

THE SIGNAL METHOD · VERSION 1.0

SIGNAL

An AI Operating System for Enterprise Pursuits

A repeatable method for researching, interpreting and pursuing complex enterprise accounts in an AI world. Not how to use a tool. How to become the most prepared seller in the room, and how AI helps you get there.

Paul Dobinson

Enterprise sales, Salesforce and AI

[PAULDOBINSON.COM](https://pauldobinson.com)

Before you begin

This is not a book about artificial intelligence. It is a book about enterprise selling, in a world where AI has quietly changed what preparation costs.

For most of my career, preparation was rationed. There were only so many hours, and the deep research, the stakeholder work, the second and third drafts went to the two or three accounts that mattered most. Everything else got the version of me that had run out of time. AI changes that maths. It does not make you a better seller. It makes it possible to bring your best preparation to every account, not just the marquee ones.

That is the whole idea behind the SIGNAL Method. It is a repeatable operating system for enterprise selling, six stages you run on every account, with AI doing the heavy, repetitive work and you doing the thinking, the judgement and the relationships that no model will ever do for you. The goal is not the most automated seller in the room. It is the most prepared one.

A note on what this is, and is not. It is a free field guide, written to be shared. It is focused on the parts of enterprise selling where AI earns its place fastest: account research, hypothesis development, engagement preparation, discovery preparation, qualification, and the continuous learning that sharpens the next account. It does not try to cover negotiation, procurement or the long middle of a complex deal; those are won by judgement this book only sharpens, not replaces. And it assumes nothing about your tools. If all you have is a free chatbot, you can start now.

How the book is built

- Part One makes the case and lays out the loop.
- Part Two builds the Foundation: your AI teammate, configured once.
- Part Three is the method itself, one part for each letter of SIGNAL.
- Part Four is how you run it week after week, and where AI should stop.

READ THIS FIRST

Nothing here asks you to put confidential, contractual or personal data into a public AI tool. Governance is covered in Part Two. If your employer has an AI policy, it takes precedence over anything in this book. When in doubt, leave it out.

Where SIGNAL came from



SIGNAL did not begin as a framework. It began as a problem.

I was working a set of complex enterprise pursuits where the amount of information available about an account, results calls, hiring pages, executive interviews, organisational change, competitive noise, was greater than any seller could realistically read, let alone hold in their head before a first meeting. Preparation was rationed by necessity. You did the deep work for the two or three accounts that mattered most, and everyone else got whatever time was left over.

I started using AI to close that gap: to research accounts properly, to connect signals that looked unrelated until you put them side by side, to build hypotheses worth testing, and to prepare for conversations the way I would have if I had unlimited hours. The objective was never automation, and it was never to generate more sales activity. It was better preparation, applied consistently, to every account rather than just the favoured few.

I refined the approach over a year of live enterprise pursuits, including work that contributed to winning a multi-million-dollar consulting engagement. I want to be precise about what that means, because it is the whole point of this book. AI did not win that account. Relationships won it. Commercial judgement won it. Discovery, run properly, won it. Execution, stakeholder by stakeholder, won it. What AI changed was the preparation underneath all of that: sharper research, hypotheses grounded in evidence rather than guesswork, and a seller who walked into every conversation knowing more than the hours in the week would normally have allowed.

That distinction matters, because most AI sales advice gets it backwards. It treats AI as a way to do more selling activity, faster. My experience was the opposite. The value was never in volume. It was in arriving at each conversation more prepared than the effort I had time to put in myself would normally allow.

SIGNAL exists to make that repeatable: for accounts that would never have earned that level of preparation before, and for sellers who do not have a research team on hand. It is not a shortcut around the things that actually win enterprise deals. It is a way of making sure preparation is never the reason you lose one.

Contents

- **Where SIGNAL Came From** *the origin story*

- **The SIGNAL Method in 60 Seconds** *the whole system, at a glance*

START HERE

- **How to Use This Guide** *read this before anything else*

- **A First Win in Fifteen Minutes** *one prompt, whatever you have*

- **Use What You Have: The Four Levels** *the progression*

PART ONE · THE CASE

- 1 The Prepared Seller Wins** *why, and the philosophy*

- 2 The SIGNAL Loop** *the operating system, in one picture*

PART TWO · THE FOUNDATION

- 3 Build Your AI Teammate** *platform, knowledge, governance, judgement*

PART THREE · THE SIGNAL LOOP

- **The Seven Outputs You Will Master** *what the loop produces*

- S Signals** *research and intelligence*

- I Interpretation** *signals create hypotheses, not pitches*

- G Ground** *grounding the AI, the hypothesis, and the ask*

- N Navigate** *multi-channel engagement*

- A Ask** *enterprise discovery and qualification*

- L Loop** *coaching and continuous improvement*

- ★ **The Method in Practice** *one account, start to finish*

- **The Method on Screen** *the pursuit, shown running*

PART FOUR · RUNNING THE SYSTEM

- 4 Cadence, Judgement and Where AI Stops** *making it a habit*

A.1– Setup, Companion, prompts and checklist
A.5

the tools that run the method

The SIGNAL Method in 60 Seconds

One Foundation. One Loop. Two Skills. Seven Outputs. One weekly rhythm. If you remember nothing else from this book, remember this page.

