

RESEARCH + QUALIFICATION AI / SEARCH VISIBILITY OUTBOUND

Rejecting 70% of the market before outreach

70.3%

of 279 sourced companies rejected before activation. Only 83 passed qualification.

A prospecting system is valuable because it can decide which parts of a market deserve attention.

For a high-end AEO/SEO agency, **TheClaygency (TCA)** helped build and operate a research-first outbound system that sourced 279 companies. Only 83 passed qualification.

The purpose of the system was not to turn every company into a contact. It was to stop the wrong companies before outreach began.

01 – THE BUSINESS PROBLEM

The client sold sophisticated AI and Search Visibility work to established brands: travel companies, consumer brands, and businesses with meaningful digital visibility, large enough to justify the engagement. But a company could appear to match the market and still be a poor prospect. It might:

Have insufficient US presence

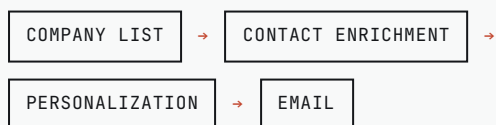
Be too small, or below the revenue threshold

Sit in an excluded segment

Already be in the client's pipeline

Lack research that produces a defensible reason for outreach

02 – WHY ENRICHMENT WASN'T QUALIFICATION



A normal outbound sequence assumes the company deserves to be contacted before enough evidence has been gathered to know whether that is true. We reversed the order. Before investing in contacts, custom research or campaign activation, the company had to pass a series of gates.

~~How do we find more travel and consumer companies?~~

Which companies survive enough scrutiny to justify expensive research and personalized activation?

Cheap gates first, expensive research after

01

The qualification system

The workflow evaluated every sourced company against practical constraints. Only after a company passed these gates did it move deeper into contact sourcing, enrichment and activation.

Existing relationship / pipeline	Market exclusions, incl. cruise lines	Sufficient US presence
Active and valid company	Above 100 employees	Above \$20 million revenue

02

What happened to the original market

Most systems are designed to celebrate how many records they can push forward. This one was designed to make it easy to say **no**. Every rejected company represented research, enrichment and outreach effort that did not need to be spent downstream.

279

companies sourced

83

qualified (29.7%)

196

stopped before becoming campaign-ready

DOCUMENTED EXCLUSION REASONS

94	41	36	12
insufficient US presence	cruise-line companies	at or below the employee threshold	at or below the revenue threshold

03

Researching the opportunity

Passing the gates did not mean "send email." The campaign centered on personalized **AI + Search Visibility Snapshots**, so the system had to understand how each qualified company appeared in AI-answer environments and conventional organic search, compared with relevant competitors.

AI VISIBILITY · AHREFS BRAND RADAR

CHATGPT

GEMINI

GOOGLE AI OVERVIEWS

ORGANIC SEARCH · AHREFS SITE EXPLORER

ORGANIC KEYWORDS

TRAFFIC

TRAFFIC VALUE

DOMAIN RATING

REFERRING DOMAINS

HISTORICAL TRENDS

04

From research to a prospect-specific asset

For qualified companies with usable evidence, the workflow created personalized Snapshot pages. Outreach could then reference research already assembled for the specific account, rather than generic claims about AI visibility.

PAGE GENERATION

Hermes

HOSTING + TRACKING

Cloudflare

ACTIVATION

Instantly

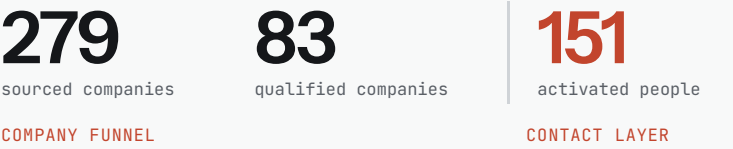
From target market to replies

01	TARGET MARKET
02	COMPANY SOURCING
03	DNC / PIPELINE CHECK
04	SEGMENT EXCLUSIONS
05	US-PRESENCE CHECK
06	COMPANY-SIZE CHECK
07	REVENUE CHECK
08	QUALIFIED ACCOUNT
AI VISIBILITY RESEARCH	SEARCH RESEARCH
09	EVIDENCE / PUBLISHABILITY CHECK
10	PERSONALIZED SNAPSHOT
11	CONTACT IDENTIFICATION
12	CONTACT ENRICHMENT
13	MESSAGE SELECTION
14	CAMPAIGN ACTIVATION
🔄	REPLIES + FEEDBACK

The expensive steps happen after the cheaper qualification gates. That ordering is intentional.

