief meeting, reply invitation and other low-pressure directions.

5**subject styles**

Category-led, discoverability-led, SEO opportunity, specialist feature and business relevance.

CONTROLLED ASSIGNMENT

- Python assigns one approved Tone + CTA + Subject Style to each prospect and stores the selections with the run.
- Assignments survive pause/resume/recovery rather than changing randomly.
- If a customer approves only one option, that one option is used throughout the campaign.
- Variation must not create fake claims or artificial synonym swapping; the prospect research should still drive the message.

PUBLIC RESULT

In the final real eight-prospect run, all eight approved tones were used once while CTA and subject-style directions rotated across the records, producing visibly more varied messages without changing the approved campaign strategy.

STEP 4

Generate one subject and one message

The model receives the locked campaign instructions plus the current prospect research and returns exactly one concise subject and one contact-form message.

3-8**SUBJECT WORDS**

Concise and relevant; no clickbait or forced urgency.

60-100**BODY WORDS**

Normal target for a contact-form outreach message.

REAL**FORM LIMITS**

A genuine stricter character limit overrides the normal body target when supplied.

MESSAGE SAFETY / QUALITY RULES

- Use the supplied prospect research as business context, not as an invented SEO audit.
- Do not invent rankings, traffic, results, case studies, pricing, guarantees or unsupported customer claims.
- Avoid a generic company-name greeting; start naturally from the strongest relevant researched fact.
- Use conditional benefit language and a low-pressure short call / meeting / reply CTA.
- Preserve the combined [SUBJECT] and [BODY] package for the downstream workflow.

NO ROUTINE RE-RESEARCH

Video 4 normally uses the research already produced in Video 3. It does not repeatedly browse the prospect website simply to write the campaign message.

STEP 5

Write prepared messages into the campaign workbook

Results are stored as they are prepared so the operator can see the real campaign output, status and applied variation choices in one workbook.

Core message fields

Generated Subject
Generated Message
Message Status / Reason
Message Word Count
Message Character Count
Applied Character Limit

Audit / handoff fields

Message Package
Applied Tone
Applied CTA
Applied Subject Style
Generation Count
Recheck Count / Generated At

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RUN STATE AND LIVE EXCEL

SQLite remains the authoritative run state while Excel is the operator-visible output. Completed rows can update into the open workbook during processing, and the final synchronization keeps the visible workbook aligned with the committed run data.

8

MESSAGE PREPARED

0

MANUAL REVIEW

0

RECHECK

0

REMAINING

STEP 6

Keep the public workflow transparent and privacy-safe

The public demonstration shows real message preparation and real results while removing prospect-identifying values that are not needed to understand the process.

Publicly masked where needed

Original prospect domains
Company / Brand Name
App Current Domain
Activity prospect/domain details
Formula-bar identifying values
Identifying fragments inside generated subjects when necessary

Kept visible

Generated message content where public-safe
Message status and counts
Prompt/version concept
Approved variation framework
Real processing order and final totals
The fact that submission remains human/manual

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REAL TOOLS AND REAL DATA

The workflow is not a simulated dashboard. The public video uses the real application, real completed prospect research, real model calls and real workbook output. Identifiers are redacted for privacy; the underlying process and outcomes are not fabricated.

NEXT HANDOFF

Message Prepared is not the same as submitted. Prepared messages move through internal checks and manual review before the later human contact-form submission stage.

SUMMARY

The personalized-message preparation flow

Video 4 shows a controlled progression from completed prospect research to a prepared campaign message that is ready for internal/manual checks before human submission.

1

Completed prospect research

Start from Video 3 research that is already ready for message preparation.

2

Campaign framework prepared

Define the real offer, tone, CTA and subject/body rules for the customer campaign.

3

Prompt tested and refined

Test against real prospect research; create additional versions when quality needs improvement.

4

Agreed version locked

Freeze the approved campaign prompt before production generation.

5

Controlled variation applied

Assign an approved Tone + CTA + Subject Style without changing the campaign strategy.

6

Subject + message prepared

Write the generated package and audit fields into the campaign workbook.

KEY TAKEAWAY

Quality is built before and during generation: customer-agreed campaign instructions are tested, prospect research remains factual, approved variations are controlled, and the resulting messages stay auditable before later manual outreach.