FOUNDATION → SIGNAL LOOP → SEVEN OUTPUTS → MONDAY MORNING DASHBOARD
→ REPEAT

ONE FOUNDATION

An AI teammate configured once: your knowledge, your standards, your governance. Built in Part Two, used in every stage after.

ONE LOOP, SIX STAGES

Signals become hypotheses (Interpret), which earn credibility (Ground), which earns engagement (Navigate), which earns discovery (Ask), which is coached honestly (Loop): each cycle sharper than the last.

TWO SKILLS

Setup: run once, builds your Permanent Knowledge.
Companion: run on every account, never asks about your business again.

WEEKLY CADENCE

Every Monday, the SIGNAL Monday Morning Dashboard tells you where to spend the week. New accounts get Signals and Interpret. Active pursuits get Navigate and Ask. Top deals get an honest Loop review.

Seven outputs, mastered once, used on every account

SIGNAL Research Brief

The account, graded

SIGNAL Deal Coach

An honest qualification

SIGNAL Leading Hypothesis

The problem, not the pitch

SIGNAL Account Plan

The multi-thread strategy

SIGNAL Outreach Planner

A campaign, not a message

SIGNAL Monday Morning Dashboard

Where to spend the week

SIGNAL Discovery Brief

The signature one-pager

THE ONE HABIT UNDERNEATH ALL OF IT

The AI prepares. You interrogate, verify and decide. AI has dramatically reduced the cost of preparation. Preparation improves judgement. Judgement wins enterprise sales. The goal is not the most automated seller in the room. It is the most prepared one.

How to use this guide

Do not read this end to end and file it away. That is the fastest way to get nothing from it.

Before you go further, pick one real account you are currently working, or about to start. A live one, not a hypothetical. As you move through the SIGNAL Loop in the chapters ahead, run that account through each stage as you read: pull its signals, form a hypothesis, ground your engagement, plan how you would navigate to the right people, prepare the discovery questions, and be honest with yourself in the loop review.

The point of this guide is behavioural change, not theoretical understanding. You will know SIGNAL has worked when your weekly routine has changed, not when you can recite the six stages.

THE ONLY RULE THAT MATTERS HERE

Read with the account open in another tab. Everything in this book is written to be run, not admired.

A first win in fifteen minutes

You do not need a paid tool, a perfect setup, or the rest of this guide to get value today. You need a real account, whatever information you already have, and one prompt. Start here, get a result, then come back and make it repeatable.

- 1 **Open ChatGPT or Claude.** The free version is fine. This works with what you have.
- 2 **Gather two things about yourself:** your company's website "About" text or a short description of what you sell, and your first-call deck or key talking points if you have one. Copy the relevant sections. This is what grounds the prompt in your actual business rather than generic selling.
- 3 **Pick a real account you are preparing for,** and gather what you already have: their website "about" text, the prospect's LinkedIn summary, one recent news item. Missing pieces are fine.
- 4 **Paste the prompt on the next page,** filling in your own context and the account material. Read the output, keep what is useful, and verify anything before you act on it.

THE QUICK START PROMPT · COPY, PASTE, FILL THE BRACKETS

You are helping me, an enterprise seller, prepare for an account.
Do not invent facts.

About me and what I sell:

[Paste your company "About" text, your key services, and your main differentiator. A paragraph from your website is enough. First call deck talking points work well here too.]

What I have on [ACCOUNT / PROSPECT]:

[Paste their website "about" text, the prospect's LinkedIn summary, one recent news item. Whatever you have. Some gaps are fine.]

Do four things:

1. Based on what I sell, summarise what matters most about this account for me specifically. Separate what you can see from what you are inferring.
2. Give me three hypotheses about their priorities, framed as their problem or opportunity, NOT as a pitch for any product.
3. Draft one short outreach message, under 100 words, one clear ask, built on the hypothesis most relevant to what I sell, in a plain and senior tone.
4. Add a short "Why this works" note explaining your key choices, including why you connected this account to my specific offering.

If something important is missing, tell me and say how confident you are. Do not state anything I cannot verify as fact.

WHAT JUST HAPPENED

That prompt is the whole SIGNAL method in miniature: research, hypotheses instead of pitches, outreach in your voice, and an explanation so you learn while you work. The rest of this guide turns that one-off result into something repeatable, consistent and built around your business.

The four levels

This method scales down as well as up. It works with a free chatbot and nothing else, and it gets sharper as you add tools you already have. You never need to skip ahead. Each level compounds on the last.



Level	What you use	What you get
0	A free chatbot and the Quick Start prompt	Fast, decent preparation on any account, today
1	A Project with a short instruction and a few knowledge documents	Consistency, and far less prompting each time
2	The Setup Skill and the Companion Skill	Guided workflows, honest coaching, and teaching as you work
3	Whatever data sources you already have, added in	Sharper signals and stronger hypotheses

THE POINT

Most guides assume you have the full stack. This one does not. Begin at Level 0 with the prompt you just ran. Move up only when it earns its place. The method is the same at every level; the difference is how much of it you have automated.

