Signup to sales activation

Service offer brief | Proposed quick-win sprint | Updated 30 October 2026

This offer helps B2B products with self-serve adoption and enterprise sales find promising accounts already using the product. The entry project connects signup identity, account fit and product behavior to an accountable seller.

Positioning: Find promising enterprise accounts in your self-serve signups and give Sales a reviewed account brief, qualification reason and owner.

Headline: Your next enterprise customer may already be using your product.

Entry CTA: Review your signup-to-sales handoff with Hamid.

First workflow

The entry sprint covers enterprise-fit qualification: resolve signups to accounts, assess the agreed ICP and route reviewed candidates with evidence and ownership. Keep business fit separate from usage. Adoption-based qualification, identity backfills and expansion are separately scoped extensions.

Proposed quick-win package

Included	Proposed boundary
Delivery	A 10-working-day build sprint after the readiness check. Confirm the completion date and review points before kickoff.
Population	One product and signup cohort, up to 500 signup records across historical replay and the initial live test. Count people, workspaces and accounts separately.
Connections	One signup source, one existing product-event feed if needed, one CRM and one handoff route. Verify access and supported connection methods first.
Review	One agreed sample, one consolidated refinement round and one documented release or keep-the-baseline decision.
Observation	A separate 30-calendar-day observation window after release. The client operates observation unless ongoing support is contracted.

These are proposed package limits confirmed after reviewing access, data quality and the receiving owner's capacity. Missing access or changed requirements require a revised scope and date. Additional records, integrations, variants and review rounds are scoped separately.

Buyer and qualification

The buyer is a Head of Growth, Product Growth or RevOps. Product Analytics supplies usage data; Sales leadership defines a worthwhile handoff. Useful triggers include growing signup volume, a new enterprise offering, valuable users missing product-qualified-lead thresholds, or unowned self-serve accounts.

A suitable client has a differentiated sales-assisted offer, reliable signup records, usable company identifiers, accessible product events and sellers who can act. The account-level value should justify the research and sales effort. Large traffic volume alone does not establish fit.

Qualify out clients whose self-serve offer already meets the entire customer need, whose product events cannot be joined to accounts, or whose sales team cannot accept additional work. Do not assume that a recognizable company name means the user controls a buying decision.

This package specifically requires a product-led SaaS motion. Recruitment client enquiries and candidate applications have different entities and acceptance rules and require their own scope.

Before kickoff, provide signup and workspace identifiers, the relevant product-event feed, CRM ownership and suppression data, approved customer criteria and a named receiving sales lead.

How we work together and fees

Hamid leads design, build and testing in Clay and your existing stack. Your Growth, Sales and RevOps subject experts supply business context, review examples and validate results; system owners provide access and support connections. Agree participation for each stage before kickoff. The CRM remains authoritative for its assigned commercial fields.

Quote a fixed service fee after the readiness check and before kickoff. The client provides and pays for all required software, licenses, workspaces and usage, including Clay and connected tools. Software costs and any media spend are separate from service fees.

The client owns the workspace, connected accounts, relevant code, configuration, evidence mappings and operating records. Include practical operator instructions. Optional Clay or practical training, ongoing operation, campaign sending, media buying and additional plays require an agreed scope.

The build includes the relevant slice of GTM Ontology: the client's structured business knowledge base of ICP, playbooks, messaging, relevant competitor context and win/loss lessons. This sprint captures qualification, identity and ownership. GTM Ontology is Traffic Architect's delivery approach, not a native Clay feature.

Acceptance checks

The receiving sales lead approves the reviewed queue and exception process. Test an ambiguous identity, duplicate signup, existing customer, open opportunity and failed handoff. Each must follow the agreed route without duplicate tasks. An operator can trace the evidence, correct and test a rule, and restore the prior version. A valid empty queue is reported honestly; no minimum lead count is promised.

Agree quality thresholds from the baseline before release. Judge the delivered workflow and review results separately from later commercial outcomes.

Proposed pilot

Use the package limits above for historical replay and the initial live test. Deliver the workflow within the agreed build sprint, then observe the released cohort for 30 calendar days. The client operates that period unless support is contracted; commercial progression may take longer.

1. Establish the baseline: signup volume, company coverage, existing qualification rules, ownership gaps and accepted opportunities. Define a sales-accepted account with the seller who receives it.
2. Join signup, workspace, CRM and product records. Preserve original identifiers and record the evidence behind company matches. Keep unresolved personal-domain identities in a review queue.
3. Separate business fit from product behavior. Use the client's actual customer criteria and relevant usage events; allow a promising enterprise signup to qualify through a different rule from a high-usage small account.
4. Apply exclusions and ownership rules. Separate customers, open opportunities, employees and duplicates from net-new acquisition. Send account expansion signals to the existing owner through their agreed process.
5. Replay a historical sample and review it with sellers. Record why candidates were accepted, rejected or held. Adjust thresholds against this evidence rather than optimizing only for the number of leads.
6. Route accepted candidates with a concise account brief, source timestamps, qualification reason and next action. Begin with reviewed handoffs before expanding automatic routing.
7. Capture acceptance, follow-up and opportunity outcomes. Keep the original cohort and rule version so later results remain interpretable.