83 companies became 151 campaign contacts

Account qualification and contact activation are different operating stages, measured in different units. Combining them into one funnel would obscure how the system actually worked.



The personalized research system

CLAY	Qualification, company enrichment, table dependencies, contact sourcing, contact enrichment and campaign-ready outputs
AHREFS	AI-visibility and organic-search evidence
HERMES	Orchestrated research, page generation and rendering, turning structured data into account-specific Snapshot pages
CLOUDFLARE	Pages, Functions and D1 for the personalized pages and tracking infrastructure
INSTANTLY	Campaign activation for qualified contacts and matched messaging
SLACK	Reply/event monitoring and operating communication

The important point was not the number of tools. It was the dependency between them.

Evidence had to survive another gate

What the evidence allows us to say

Research data alone is not automatically a prospecting insight. A metric can be technically real and still support a bad claim. The system had to distinguish between the evidence we have and what that evidence allows us to say.

Tracked AI-answer appearance	≠	universal market share
Estimated traffic value	≠	revenue
A missing citation in a limited dataset	≠	"AI never recommends you."
A visibility gap	≠	a causal claim about lost business

GENERATE MORE COPY

Suppress weak claims.

Production exposed weaknesses

The system was not perfect on its first pass. Real use showed where it needed work:

BROAD MARKET DEFINITIONS	RESEARCH QA
OVERREACHING EARLY COPY	PAGE-GENERATION RELIABILITY
REVIEW WORKLOAD	

Broad definitions such as "travel" created imperfect fits. Some generated claims had to be tightened because early copy could say more than the underlying evidence supported.

That is why the workflow needed to be operated rather than merely designed. The feedback refined qualification, set stronger boundaries on research claims, added human review to automation and improved system reliability.

Do not automate uncertainty.

The temptation in modern GTM systems is to connect database, AI, enrichment and sending infrastructure as quickly as possible. But automation only makes an uncertain process run faster.

Research before automation

FIRST

Is this actually the right kind of company?
Does it meet the commercial thresholds?
Is there a defensible reason to contact it?
Does the research support what we intend to say?

ONLY THEN

Who should we contact?
How should we contact them?
What should the message say?

From research to matched outreach

QUALIFIED COMPANY	AI + SEARCH RESEARCH	EVIDENCE CHECK	RESEARCH CLASSIFICATION	PERSONALIZED SNAPSHOT	MATCHED OUTREACH
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The purpose of research is to make better decisions before the email exists.

The engagement connected sourcing, qualification, AI and search research, claim validation, personalized assets, contact enrichment, activation and operational QA into a single prospecting workflow that entered live production.

PRODUCTION WORK DELIVERED

279

companies sourced

83

companies qualified

70.3%

196 companies rejected before activation

151

contacts activated from the qualified-company set

Right company

279 companies entered. 83 survived company qualification.

Right reason

AI and search research tested whether a defensible opportunity existed.

Right people

Relevant contacts were identified only after the account passed the earlier gates.

Right message

Messaging followed the available evidence rather than inventing a reason to make contact.

Technology

CLAY	AHREFS BRAND RADAR	AHREFS SITE EXPLORER
HERMES	CLOUDFLARE PAGES	CLOUDFLARE FUNCTIONS
CLOUDFLARE D1	INSTANTLY	

Plus supporting enrichment, monitoring and workflow components. The technology enabled the operation. It did not define the strategy.

The broader principle

~~HOW MANY LEADS DID WE GENERATE?~~

How many bad prospects did the system correctly stop?

In this engagement, most of the sourced market never reached activation. That was not lost volume. It was avoided waste.

Sometimes the best prospecting system is the one that knows who not to contact.

Need a prospecting system that can say "no"?

TCA builds research and prospecting operations for established B2B companies. We turn ICP assumptions into explicit qualification logic, test that logic against the real market, and connect the companies that survive to research, contacts and activation.

SEE IF YOUR COMPANY IS A FIT →

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