The Prepared Seller Wins

THE ARGUMENT OF THIS BOOK, IN ONE PAGE

Enterprise deals are won in preparation and lost in assumption. AI has collapsed the cost of preparation. The seller who uses that to arrive better prepared, not more automated, has a durable advantage. SIGNAL is how you do it repeatably.

I have sat on both sides of enough enterprise deals to know that the outcome is usually decided before anyone gets in the room. The seller who understood the account, framed the problem the buyer recognised, and reached the right people in the right order was almost always going to win. Preparation was the moat.

What actually changed

The moat is still preparation. What changed is its price. Deep account research, a proper stakeholder map, a business case grounded in the customer's own words: this used to take hours you did not have across forty accounts, so you rationed it. AI has taken the cost of that groundwork close to zero. The advantage no longer goes to the seller with the most time. It goes to the seller with the best method for turning cheap preparation into sharp judgement.

FROM THE FIELD

“Success in the larger sale depends, more than anything else, on how the Investigating stage of the call is handled.”

Neil Rackham, SPIN Selling

Rackham's team analysed 35,000 sales calls across 12 years to find out what separated top performers from the rest. The answer was not technique, charisma or closing skill. It was the quality of investigation before the pitch. The best sellers arrived knowing more, asking sharper questions and wasting less of the buyer's time. The tools have changed. The principle has not.

The best enterprise seller I ever worked alongside was not the smoothest talker in the team. He was the one who walked into every first meeting already knowing the customer's last three earnings calls, the new hire in the function we sold to, and the initiative that made our timing right. Buyers thought he was psychic. He was just prepared. AI would have made him unstoppable.

The trap: automation instead of preparation

The obvious mistake, and the one most AI sales advice walks straight into, is to point this new capacity at doing more, faster. More emails, more sequences, more automated touches. That produces a more efficient version of the behaviour buyers already ignore. Volume was never the constraint. Relevance was. AI is far more valuable pointed at understanding than at output.

The winner is not the most automated seller in the room. It is the most prepared one.

What stays human

Be clear about the division of labour, because it runs through every page that follows. AI is very good at reading, structuring, summarising, drafting and generating options. It is poor at, and should never be trusted with, judgement about people, timing, politics, risk and trust. Those are the parts that decide enterprise deals, and they remain entirely yours.

AI DOES THE GROUNDWORK

- Reads and structures research
- Turns signals into options
- Drafts and repurposes
- Challenges your thinking

YOU DO THE SELLING

- Judge people and timing
- Decide what is real
- Build trust and credibility
- Own the relationship

THE BEHAVIOURAL ANGLE

Buyers do not make decisions on information alone. They decide under cognitive load, on incomplete data, influenced by trust, status and the fear of a wrong choice. This is why a more informed seller does not automatically win, and why behavioural science runs through this whole method. Preparation only pays off if it changes how the buyer feels, not just what they know.

THE PHILOSOPHY, STATED ONCE

AI does not replace enterprise sellers. It removes repetitive work so that judgement, curiosity, credibility and relationships, the things that actually differentiate you, get more of your time, not less. Every recommendation in this book is measured against that. If a use of AI makes you more automated but less prepared, it does not belong here.

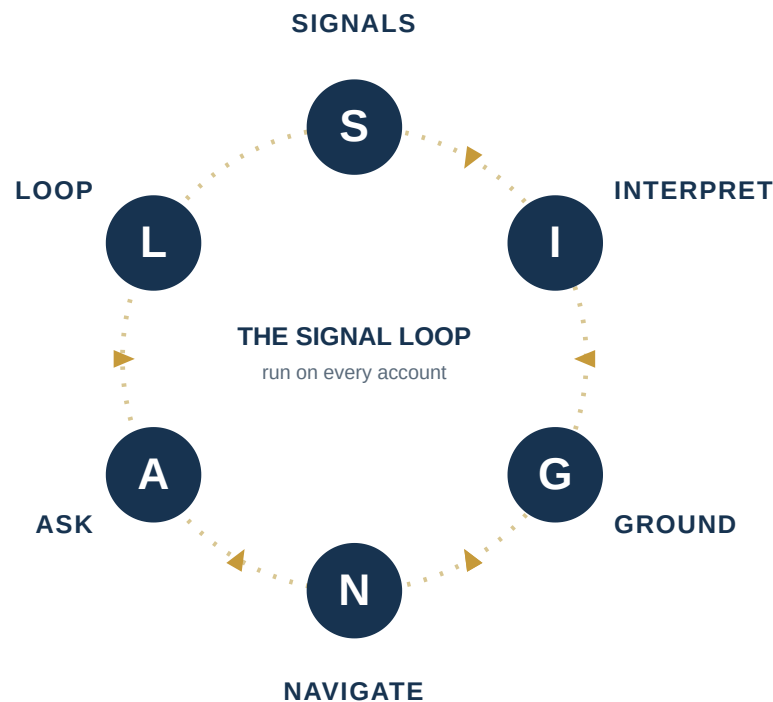
The SIGNAL Loop

WHAT THIS CHAPTER GIVES YOU

The whole operating system in one picture, so that every chapter afterwards has a place to hang. Six stages you run on every account, sitting on one foundation, governed by three things that never switch off.