Deliverables

The client receives an identity mapping, a documented qualification rubric, an exclusion and ownership map, a working account queue, an exception log and a baseline-to-pilot report. A named operator receives a handover covering failed joins, duplicate handling and rule changes.

The learning package adds a feedback queue, evaluation scorecard, approved change history and an operator review guide.

Discovery questions

- Which recent enterprise opportunity began as a self-serve signup, and how was it discovered?
- What valuable users does the current usage threshold miss?
- Can signup, workspace and CRM records be linked without guessing?
- Who owns an account before and after qualification, and what makes them accept it?
- Which expansion and open-opportunity records must leave the acquisition workflow?

What success means

Measure	Definition
Company match precision	Correct company assignments divided by reviewed assignments, with ambiguous matches reported separately.
Account coverage	Eligible signup accounts with sufficient identity and fit data divided by the agreed eligible cohort.
Qualification precision	Seller-reviewed candidates that meet the agreed criteria divided by all candidates reviewed.
Routing accuracy	Handoffs assigned to the correct owner without duplicate or conflicting outreach.
Sales acceptance and speed	Accepted accounts divided by routed accounts, plus time from qualification to assigned ownership.
Commercial outcome	Opportunities associated with the cohort and their progression; assess incrementality with a suitable comparison where feasible.

Measure people, workspaces and companies separately. Multiple users from one company are not automatically multiple sales opportunities. Track operating cost per accepted account, including enrichment, review and maintenance.

Decision to expand

Expand when the pilot finds a repeatable source of accepted accounts, matches identities reliably and produces follow-up the sales team can sustain. Fix the process before scaling if ambiguous matches, duplicate accounts or ignored handoffs dominate the queue.

Targets should be agreed from the baseline. A high acceptance rate created by selecting only obvious large accounts can hide poor coverage; inspect both precision and coverage. Opportunity creation may need a longer observation period than the operational pilot.

Published evidence and its limits

Clay's ElevenLabs case study describes enriching self-serve signups, assessing enterprise fit and routing promising accounts to SDRs when usage thresholds missed them. Its Figma case study combines product activity, enrichment and CRM context to identify unowned accounts.

These vendor-published examples support the workflow pattern. Their results belong to those companies and are not Traffic Architect results, forecasts or conversion guarantees. Confirm current connections, permissions and costs in the client's workspace before commitment.

Proof to show

Show a cohort replay containing accepted, rejected and unresolved accounts, the evidence behind each decision and any approved rule change. Use labelled demonstration data until a client permits use of real examples.

Self-learning with a human in the loop

Reviewed corrections and measured outcomes inform proposed improvements to this workflow. Test and approve a change before releasing it.

Learning updates rules, scoring, prompts and approved examples; it does not promise automatic model retraining or guaranteed uplift. Keep client feedback within its agreed data boundary.

What this offer learns

Decision area	Feedback captured	Approved refinement
Account qualification	Seller accepts, rejects or corrects fit, with a reason.	Refine fit criteria and examples; separate enterprise fit from product usage.
Identity and ownership	Reviewer corrects company, workspace or account owner.	Improve matching and routing rules; retain uncertain joins for review.
Handoff relevance	Seller records timing, missing context and later opportunity progress.	Adjust handoff thresholds and brief content without treating inactivity as poor fit.

Review and release

1. Name a Growth or RevOps owner and the receiving sales lead. Log record ID, source/version, decision, correction, reason, reviewer and time. Separate later outcomes from review labels.
2. Review the agreed sample during the build, covering accepted, rejected, unresolved and unselected records. Agree the client's observation cadence at handover. No response means unknown, not rejection.
3. Test a versioned change against baseline on examples withheld from tuning. Refresh evaluation samples; inspect errors, coverage and acceptance. Sparse feedback can justify no change.
4. The named owner approves a limited release. Monitor regressions and retain rollback. Preserve permissions, exclusions and human-controlled fields.

Delivery and evidence of improvement

Include a feedback queue, labelled examples, review guide, evaluation scorecard, change log and rollback procedure. Measure qualification precision, missed qualified accounts in a reviewed sample, ownership errors and review time per accepted account. Record cohort size and version; association does not prove incremental revenue.

Example learning cycle: A seller repeatedly rejects high-usage small accounts while accepting low-usage enterprise accounts. Test separate fit and usage rules against unseen signup accounts before changing production routing.

The build includes one consolidated refinement round and one documented release or keep-the-baseline decision. After handover, the client runs the agreed observation and feedback reviews. Further engineering changes or managed operation require separately agreed support and capacity.

Related offers

US visitor activation covers pre-signup activity. Paid audience quality can reflect lifecycle changes. Discovery call to CRM action follows meaningful sales conversations. See the five-offer portfolio.