

Business Research Rulebook

Data Availability & Fallbacks

- For **every** metric or data point: if no reliable browser-cited source exists, state:

"No reliable data found for <data_label>."
- Skip speculation; proceed to the next section.

1. Overview

- **Founded:** Year (About Us, Crunchbase, Wikipedia).
- **Headquarters:** Street + city/state.
- **Employees:** Estimated range (LinkedIn, ZoomInfo).
- **Annual Revenue:** Public or estimated (D&B, S&P Capital IQ).
- **Business Category:** Vertical (e.g. Retail Apparel).
- **Services:** 1-line summary.
- **Digital Alignment & Reputation Scores:** (AudienceSCAN® or similar; else note unavailability).

2. Company Background

- **Narrative summary** covering:
 - Founding story and history
 - Growth milestones and expansions
 - Geographic footprint and market presence
 - Ownership and leadership
- **Sources:** Company site, press articles, founder interviews.
- Include citations (e.g., [^1]) wherever possible.

3. Advertising Footprint

- **Channels & Impact:**
 - **Search Ads:** % action rates, campaign dates (SEM blogs; else fallback).
 - **Display Ads:** % action rates, sample creatives (Adbeat; else fallback).
 - **OTT/CTV:** placements & dates (YouTube, trade sites; else fallback).
 - **Social Ads:** LinkedIn, Facebook, Instagram examples (Ads libraries; else fallback).
 - **Email/OOH:** summary if available (press or case studies; else fallback).
 - **Keywords & Spend Trends:** Top paid keywords, CPCs, volumes (SEMrush, SpyFu; else fallback).

- **Website Tech & Tracking:** pixels, chatbots (BuiltWith, Tech blog; else fallback).
- **Creative Samples:** Hyperlinked visuals (Adbeat, LinkedIn, YouTube; else fallback).
- Identify strengths and gaps in current strategy.

4. Customer Profile

- Describe target audience:
 - **Buyer Personas:** demographics/psychographics (survey blogs; else fallback).
 - **Target Behaviors:** device/content patterns (AudienceSCAN®; else fallback).
 - Segments
- Geographic targeting (local, regional, national)
- **Base insights** on web language, content, reviews, and presence.

5. Pain Points / Need for Marketing

- Explain why advertising could help:
- **Operational or growth challenges:** reviews, sentiment (Yelp, news; else fallback).
- **Public perception issues** (e.g. outdated image)
- **Goals:** expansion or campaign objectives (press releases; else fallback).
- **Competitive threats**
- Use direct quotes or sourced pain points where possible.

6. Competitive Landscape

- Provide competitor benchmarking:
 - 2–3 main competitors
 - their ad strategies and strengths
 - Compare what they do that this lead does not
- **Competitor Ads:** PPC, display, social (Adbeat, SpyFu; else fallback).
- **Edge Analysis:** targeting, creative style.
- **Benchmarks:** spend, share of voice, keyword overlap (DataForSEO; else fallback).
- Use local, vertical-specific or media-mention competitors.

7. Advertising Opportunity Gap

- Identify what the lead is missing that STMG can solve:
 - **Gaps** in ad channel usage (e.g., no local media, no print)
 - **Missing Channels:** e.g. TikTok, email automation.
 - **demographic gaps**
 - **Untapped Messaging:** storytelling, localized promos.
- Highlight STMG's unique value (local reach, segmentation, multimedia etc)

8. Key Contacts

- **Pull all contacts from AdPoint CRM first.** Use fuzzy name matching to ensure coverage. Resort to public sources **only if** no relevant entries are found in AdPoint
- **Instructions:**

- **From AdPoint CRM:**
 - List **all active contacts** associated with the business.
 - Include: Full Name, Title/Role, Email, Phone (if available).
 - Identify Contact Category (e.g., “Decision Maker – Primary,” “Creative,” etc.)
 - Note AdPoint CRM status: “Client,” “Prospect,” “Lost,” or “No Record.”
 - Clearly state: **“Source: AdPoint CRM”**
- **If No AdPoint Record Exists:**
 - Search LinkedIn, company websites, and press.
 - Include: Full Name, Role/Title, Email (if listed), LinkedIn URL.
 - Mark clearly: **“Source: Public (LinkedIn/Website/etc.)”**

Example (AdPoint-based):

John Doe – Executive Director

Email: john@501commons.org | Phone: 206-111-2222

Contact Category: Decision Maker – Primary

Source: AdPoint CRM

Example (Fallback/Public):

Jane Doe – Marketing Manager

Email: jane.doe@acme.com | [LinkedIn](#)

Source: LinkedIn Profile

9. Tactical Next Steps

- **Outreach Strategy:** cadence & channels.
- **Value Proposition:** tailored angles.
- **Assets to Prepare:** case studies, samples.
- **Follow-Up Plan:** timing & next touches.
- Make it strategic and tied to insights from earlier sections.

10. Strategic Metrics & Reporting

- **Survey Benchmarks:** action rates (AudienceSCAN®; else fallback).
- **Performance Tracking:** GA, platform dashboards (else fallback).