A method you cannot draw is a method you will not remember. Here is the entire system on one page. Everything else in this book is a deeper look at one part of it.

One Foundation. Six stages. Three things that never switch off. If you can draw this circle from memory, you know the method.



Reading the loop

You enter at Signals and move clockwise, and the important thing is that nothing stands alone. Signals become hypotheses. Hypotheses shape the credibility you build. Credibility earns engagement. Engagement leads to discovery. Discovery creates the coaching that sharpens the next cycle. Each stage is the raw material for the one after it, which is why SIGNAL is an operating system, not six separate techniques. It is a loop, not a funnel, because enterprise accounts are worked continuously, not processed once.

Stage	What you do	What AI does
S Signals	Gather intelligence on the account	Reads and structures the research fast
I Interpret	Turn signals into hypotheses	Generates options, flags evidence gaps
G Ground	Build credibility and presence	Helps you stay consistent and relevant
N Navigate	Engage across channels and people	Coordinates campaigns, drafts in your voice
A Ask	Run discovery and qualify honestly	Prepares, then coaches and stress tests
L Loop	Review, learn, improve	Coaches the deal, captures the lesson

What sits underneath, and what never switches off

The loop runs on one Foundation: an AI teammate you configure once, with your knowledge, your standards and your governance built in. That is Part Two. And three things run through every single stage and never switch off. Hold these in mind from here on.

- **Judgement.** The rule underneath every stage: the AI prepares, you interrogate, verify and decide. In practice that means testing the AI's reasoning, checking anything before you act on it, and owning what it means commercially. AI improves your thinking; it does not do it for you.
- **Behavioural science.** Buyers decide as humans under pressure. Every stage is shaped by how people actually make decisions, not how we wish they would.
- **Credibility.** Trust is earned by humans. AI can help you show up consistently, but it can never manufacture the thing that makes a buyer take your call.

HOW TO USE PART THREE

Each stage chapter follows the same shape: the principle, the AI's role and the human's role, the behavioural science, a Monday Morning run that walks a real scenario minute by minute, an example ladder showing poor, good and excellent output, and a build exercise. Read them in order the first time to understand the full method. After that, jump to whichever stage the account in front of you needs.

On the build exercises: they are not asking you to act right now. They show you what you will do once your Foundation is live. Read first, understand the method, then return to each exercise when you are ready to run it on a real account.

☐

You can draw the six stages of the loop from memory.

☐

You can name the one Foundation and the three things that never switch off.

☐

You have one real account in mind to run through the loop as you read.

Build Your AI Teammate

WHAT YOU WILL BUILD

Layer 0 of the operating system: an AI teammate configured once with your knowledge, your standards and your governance, so that every stage of the loop runs on the same reliable engine. Configure it now; use it everywhere after.

Before you run the loop you need something to run it on. Not a chat window you re-explain yourself to every morning, but a configured teammate that already knows your business and holds itself to your standards. This is the one part of the book you do once.

Pick a platform and a project

Use one of the two platforms with a proper project structure: ChatGPT Projects or Claude Projects. A project keeps custom instructions and uploaded knowledge attached to every conversation, which is the whole point. Everything in this book works in either. Choose on feel and, far more importantly, on data terms.

GOVERNANCE COMES FIRST

Use a paid tier with clear commitments on training and retention, and confirm your employer permits it before you upload anything. Free consumer tiers may use your inputs to improve the models. This decision outranks every feature. If your company has an approved enterprise instance, use that.

Give it an identity

Configure the teammate as a role with standards, not a search box with a personality. A strong identity answers four questions: who it is, what it does, what it never does, and how it carries itself. The Setup Skill in Appendix A.2 builds this for you through conversation.

THE IDENTITY, IN SHORT

Who. A senior sales research analyst and deal coach supporting an enterprise seller. **What.** Research, hypotheses, engagement drafts, discovery prep, and honest deal coaching. **Never.** Makes commercial decisions, invents facts, or writes final client comms without review. **How.** Concise, commercial, direct; separates what it knows from what it is guessing; would rather ask a sharp question than fill a gap.

Think of it as a capable junior analyst, not an oracle. Good junior analysts make mistakes, welcome being challenged, and get sharper the more precisely you brief them. Treat yours the same way, and scepticism stops being a limitation of the tool and becomes a feature of how you use it. The rule to configure it against is the same rule that runs through this whole book: the AI prepares, you interrogate, verify and decide.

Feed it your knowledge

Upload the material that turns a generic model into your teammate: public website and product content, public case studies, your ICP, buyer personas, value proposition and messaging, your discovery methodology, and competitive positioning. Curate, do not dump. A tidy one page summary beats a forty slide deck. And upload only what is public or unambiguously yours to use.

WHERE AI STOPS

Confidential proposals, pricing, NDA material, internal strategy, personal data and CRM exports never go in. When you want help on a real, sensitive deal, abstract it: strip the identifying detail and describe the shape of the situation. The teammate reasons about patterns perfectly well without the particulars.

