Signal Activation Playbook

Playbook Visual Link: Signal Activation Guide.jpeg

How it works?

Step 1: Capture signals from all sources

Collect signals across 1st, 2nd, and 3rd party sources.

- Pull signals from:
  - CRM, website visits, marketing engagement
  - Review sites, partner networks, LinkedIn engagement
  - Technographics, news, social activity
- Route signals into your orchestration layer using:
  - Webhooks
  - APIs
  - Native integrations

Step 2: Aggregate signals into one system

Centralize all signals into a single table.

- Use:
  - **Clay**
  - **Cargo**
- Create a master table where each row represents:
  - One signal
  - One company or contact

Step 3: Normalize and deduplicate data

Standardize all key fields before enrichment.

- Create columns for:
  - Company domain
  - LinkedIn URL

    - Job title
- Use formulas to:
    - Clean data
    - Standardize formats
    - Remove duplicates

Step 4: Enrich company and contact data

Add missing data to each signal.

- Use:
    - **Clay**
    - **BetterContact**
    - **Findymail**
- Enrich:
    - Firmographics
    - Contact details
    - Technographics

Step 5: Lookup records in CRM

Check whether the account already exists.

- Lookup:
    - Company by domain
    - Contact by email
- Use:
    - **HubSpot**
    - **Salesforce**
- Identify:
    - Existing account
    - Assigned owner

Step 6: Qualify accounts using AI

Filter signals based on ICP.

- Use:

- **Clay**
    - **Claude**
    - **ChatGPT**
    - **Perplexity**
- Evaluate:
    - Company fit
    - Persona fit
- Keep only qualified accounts

Step 7: Score accounts into tiers

Prioritize accounts for action.

- Use:
    - Firmographics
    - Technographics
    - Signal strength
- Assign:
    - Tier 1: strong fit
    - Tier 2: good fit
    - Tier 3: okay fit

Step 8: Segment accounts

Group accounts for routing and messaging.

- Segment by:
    - Company size
    - Industry
    - Location
    - Business type

Step 9: Route signals to reps

Assign each signal to the correct owner.

- Maintain a live rep list
- If owner exists → keep owner

- If no owner → assign (round-robin)
- Use segmentation for distribution

Step 10: Sync data to CRM

Push structured data into CRM.

- Update:
    - Companies
    - Contacts
    - Custom events (**HubSpot**)
- Track multiple signals per account

Step 11: Activate signals

Turn qualified signals into outbound and marketing actions.

- Execute **retargeting campaigns** via:
    - Google Ads
    - LinkedIn Ads
- Launch **automated outbound sequences**:
    - Instantly
    - HeyReach
- Send **connection requests and LinkedIn DMs**:
    - HeyReach
    - Sales Navigator
- Run **manual outreach** for tier 1 accounts:
    - Nooks
- Trigger **Slack alerts** for monitoring
- Create **CRM tasks** for follow-up