

# FROM SIGNALS TO SALES

WHAT ACTUALLY HAPPENS AFTER INTENT  
DATA FIRES



JUNE 7-9, 2026, | DENVER, CO

WHO AM I

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Previously 6 years at G2.com — the world's largest B2B software review platform.



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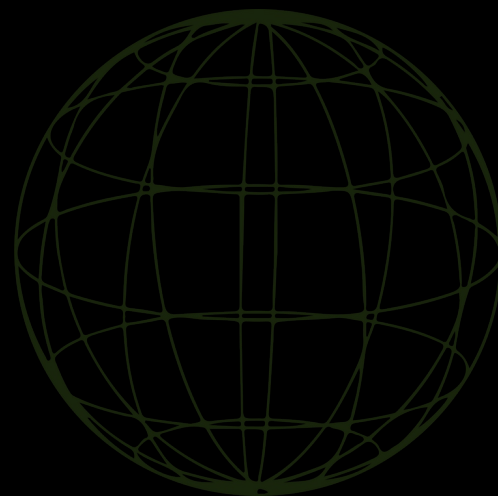
# WHO ARE YOU?



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**INTENT DATA ISN'T THE DIFFERENTIATOR  
ANYMORE.**

**EXECUTION IS.**



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# WHAT'S INSIDE

## TODAY'S ROADMAP

- 01 Opening
- 02 Foundation: intent data in 5 minutes
- 03 Not all signals are created equal
- 04 The response framework
- 05 Workflows in action
- 06 Common mistakes
- 07 Q&A

**94%**

**OF BUYERS TURN TO ONLINE RESEARCH WHEN LOOKING FOR NEW  
PARTNERS.**

~ ACQUITY GROUP



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# THE CHANNELS HAVE MULTIPLIED.

## SEARCH ENGINES

Google, Bing

## AI ANSWER ENGINES

ChatGPT, Perplexity, Gemini, Claude — the new battleground (AEO)

## CUSTOMER REVIEWS

CarrierSource, Google reviews

## EDUCATIONAL CONTENT

Blog posts, guides, whitepapers

## SOCIAL MEDIA

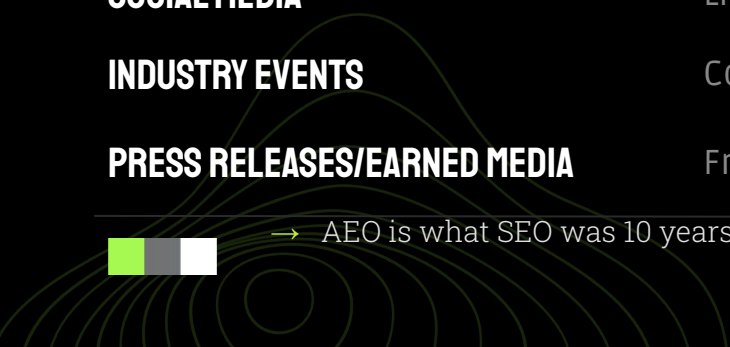
LinkedIn, YouTube

## INDUSTRY EVENTS

Conferences, webinars, podcasts

## PRESS RELEASES/EARNED MEDIA

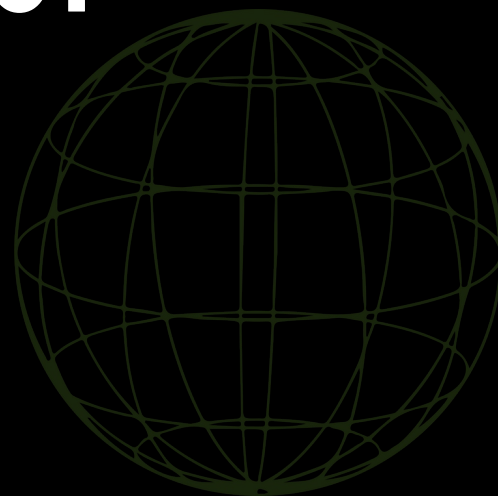
FreightWaves, Transport Topics

A decorative graphic in the bottom left corner consisting of several concentric, light green circles of varying radii. To the right of these circles is a small horizontal bar with three segments: a green segment, a grey segment, and a white segment.

→ AEO is what SEO was 10 years ago. Start paying attention now.