BUILD MOMENT · BUILD YOUR KNOWLEDGE BASE IN ONE CONVERSATION

Do not fill in a form. Open your AI, run the SIGNAL Setup Skill (Appendix A.2), and let it do the heavy lifting. It works best when you feed it real material, so before you start, have these ready: your website URL, an external-facing pitch or capability deck you can upload, and any public one-pagers or case studies.

The Setup Skill then reads your material, searches for your company where it can, drafts a first version, interviews you only to fill the gaps, and shows you everything it assumed so you can confirm or correct before anything is saved. The result is your Permanent Knowledge document, built from your real assets rather than from memory.

START WITH WHAT YOU HAVE

If you have no deck to upload and no web search on your plan, the Setup Skill falls back to interviewing you directly. You still get a complete document. Adding assets and search simply makes it faster and sharper. And you can rerun it any time your positioning changes; each version is a permanent improvement to everything the teammate produces afterwards.

VALIDATE BEFORE YOU SAVE

When the AI reads your website or searches the web, it will occasionally infer something wrong or repeat an outdated claim. The Setup Skill forces a validation step where it shows you every assumption before writing your knowledge document. Confirm or correct each one. Never let an unchecked assumption become permanent knowledge.

Teach it to think, and to coach

This is what separates a teammate you trust from a confident guesser. Build these standards into the Project Instructions, then test each one. They are the difference between output you can act on and output you have to check line by line.

- 1 **Separate evidence from inference**, and label the inferences.
- 2 **Never invent**. If it does not have the information, it says so and asks.
- 3 **Challenge my thinking**, including when my logic is thin or my plan has a hole.
- 4 **Name what is missing**: the stakeholder, the criterion, the competitor.
- 5 **Offer two or three hypotheses**, not one confident guess.
- 6 **State confidence honestly**, from well supported to guess.
- 7 **Think commercially**, always ending with what it means for the deal.
- 8 **Coach, do not flatter**. Act like a sceptical sales manager, not a copywriter.

FROM THE FIELD

Every seller I have coached wanted a tool that made them look good. The ones who improved wanted a tool that told them the truth. The eighth standard is the one that matters most. A teammate that agrees with you is just a faster way to be wrong.

Knowledge and workflow are two different things

Keep this distinction clear, because it explains why the teammate works. Knowledge answers “what does my AI know?” It is your company, services, ICP, messaging, competitors and case studies. Workflow answers “how does my AI think?” It is the research, discovery, qualification and coaching it runs. You need both. Knowledge without workflow is a filing cabinet. Workflow without knowledge is a clever stranger. Together they are a teammate.

Getting good output

You do not need to be an AI expert, but a little literacy pays off immediately. The durable principles hold on any platform, this year and next.

- **Feed it, do not quiz it**. Paste the source material. A grounded teammate beats one working from memory, which is where invention starts.
- **Iterate, do not accept**. The first answer is a draft. “Sharper,” “shorter,” “now challenge that” gets you the real value.
- **Know what good looks like**. Good output separates evidence from inference, states its confidence, and ends with what it means commercially. Weak output is confident, generic and unsourced.
- **Fix the source, not the symptom**. When it is repeatedly wrong, the fix is almost always in the instructions or the knowledge, not the next prompt.
- **Assume it can be confidently wrong**. These models invent facts that look entirely plausible: names, titles, dates, figures, quotes. Fluency is not accuracy. Check anything you intend to say to a customer against the real source. This is the single most important habit on this page.

PLATFORM SPECIFICS

The exact clicks in ChatGPT and Claude change every few months, so this book stays principle led. The step-by-step, screenshot-level walkthroughs are best learned from real use, which is exactly what the month ahead is for. Build the habit now; the buttons will follow.

Worksheet 3.1 · Foundation build confirmation

Do not start the loop until every line is ticked.

- ☐ Platform chosen and its data terms confirmed.
- ☐ Employer AI policy checked and complied with.
- ☐ Project created; Companion Skill from Appendix A.3 pasted as custom instructions.
- ☐ Cleared knowledge uploaded; nothing confidential included.
- ☐ All eight reasoning standards tested, including at least one where the teammate challenged you.

What to do right now

You now have the Foundation concept. The next step is to load both skills into your Project. They live in the Appendix of this workbook as copy-paste ready blocks.

- ☐ Go to Appendix A.2. Paste the Setup Skill into a new chat and run it. It will interview you and produce your complete Permanent Knowledge document in one conversation.
- ☐ Once the Setup Skill is done, go to Appendix A.3. Paste the Companion Skill into your Project as the custom instructions. This is the skill you use on every account from here on.
- ☐ Type **start**. The method begins.

The seven outputs you will master

The loop is the method. These seven outputs are what it produces. Learn to generate these well, on any account, and you have the whole system in your hands. Everything in Part Three builds towards them.

To keep this concrete, the stages that follow return to one fictional pursuit: a consultancy called Meridian chasing a mid-sized insurer, Coastline Mutual. You will meet them in fragments here, then see the whole pursuit run end to end in The Method in Practice. The account is invented; the shape of the work is not.

