

SOURCE PLACEMENT

Placement Opportunity Qualification Manual

A page-first system for scoring opportunities, researching contacts,
pitching responsibly and reporting the full funnel.

BUILT TO BE USED

Decision frameworks

Working registers

Implementation worksheets

2026 FIELD EDITION / 12 PAGES

HOW TO USE THIS MANUAL

A working document, not a one-page checklist.

Use the explanation on each page to make a decision, then complete the adjacent register or worksheet. Assign owners and dates. Revisit the same pages after a launch, campaign or platform-policy change so the record becomes useful over time.

01

Score the page before finding the person.

QUALIFICATION MODEL

02

Use a 25-point rubric with observable anchors.

ANCHORED SCORE

03

Remove weak opportunities before outreach.

DISQUALIFIERS

04

Write the case for inclusion before the pitch.

PAGE ANALYSIS

05

Find the person responsible for the page.

CONTACT MAP

06

Build a concise, evidence-led outreach note.

PITCH BRIEF

07

Use a respectful outreach sequence.

FOLLOW-UP

08

Give the editor material that survives scrutiny.

EVIDENCE PACK

09

Report the full funnel without hiding the work.

PIPELINE REPORT

10

Keep the claim attached to its source and its limit.

SOURCE NOTES + LIMITS

QUALIFICATION MODEL

Score the page before finding the person.

A placement opportunity is a specific page where inclusion would improve the resource for its reader. Score the page on relevance, credibility, freshness, inclusion fit and contactability before doing contact research.

DECISION PRINCIPLES

- The unit of work is the page, not the domain.
- A large publication can host an irrelevant opportunity.
- An achievable update still needs editorial merit.
- A score prioritizes judgment; it does not replace it.

ACTION CHECK

- ☐ Save exact URL.
- ☐ Name the buyer intent.
- ☐ Check current inclusions.
- ☐ Assess update history.
- ☐ Record contact path.

WORKING REGISTER

Capture the evidence, owner and next decision. Use one row per page, prompt, source or issue.

PAGE	SCORE	STATUS

DECISION / NOTES / NEXT REVIEW

Treat the completed page as a dated observation, not a permanent truth.

ANCHORED SCORE

Use a 25-point rubric with observable anchors.

Score five dimensions from zero to five. Zero means absent or disqualifying; three means credible but incomplete; five means directly relevant, current, well-maintained and actionable. Record the evidence behind every score.

DECISION PRINCIPLES

- Relevance asks whether the reader and category match.
- Credibility examines authorship, sourcing and editorial integrity.
- Freshness considers update cadence and current facts.
- Contactability measures a legitimate route to the responsible person.

ACTION CHECK

- ☐ Score relevance.
- ☐ Score credibility.
- ☐ Score freshness.
- ☐ Score inclusion fit.
- ☐ Score contactability.

WORKING REGISTER

Capture the evidence, owner and next decision. Use one row per page, prompt, source or issue.

DIMENSION	0-5	EVIDENCE

DECISION / NOTES / NEXT REVIEW

Treat the completed page as a dated observation, not a permanent truth.

DISQUALIFIERS

Remove weak opportunities before outreach.

Disqualify pages that are irrelevant, deceptive, abandoned, pay-to-play without disclosure, factually unsafe or impossible to update responsibly. A low-volume campaign with strong fit is better than inflated outreach to poor pages.

DECISION PRINCIPLES

- Do not use authority metrics as a substitute for fit.
- Undisclosed payment risk belongs in the record.
- Outdated or scraped pages can damage credibility.
- A missing brand is not automatically an editorial gap.

ACTION CHECK

- ☐ Check ownership.
- ☐ Review disclosure policy.
- ☐ Inspect update date.
- ☐ Verify factual quality.
- ☐ Document disqualification.

WORKING REGISTER

Capture the evidence, owner and next decision. Use one row per page, prompt, source or issue.

RISK	EVIDENCE	DECISION

DECISION / NOTES / NEXT REVIEW

Treat the completed page as a dated observation, not a permanent truth.

PAGE ANALYSIS

Write the case for inclusion before the pitch.

Document the page purpose, current criteria, brands included, missing reader value and the exact evidence the client can supply. If the case cannot be stated without mentioning a backlink, it is not ready.

DECISION PRINCIPLES

- Reference the exact page and section.
- Respect the page's existing editorial criteria.
- Offer verifiable information, not adjectives.
- Explain the reader benefit in one sentence.

ACTION CHECK

- ☐ Summarize page purpose.
- ☐ List current criteria.
- ☐ Identify the gap.
- ☐ Attach supporting proof.
- ☐ Draft reader benefit.

WORKING REGISTER

Capture the evidence, owner and next decision. Use one row per page, prompt, source or issue.

PAGE FACT	GAP	PROOF

DECISION / NOTES / NEXT REVIEW

Treat the completed page as a dated observation, not a permanent truth.

CONTACT MAP

Find the person responsible for the page.

The useful contact may be the named writer, commerce editor, category manager, directory owner or corrections desk. Record the evidence for the role and use a legitimate business contact route.