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INTENT DATA IS **NOT** CONTACT  
INFORMATION.



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**INTENT DATA CAPTURES “SIGNALS” THAT REVEAL WHERE A  
SHIPPER IS IN THEIR BUYING JOURNEY, WHAT THEY NEED,  
WHEN THEY NEED IT, AND WHO ELSE THEY'RE CONSIDERING.**



# THREE TYPES OF INTENT DATA.

YOU NEED A MIX. MOST TEAMS PICK ONE AND IGNORE THE REST.

## FIRST-PARTY

### YOUR OWN DATA

Collected from your website, email, social. You own it entirely.

**Ex:** Website analytics, email opens, CRM activity

## SECOND-PARTY

### PARTNER'S DATA

Another company's first-party data, shared with you. High signal, compliant.

**Ex:** CarrierSource, G2

## THIRD-PARTY

### AGGREGATED DATA

Sourced from many places. Broader but noisier. Watch privacy compliance.

**Ex:** 6sense, ZoomInfo



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**BEFORE YOU START**

# NAIL YOUR ICP FIRST.

**SIGNALS FROM THE WRONG ACCOUNTS ARE JUST NOISE.**

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- **YOUR BEST CUSTOMERS**

Who gets the most value, renews, expands, and refers others?

- **COMPANY DEMOGRAPHICS**

Industry, size, location, revenue, business model, tech stack

- **BUYING TRIGGERS**

New warehouses, new lanes, M&A, funding, regulation changes

- **BEHAVIORAL SIGNALS**

How do good-fit customers actually behave before they buy?



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# GET YOUR HOUSE IN ORDER.

- SEARCH ENGINES
- ANSWER ENGINES
- YOUR WEBSITE
- SOCIAL MEDIA
- YOUR SALES TEAM
- YOUR CONTACT DATABASE
- FIND A PROVIDER
- DEFINE YOUR GOALS
- ALIGN YOUR TEAM



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# NOT ALL SIGNALS ARE CREATED EQUAL

NAIL ONE TIER BEFORE ADDING THE NEXT

## TIER 1

"They're shopping right now"

**HOT**

In-market

Quote or contact form submitted · Your brand or competitor name searched · Service + geo search ("drayage California") · Website view

MINUTES – HOURS

## TIER 2

"They're researching the problem"

**WARM**

Problem-aware

Educational content engagement · Trigger events (new lane, new warehouse, M&A) · Comparing service types (LTL vs FTL)

DAYS

## TIER 3

"They're just browsing"

**COLD**

Awareness

Podcast or newsletter subscribes · Social follows · General industry content engagement

NURTURE SEQUENCE



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# HOT SIGNALS HAVE A **SHELF LIFE.**

RESPOND IN MINUTES — NOT DAYS

## WHAT COUNTS AS TIER 1

- Quote or contact form submitted
- Your brand name searched
- Direct competitor name searched
- Service + geography search ("drayage California")
- Multi-person visits from the same shipper
- Pricing + case study in one session

## THE DECAY

### UNDER 5 MIN

**21x MORE LIKELY TO QUALIFY**

### WITHIN 30 MIN

conversion drops sharply

### OVER 1 HOUR

effectively cold again

Source: Oldroyd / HBR

⚠ Watch out: not every site visit is hot. It's the **signal** + the **shipper** that make it Tier 1.



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# MOST OF YOUR PIPELINE **LIVES HERE.**

TREAT IT LIKE PIPELINE — NOT LIKE LEADS

## WHAT COUNTS AS TIER 2

- Downloaded a problem-specific guide or whitepaper
- Trigger event (new warehouse, new lane, M&A, funding)
- Category research (LTL vs FTL, drayage vs intermodal)
- Repeat visits to services pages over 2-4 weeks
- Webinar or podcast engagement on the topic
- Multiple stakeholders researching the topic

⚠ Watch out: a whitepaper download isn't a quote. **Marketing** works these — not sales.

## WHEN TIER 2 BECOMES TIER 1

### CLUSTER

3+ signals, same account, 2 weeks

### COMBINATION

Trigger event + any engagement

### COMMITTEE

Multiple buyers from same shipper

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TIER 3 · COLD · AWARENESS

# TIER 3 IS THE LONG GAME.

DON'T SKIP IT — DON'T LIVE IN IT

## WHAT COUNTS AS TIER 3

- Podcast listens or episode downloads
- Newsletter subscribers
- Social follows (LinkedIn, etc.)
- Liking or sharing industry content
- Conference or event attendance (no meeting)
- Downloaded a general industry report

⚠ Watch out: Tier 3 pays you back in **recognition** — not this quarter's **pipeline**.