Output	What it is	Stage
SIGNAL Research Brief	A structured picture of the account and its signals	Signals
SIGNAL Outreach Planner	What to lead with, and a coordinated way to engage	Interpret, Navigate
SIGNAL Discovery Brief	One page of meeting preparation. The signature output	Ask
SIGNAL Deal Coach	An honest review against your qualification framework	Loop
SIGNAL Social Selling Coach	Sharper profile, content, commenting and outreach	Ground
SIGNAL Account Plan	The strategic layer for one account over time: footprint, whitespace and sequenced plays	Synthesis
SIGNAL Monday Morning Dashboard	Where to spend your time this week	Loop

SEVEN, AND NO MORE THAN YOU NEED

You could build dozens of workflows. Do not. These seven, produced consistently and well, cover the work that actually moves enterprise deals, from single-account intelligence through to the strategic plan and the weekly rhythm. Master these before you add anything, and most weeks you will never need more.

A NOTE ON THE SIGNAL ACCOUNT PLAN

The SIGNAL Account Plan is a build-to-format output, and formatting matters when it goes to your manager or a QBR. At the time of writing, Claude tends to handle design and building to a house style more reliably than ChatGPT, so it is the better choice when you want the plan to match a template. The Companion Skill will offer to accept your template and build the plan to it.

S

THE SIGNAL LOOP · STAGE 1 OF 6

Signals

Research and intelligence

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THE PRINCIPLE

Read the whole account as a set of signals. You are not gathering facts to recite. You are gathering evidence to reason from.

Enterprise sellers prepare, and preparation starts with intelligence. This is where AI earns its place fastest, because it will read more, faster, than you ever could. Your job is not to read less. It is to point a tireless research analyst at the right sources and ask it the right questions.

RUNNING EXAMPLE · MERIDIAN AND COASTLINE

When Meridian pointed its teammate at Coastline Mutual, the useful signal was not any single fact. It was the overlap: a new Chief Customer Officer, active hiring for data engineers, and “fragmented member data” mentioned on the results call. One of those is noise. Together they are a pattern.

THE AI'S ROLE

- Read and structure large volumes of public information
- Extract signals from noise
- Summarise into a usable profile
- Flag what is uncertain or out of date

YOUR ROLE

- Choose the account and the sources
- Judge what matters commercially
- Verify anything you will act on
- Decide what the intelligence means

Where to look

Direct your teammate across the full public estate of an account. No single source tells the story; the signal is usually in the overlap.

Source	What it reveals
Company website and product pages	How they describe themselves and their priorities
LinkedIn (company and people)	Structure, hiring, who is new, what leaders post
ZoomInfo and Apollo	Org data, contacts, technologies, intent signals
Annual reports and investor presentations	Stated strategy, in their own words
Public financial results and earnings calls	Pressure, priorities, what leadership is measured on
Hiring activity	Where they are investing before they announce it
Executive interviews and news	Priorities, language, recent change
Technology stack and partner ecosystem	What they run, who they work with, where you fit

What to extract

Ask specifically for the signals that matter in enterprise selling, not a generic summary. A good intelligence pass surfaces trigger events, buying signals, strategic initiatives, risks, competitive threats, executive priorities and probable business challenges. The next stage turns these into hypotheses, so gather them cleanly here.

THE BEHAVIOURAL ANGLE

Curiosity is a discipline, not a mood. The best researchers keep asking “and what would that mean?” one level further than feels necessary. Instruct your teammate to do the same: for every signal, ask what it implies and what would confirm it. This is how you avoid the confirmation bias of only noticing signals that suit the pitch you already wanted to make.

MONDAY MORNING

A new enterprise account lands in my territory

0-5 min	Frame it. Open the Foundation project. Tell the teammate the account name, sector, and that you are running a Signals pass. Ask it what public sources it would prioritise for this type of company.
5-20 min	Feed it. Paste in the latest results summary, the “about” and strategy pages, two recent executive interviews, and the LinkedIn snapshots of the function you sell into. Ask it to structure everything into an account profile.
20-30 min	Extract signals. Ask for trigger events, strategic initiatives, likely pressures, competitive threats and executive priorities, each labelled by how well the source supports it.
30-40 min	Interrogate. Push back. “What are you inferring rather than reading? What would you want to verify before I act on it?” Note the gaps to close yourself.
40-45 min	Bank it. Save the profile in the project. You now know more about this account before your first coffee than most sellers will before their first meeting.

EXAMPLE LADDER · THE INTELLIGENCE REQUEST

POOR

“Tell me about Acme Corporation.”

Invites a generic, possibly invented summary with no commercial edge.

GOOD

“Summarise Acme’s strategy and recent priorities from the material I have pasted.”

Grounded in real sources, but stops at description rather than signals.

EXCELLENT

“From the pasted sources, extract Acme’s trigger events, strategic initiatives and likely pressures. Label each by evidence strength, and flag anything you are inferring rather than reading.”

Grounded, signal focused, and honest about confidence. Ready to reason from.

WHERE AI STOPS

Do not act on a fact you have not verified, and never repeat an AI generated “insight” to a customer without checking the source. A confident invention repeated in a meeting costs you the credibility this whole method is built on. The teammate gathers; you confirm.

When you build · Stage S: your first Signals pass

Once your Foundation is live, return here. Run a Signals pass on a real account and capture the three signals you would stake a hypothesis on. Do not complete this now; read the full method first.

