Awareness Scoring Playbook 2026

Step-by-step Breakdown

Step 1: Define account-level awareness stages

Define the five awareness stages:

- **Identified** = your target account list, no engagement yet.
- **Aware** = custom
- **Interested** = custom
- **Evaluating** = custom
- **Selecting** = open deal

Step 2: Define variables for Aware, Interested, Evaluating

Some of the variables you might wanna take into consideration include:

- Outbound email opens
- Multiple LinkedIn ad clicks
- Website visits (deanonymized)
- Low-level LinkedIn ad engagement
- Positive reply to outbound email
- High LinkedIn ad engagement
- LinkedIn Connections
- Content downloads
- Demo request

Step 3: Target Account List

Use multiple databases to build your target account list:

- Create a broad Tam Map using databases filters (Apollo, AI Ark)
- Upload companies to Clay to qualify with Claygent
- Qualified companies (and tiered) = your target account list
- Create/Update object (company) from Clay to HubSpot

Step 4: Track and aggregate signals in one Clay Workbook

Define which 1st, 2nd, and 3rd party signals you'd like to track. Examples include:

- Website visits via **HubSpot**, **Warmly**
- Social engagement (likes, comments, reports) via **Trigify**, **Clay**
- Ad exposure at the account level via **Fibbler**, **zenABM**
- Community participation via **Slack**, **Skool**
- Attendance at webinars via **Sequel.io**, **Luma**

Step 5: Sync back signals to CRM

Push them as **custom event** and not as property.

- Create a property called Awareness stage
- 5 single-select options:
    - **Identified**
    - **Aware**
    - **Interested**
    - **Evaluating**
    - **Selecting**

The only signals that are stored as property instead of custom event are:

- CEO Connections (via LinkedIn)
- LinkedIn Ads Engagement (via Fibbler)

Step 6: Create HubSpot lists (segments) for each awareness stage

Select five lists for each of the 5 awareness stages:

- The filters for each list are all "or" criteria for each awareness stage
- Example for Aware stage:
    - Outbound Email Open completed ≥3 times in last 30 days
    - Website Visitor completed ≥1 time in last 30 days
    - LinkedIn Ad Engagements (30 days) < 4

Step 7: Create HubSpot workflow

One workflow to auto-update awareness stage property

- **Trigger**: Account has entered any of the lists
- **Check branches** in this order (highest to lowest): **Selecting, Evaluating, Interested, Aware, Identified**
- **Send webhook**: Whenever awareness stages change send data to Clay via webhook

Step 8: Use Clay to create awareness stage summaries

- Import companies in Clay from step 7
- Lookup HubSpot properties for signals
- Use HTTP API to lookup all custom events for signals
- Create a giant prompt in Claude to create the summary about why they changed awareness stage