## WHEN TIER 3 BECOMES TIER 2

### RETURN

Same person, 4+ weeks of engagement

### TOPIC

Shifts from broad to problem-specific

### SPREAD

New people from the same account



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# MASTER TIER 1.

# THEN

# EARN THE RIGHT TO TIER 2.

- Tier 1 is the highest ROI — Small volume, enormous conversion. This is where revenue gets won fastest.
- Tier 1 is the lowest complexity — One signal  $\supset$  one alert  $\supset$  one rep. Weeks to stand up, not months.
- Tier 2 & 3 compound later — Once you've nailed Tier 1, the bandwidth to invest in nurture pays real returns.



# EVERY SIGNAL HAS **THREE QUESTIONS.**

**WHO OWNS IT. HOW FAST THEY RESPOND. WHAT THEY DO.**



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# WHO, HOW FAST, WHAT — BY TIER.

|          | TIER 1 · HOT                                 | TIER 2 · WARM                              | TIER 3 · COLD                                |
|----------|----------------------------------------------|--------------------------------------------|----------------------------------------------|
| WHO      | Named sales rep<br>(within SLA)              | Marketing<br>+ light SDR touches           | Marketing<br>(brand & content)               |
| HOW FAST | 5-15 minutes<br>max 1 hour                   | Next business day<br>weekly cadence        | Monthly nurture<br>quarterly review          |
| WHAT     | Personalized 1:1<br>referencing their signal | Problem-specific sequence<br>+ retargeting | Educational content<br>retargeting, patience |

A horizontal bar with three colored squares: a bright green square on the left, a dark grey square in the middle, and a white square on the right.

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## WHO OWNS IT

# CLEAR OWNERSHIP. NO GRAY ZONES.

### TIER 1 - HOT

## SALES

Named rep or SDR. Dedicated queue. SLA tracked. If no one owns it, it's not a system.

### TIER 2 - WARM

## MARKETING

Marketing runs nurture workflows. SDR does light touch-points when promotion rules trigger.

### TIER 3 - COLD

## MARKETING

Pure marketing. Brand, content, retargeting. Sales doesn't touch these until they promote.

⚡ The handoff moments are the hardest part. When Tier 2 promotes, sales has to **already know** the account.



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## WHO OWNS IT

# SPEED BY TIER

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### TIER 1 · HOT

#### 5 MINUTES IDEAL. 1 HOUR MAX

Alerts route instantly. SDR has a dedicated hot-signal queue. SLA is tracked weekly.

### TIER 2 · WARM

#### NEXT BUSINESS DAY, WEEKLY CADENCE

Enrolled in a sequence within 24 hours. Reviewed weekly for promotion signals.

### TIER 3 · COLD

#### MONTHLY NURTURE, QUARTERLY REVIEW

Content cadence runs on a monthly rhythm. Promotion patterns reviewed quarterly.

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→ If you miss your Tier 1 SLA three weeks in a row, you have an ops problem — not a data problem.



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# THE ACTION LOOKS DIFFERENT AT EVERY TIER.

## TIER 1 - HOT

### 1:1 PERSONALIZED

- Reference the exact signal (what they searched, what they downloaded)
- LinkedIn connect + intro message
- Personal phone call within the SLA
- Relevant case study as follow-up

## TIER 2 - WARM

### SEQUENCE + RETARGET

- Auto-enroll in a problem-specific email sequence (not a brand nurture)
- LinkedIn retargeting with relevant case studies
- Watch for promotion signals (Cluster, Combination, Committee)

## TIER 3 - COLD

### EDUCATE + STAY PRESENT

- Educational content — not sales content
- Light retargeting to reinforce brand
- Track for Tier 2 promotion signals (Return, Topic, Spread)



# A REAL HOT-SIGNAL RESPONSE.

## TRIGGER

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A shipper in your ICP searches for reefer capacity going from Chicago to Seattle

## THE RESPONSE

- 5 MIN** Alert routes to named SDR for that service/lane. Notification fires on phone + Slack.
- 15 MIN** SDR sources most likely 2-3 people who conducted search, sends personalized LinkedIn connect + intro message referencing their specific service need.
- 30 MIN** Phone call. References open capacity in and expertise in exactly what was searched. Keep it magical, not creepy.
- DAY 2** Follow-up email with a case study from a similar-sized shipper in their region.
- DAY 5** Second phone attempt + voicemail. Reference the first touch.
- DAY 7** Break. Move account to retargeting + warm nurture sequence.