DECISION PRINCIPLES

- Author bylines are stronger than generic databases.
- Recent responsibility matters more than an old title.
- Respect opt-outs and channel norms.
- Contact research should be auditable.

ACTION CHECK

- ☐ Check byline.
- ☐ Review masthead.
- ☐ Confirm current role.
- ☐ Save contact source.
- ☐ Choose primary channel.

WORKING REGISTER

Capture the evidence, owner and next decision. Use one row per page, prompt, source or issue.

PERSON	ROLE	EVIDENCE

DECISION / NOTES / NEXT REVIEW

Treat the completed page as a dated observation, not a permanent truth.

PITCH BRIEF

Build a concise, evidence-led outreach note.

Open with the exact resource, state the missing reader value, provide the proof and make a specific low-friction ask. Avoid pretending inclusion is owed or leading with a backlink request.

DECISION PRINCIPLES

- Personalization should be about the work, not trivia.
- One clear claim is stronger than a product dump.
- Make verification easy.
- Leave room for an honest no.

ACTION CHECK

- ☐ Reference exact page.
- ☐ State reader value.
- ☐ Include proof link.
- ☐ Make one ask.
- ☐ Add accountable contact.

WORKING REGISTER

Capture the evidence, owner and next decision. Use one row per page, prompt, source or issue.

PITCH PART	COPY	PROOF

DECISION / NOTES / NEXT REVIEW

Treat the completed page as a dated observation, not a permanent truth.

FOLLOW-UP

Use a respectful outreach sequence.

Plan the initial note and a small number of useful follow-ups. Each follow-up should add clarity, evidence or a relevant update. Stop when the sequence is complete or the recipient declines.

DECISION PRINCIPLES

- Cadence depends on source type and urgency.
- A follow-up should add value, not repeat pressure.
- Record replies and opt-outs immediately.
- A decline is a valid campaign outcome.

ACTION CHECK

- ☐ Set send date.
- ☐ Schedule follow-up one.
- ☐ Add new evidence.
- ☐ Record response.
- ☐ Close or advance.

WORKING REGISTER

Capture the evidence, owner and next decision. Use one row per page, prompt, source or issue.

TOUCH	DATE	OUTCOME

DECISION / NOTES / NEXT REVIEW

Treat the completed page as a dated observation, not a permanent truth.

EVIDENCE PACK

Give the editor material that survives scrutiny.

Prepare an official fact sheet, product or service details, pricing context, primary evidence, limitations, image rights and an accountable contact. Keep every claim current and easy to verify.

DECISION PRINCIPLES

- A fact sheet is not a sales deck.
- Limitations increase trust when they are material.
- Assets need clear usage rights.
- Version and date the evidence pack.

ACTION CHECK

- ☐ Verify core facts.
- ☐ Link primary evidence.
- ☐ State limitations.
- ☐ Confirm image rights.
- ☐ Add owner and date.

WORKING REGISTER

Capture the evidence, owner and next decision. Use one row per page, prompt, source or issue.

ASSET	VERSION	OWNER

DECISION / NOTES / NEXT REVIEW

Treat the completed page as a dated observation, not a permanent truth.

PIPELINE REPORT

Report the full funnel without hiding the work.

Track opportunities reviewed, qualified pages, contacts verified, pitches, replies, conversations, declines, updates and published placements. Keep AI mentions and citations as a separate observation layer.

DECISION PRINCIPLES

- Activity is controllable; editorial acceptance is not.
- A published placement and an AI visibility change have different dates.
- Include disqualified opportunities and reasons.
- Report next action for every active item.

ACTION CHECK

- ☐ Count reviewed pages.
- ☐ Count qualified pages.
- ☐ Record replies.
- ☐ Record editorial outcomes.
- ☐ Add next action.

WORKING REGISTER

Capture the evidence, owner and next decision. Use one row per page, prompt, source or issue.

STAGE	COUNT	NEXT

DECISION / NOTES / NEXT REVIEW

Treat the completed page as a dated observation, not a permanent truth.

SOURCE NOTES + LIMITS

Keep the claim attached to its source and its limit.

A field manual should make the work repeatable without turning research into certainty. Record the original source, publication date, exact claim, population or platform studied, and the boundary between a documented finding and your team's interpretation.

DECISION PRINCIPLES

- Link to original documentation or research whenever it is available.
- Separate a platform requirement from a community convention or agency recommendation.
- Do not convert correlation, a case example or an illustrative score into a guarantee.
- Recheck crawler, schema and search guidance before implementation because platforms change.

ACTION CHECK

- ☐ Record the source URL and access date.
- ☐ Copy the exact claim in your own words.
- ☐ Note the methodology or platform scope.
- ☐ Write the practical implication separately.
- ☐ Set a date to revalidate the guidance.

EVIDENCE LEDGER

Use one row per claim. The evidence column should name the original document, not a secondary summary.

CLAIM	SOURCE	LIMIT

DECISION / NOTES / NEXT REVIEW

Treat the completed page as a dated observation, not a permanent truth.