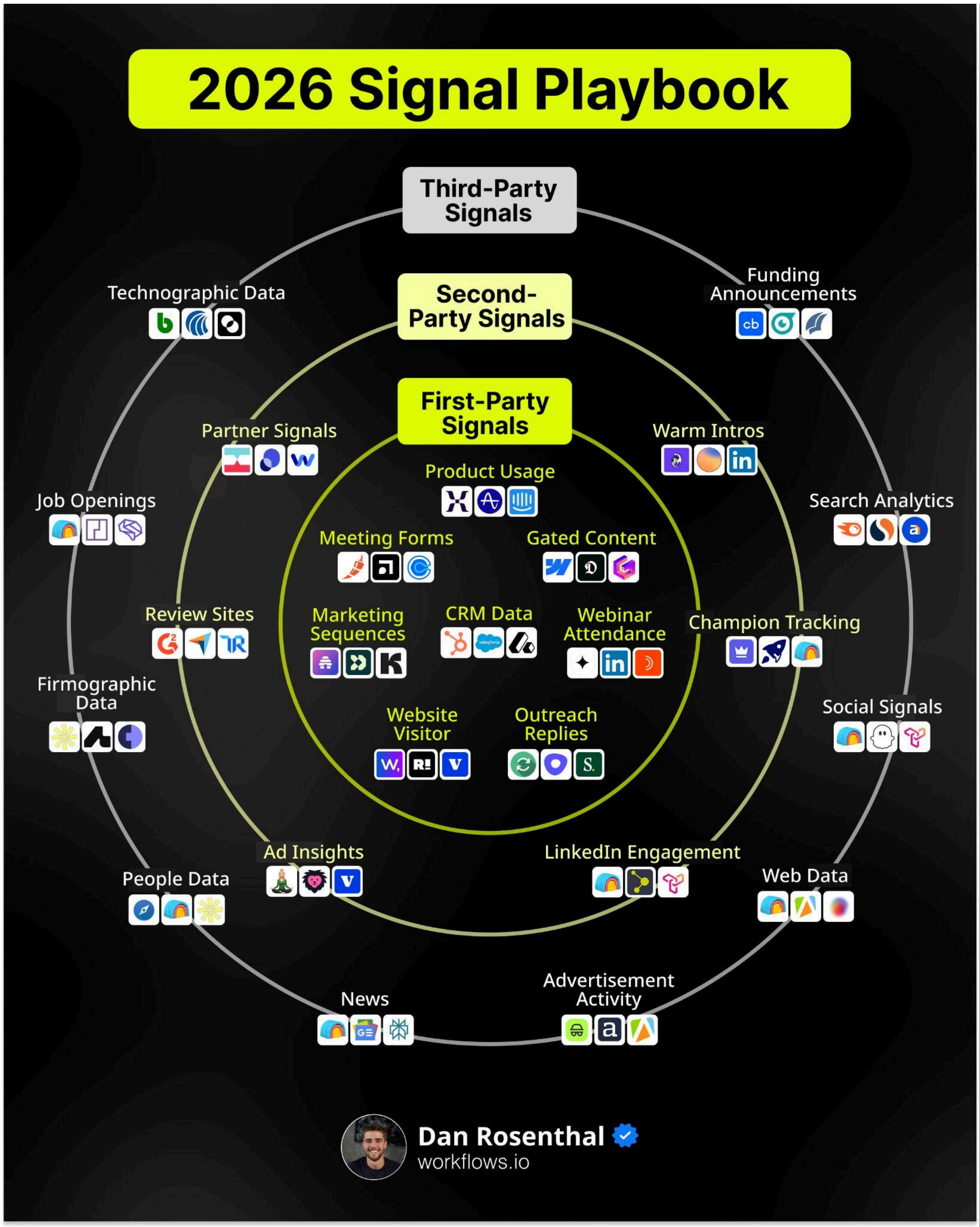
The 2026 Signal Playbook



How it works?

Step 1: Define the Purpose of Your Signal System

Establish the core outcomes your signal engine must drive:

- Score account awareness & buying readiness
- Trigger automated outbound / ads / tasks
- Push high-priority CRM + Slack alerts to reps
- Track expansion, retention, and churn risk
- Build high-intent ABM segments dynamically

Step 2: Map Your Signal Categories

All signals fall into three universal buckets:

- First-party: Product usage, website activity, CRM interactions
- Second-party: Partner overlaps, referral networks, ad engagement
- Third-party: Public data (funding, hiring, tech changes, social activity)

Step 3: Instrument First-Party Signals

Capture the highest-quality engagement signals your company owns:

- CRM activity (emails, replies, calls, tasks)
- Product analytics (activation, feature use, usage depth)
- Website events (visits, pricing page, form submissions)
- Marketing & content events (webinars, downloads, campaigns)

Step 4: Add Second-Party Signals

Expand visibility using partner ecosystems and shared intent sources:

- Partner overlaps
- Warm intros or mutual connections
- Review-site behaviour

- Ad and LinkedIn engagement

Step 5: Layer Third-Party Signals

Track buying readiness cues happening outside your ecosystem:

- Tech-stack changes, funding rounds, hiring spikes
- Market news and category activity
- Social engagement & keyword/search trends
- Firmographic + technographic enrichment updates

Step 6: Centralize All Signals

Bring everything together into one system of record:

- Ingest all signals into CRM or your warehouse
- Use ETL/integrations to eliminate data silos
- Tag each signal with source, timestamp, account ID, and contact ID

Step 7: Normalize & Score

Clean and structure all signals into measurable scoring inputs:

- Standardize data formats across sources
- Weight signals by type, recency, intensity, and impact
- Convert raw signals into Awareness Stages:
    - Identified
    - Aware
    - Interested
    - Considering
    - Selecting

Step 8: Enrich Accounts & Contacts

Combine fit + intent to maintain a real-time GTM profile:

- Merge firmographic & technographic fit with live signal data

- Maintain updated tiers, personas, and ownership inside CRM
- Track account health, readiness, and post-sale risk in one view

Step 9: Trigger Automations

Activate the entire GTM engine when meaningful signals fire:

- Launch outbound sequences when awareness increases
- Trigger ads, retargeting, or ABM plays for high-intent accounts
- Create tasks for AEs/SDRs directly from CRM events
- Push top-priority alerts to Slack for instant follow-up

Step 10: Build ABM Lists & Post-Sale Monitors

Use signals to power full-funnel revenue workflows:

- Combine fit + intent to create precise ABM segments
- Track usage decline or champion changes for retention motions
- Surface upsell/cross-sell moments using feature adoption signals

Step 11: Close the Feedback Loop

- Feed meeting + deal outcomes back into scoring logic
- Increase weights for signals that drive revenue; decrease noise
- Review dashboards monthly to reassess signal ROI and effectiveness