# A REAL WARM-SIGNAL NURTURE.

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## TRIGGER

An ICP shipper searches for “drayage” services

## THE RESPONSE

- |                  |                                                                                                            |
|------------------|------------------------------------------------------------------------------------------------------------|
| <b>DAY 0</b>     | Auto-enrolled in a 5-email sequence specific to drayage selection. First email hits inbox within 24 hours. |
| <b>DAY 2</b>     | LinkedIn retargeting begins: case studies of similar shippers + review snippets.                           |
| <b>WEEK 1</b>    | Email #2: common pitfalls in the drayage vendor selection process.                                         |
| <b>WEEKS 2-4</b> | Emails #3-5 at weekly cadence. Progressively more specific.                                                |
| <b>ONGOING</b>   | Account tagged for promotion monitoring. SDR alerted if Cluster, Combination, or Committee triggers fire.  |
| <b>WEEK 6</b>    | Review: has the account shown Tier 1 signals? If yes ↘ promote. If no ↘ move to long-term nurture.         |



# A REAL RETENTION ALERT.

## TRIGGER

An existing customer shows intent for a direct competitor — or researches a service you already provide.

## THE RESPONSE

### SAME DAY

AM gets alert. Before reacting, they review recent service history for any known issues.

### 24 HOURS

Soft check-in. Tone is curious, not defensive: "Wanted to check in — anything we could be doing better?"

### 48 HOURS

Schedule a longer meeting. Invite leadership to signal the account matters to the whole company.

### MEETING

Root-cause conversation. Listen. Do NOT pitch. The goal is to surface the real issue.

### WEEK 2

Proposal or action plan based on what you heard. Follow through visibly.

### ONGOING

Monitor for resolution signals — does intent for competitors stop? That's the measure.



# WHERE TEAMS GO WRONG.

THREE MISTAKES I SEE OVER AND OVER.



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**MISTAKE I**

# EVERY SIGNAL IS URGENT.

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**WHAT IT LOOKS LIKE**

SDRs get a dashboard with every visitor to the site, every content download, every social follow — all treated the same. They call everyone. They convert almost nobody.

**THE FIX**

Tier before you touch. Only Tier 1 goes to sales. Everything else goes to marketing — **and that's a feature, not a bug.**

**MISTAKE 2**

# SALES POUNCES ON TIER 2.

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**WHAT IT LOOKS LIKE**

A shipper downloads a whitepaper. An SDR calls them that afternoon asking if they're ready to go. The shipper hangs up. They don't come back.

**THE FIX**

Marketing nurtures the researcher. Sales engages when **promotion rules** trigger (cluster, combination, committee). **Earn the call.**

**MISTAKE 3**

# YOU ONLY COUNT WHAT CLOSES.

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**WHAT IT LOOKS LIKE**

The first month using intent data comes around. Leadership asks: is intent data working? Someone runs a report on closed-won deals tied to intent signals. The number looks underwhelming. Budget gets cut.

**THE FIX**

Measure by tier. Tier 1 = closed deals. Tier 2 = pipeline influenced. Tier 3 = brand recognition and inbound growth. Different jobs, different metrics.



TAKE THESE HOME

# THREE THINGS.

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01

## **TIER YOUR SIGNALS.**

Hot, warm, cold. The framework is the foundation for everything else.

02

## **CLEAR OWNERSHIP + CLEAR SPEED.**

Who owns each tier. How fast they respond. No gray zones.

03

## **WORKFLOWS — NOT SPREADSHEETS.**

The teams that win have a system. Start with Tier 1. Earn the right to Tier 2.

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Start Monday. Start with **one** Tier 1 signal and **one** workflow. Everything else follows from there.



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# QUESTIONS?

LET'S TALK SIGNALS, WORKFLOWS, OR ANYTHING IN BETWEEN.



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# THANK YOU.

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