Signal 1, and the source that supports it

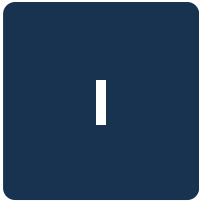
Signal 2, and the source

Signal 3, and the source

One thing I must verify myself before acting

CARRY INTO THE NEXT STAGE

You have now produced a SIGNAL Research Brief. Next you will test whether those signals actually support a commercial hypothesis, which is the distinction most sellers get wrong.



THE SIGNAL LOOP · STAGE 2 OF 6

Interpretation

Signals create hypotheses, not pitches



THE PRINCIPLE

A signal is not a reason to pitch. It is a reason to form a hypothesis. Get this one distinction right and you will already sell better than most of the market.

Here is the mistake that defines mediocre enterprise selling. A seller spots a signal, a new CTO, a funding round, a regulatory change, and immediately turns it into a pitch. “I saw you appointed a new CTO, our platform would be perfect.” The signal was real. The leap was lazy. And the buyer can feel the difference.

From signal to hypothesis

A hypothesis is a testable belief about the customer's world, held loosely until evidence confirms it. It does not assume you are the answer. It asks a better question. The same new CTO signal becomes: “A new CTO often means a technology review in the first two quarters. If that is happening here, they may be reassessing platforms and integration risk. That is worth testing before assuming anything about fit.”

Signals create hypotheses, not pitches. The pitch, if it is ever justified, is earned much later.

RUNNING EXAMPLE · MERIDIAN AND COASTLINE

Meridian's three Coastline signals did not become “you need a customer data platform.” They became a hypothesis in the buyer's language: the member-experience programme depends on consolidating fragmented data, and the new CCO owns that outcome without yet owning the data. Same signals, but now a problem worth a conversation rather than a product worth deleting.

THE AI'S ROLE

- Generate multiple hypotheses from a signal
- Argue for and against each one
- Suggest what would confirm or kill it
- Resist jumping to your solution

YOUR ROLE

- Judge which hypotheses are plausible
- Prioritise by evidence and relevance
- Decide which to test, and how
- Hold them loosely

THE BEHAVIOURAL ANGLE

Framing decides everything here. A hypothesis framed around the customer's risk or opportunity earns a conversation; the same insight framed as your product earns a delete. Loss aversion is relevant too: buyers move faster to protect against a credible threat than to chase an abstract gain. The interpretation you take forward should be framed in the buyer's terms, not yours.

FROM THE FIELD

I once watched a competitor win an account we had researched better, because we led with our solution and they led with a hypothesis about the customer's real problem. Same facts. They sounded like they understood the business. We sounded like we wanted a deal. The buyer told me afterwards it was not close.

MONDAY MORNING

Turning the weekend's signals into a plan

0-10 min	Load the signals. Bring the three signals from your Stage S pass to the teammate. Ask for two or three hypotheses per signal, each framed as the customer's problem or opportunity, not your product.
10-20 min	Stress test. For each hypothesis ask: what would make this true, what would make it false, and how confident are you? Kill the weak ones now.
20-30 min	Prioritise. Choose the one or two hypotheses worth building a conversation around. These become the spine of everything from here to discovery.
30-35 min	Bank it. Write the chosen hypotheses in the buyer's language. You now have a reason to reach out that is about them, not you.

EXAMPLE LADDER · FROM THE SAME SIGNAL

POOR (A PITCH)

“You have a new CTO, so you need our platform. Can we book a demo?”

Assumes the answer, ignores the buyer's world, invites a no.

GOOD (AN OBSERVATION)

“New CTOs often review the tech stack. Thought it might be timely to connect.”

Relevant, but vague, and still faintly about wanting a meeting.

EXCELLENT (A HYPOTHESIS)

“A leadership change in engineering often puts integration risk and platform consolidation on the agenda. If that is on your mind, I have seen how peers in your sector handled it, happy to share what worked and what did not.”

Frames the buyer's likely problem, offers value, earns the conversation.

WHERE AI STOPS

The teammate can generate ten plausible hypotheses in seconds. It cannot know which one is true for this buyer, this quarter. That judgement is yours, and it only gets confirmed in discovery. Do not let a well written hypothesis harden into a conviction before the customer has said a word.

When you build · Stage I: convert your signals

Return here once you have run Stage S on a real account. Take the strongest signal and turn it into a hypothesis in the buyer's language.

The signal

The hypothesis, framed as their problem or opportunity

What would confirm it

What would kill it

CARRY INTO THE NEXT STAGE

You have now formed a SIGNAL Leading Hypothesis. Next, that hypothesis needs credibility behind it, because a good idea delivered cold is still cold.

G

THE SIGNAL LOOP · STAGE 3 OF 6

Ground

Grounding the AI, the hypothesis, and the ask

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THE PRINCIPLE

Ground has three meanings, and this method needs all three: ground the AI in context you trust, ground every hypothesis in evidence, and ground your engagement in something genuinely relevant to the buyer. Skip any one of them and the others weaken.

Ground is the widest word in this method, and it is worth being precise about why. It borrows directly from a term in AI itself: grounding, the practice of feeding a model real, trusted context instead of letting it reason from memory alone. That idea runs through this book in three layers, and this chapter is where they meet.

First, you ground the AI. Everything in Part Two, the knowledge you upload, the validation step before anything is saved, exists so your teammate reasons from your real business rather than a plausible guess.

Second, you ground the hypothesis. Every confidence rating and every evidence tag you saw in Interpret is grounding in practice: a belief about the customer is only worth carrying forward once it is tied to something real, not a hunch dressed up as insight.

Third, and where this chapter spends most of its time, you ground the engagement. This is the stage most sales methods ignore, and it reflects a conviction I have held my whole career: people buy from people they recognise. Build credibility and familiarity before you ever ask for anything, so that when you do reach out, you are already a known quantity.

RUNNING EXAMPLE · MERIDIAN AND COASTLINE

Before Meridian's seller ever sent a message, they spent several weeks commenting on the Coastline CCO's posts about member trust and digital experience, adding a genuine point of view each time, never a pitch. By the time outreach began, the name was already faintly familiar. That familiarity was earned in Ground, long before it was spent in Navigate.

The principles of grounding the ask

- People buy from people they recognise. Recognition lowers the buyer's guard before you say a word.
- Visibility creates familiarity, and familiarity creates trust. Showing up consistently is the mechanism.
- Consistency beats virality. One thoughtful post a week for a year beats one viral post you cannot repeat.
- Teach more than you pitch. Give the market something useful and it starts to see you as an authority rather than a vendor.

- Comment intelligently. A sharp comment on a prospect's post does more than a cold message ever will.
- Build credibility before you ask for the meeting. The ask lands differently when you are already known.

THE AI'S ROLE

- Generate content ideas from your expertise
- Research prospects before you engage
- Prepare thoughtful comment angles
- Draft and repurpose articles
- Refine tone to sound like you

YOUR ROLE

- Bring the real experience and opinion
- Choose what is worth saying
- Show up consistently
- Build the actual relationships
- Be authentic; that part cannot be delegated

THE BEHAVIOURAL ANGLE

Two forces are at work. The mere exposure effect means people trust what is familiar, so repeated, low pressure visibility quietly warms a buyer long before any pitch. Authority means that when you consistently teach something useful, the market grants you standing. Both take time and repetition, which is exactly why consistency matters more than any single brilliant post.

FROM THE FIELD

More than once a buyer has opened a first meeting with “I have been reading your posts.” That sentence is worth more than any opener I could have written. It means the relationship started months before the meeting, without a single cold message. That is what grounding buys you.

MONDAY MORNING

A fifteen minute grounding routine, done weekly

0-5 min	Research. Ask the teammate to surface what your target accounts and their leaders have posted or announced recently, and where an intelligent comment would be welcome.
5-10 min	Contribute. Ask for two or three genuine comment angles that add a point of view, not flattery. You choose, edit into your own words, and post them yourself.
10-15 min	Teach. Ask it to turn one thing you learned this week into a short post idea. You add the real experience and publish. Repeat weekly. Familiarity compounds.

EXAMPLE LADDER · COMMENTING ON A PROSPECT'S POST

POOR

"Great post! Totally agree."

Adds nothing, signals nothing, forgotten instantly.

GOOD

"Really useful point on integration risk. We see this a lot too."

Relevant and human, but still generic and faintly self-referential.

EXCELLENT

"The point about phased rollouts resonates. The teams I have seen succeed treated the first phase as a credibility exercise rather than a delivery milestone, which changed who they involved. Curious whether you are seeing the same."

Adds a genuine insight, invites a reply, builds standing. No pitch.

WHERE AI STOPS

Never automate authenticity. Auto-generated comments, bulk-scheduled generic posts and bot-like engagement are worse than silence; they actively erode the credibility you are trying to build. AI helps you find the idea and refine the words. You must mean them, and you must show up as yourself. The moment it sounds automated, grounding turns into its opposite.

When you build · Stage G: start your grounding routine

Return here when your Foundation is ready. Commit to a cadence you can actually sustain. Consistency beats ambition here.

My weekly grounding slot (day and time)

One topic I can teach on credibly, drawn from real experience

Three people whose posts I will engage with intelligently this week

CARRY INTO THE NEXT STAGE

You have now built the visibility a SIGNAL Social Selling Coach review would recognise. Next, that credibility gets spent: it is what makes the outreach land instead of getting ignored.

N

THE SIGNAL LOOP · STAGE 4 OF 6

Navigate

Multi-channel engagement

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THE PRINCIPLE

Do not send messages. Run campaigns. Coordinated engagement across channels and stakeholders, each touch reinforcing the last, is what breaks through in enterprise accounts.

A single email is a coin toss. A coordinated sequence across the right channels, aimed at the right people, built on a real hypothesis and backed by the credibility you built in Ground, is a campaign. Enterprise deals are not won by one perfect message. They are won by showing up, relevantly, in more than one place, over time.

RUNNING EXAMPLE · MERIDIAN AND COASTLINE

Meridian's sequence to the Coastline CCO ran three touches over two weeks: an opening observation with no ask, a peer comparison to build urgency, then a direct, low-friction request for twenty minutes. Each touch carried a different hypothesis. None of them mentioned a product.

The channels, working together

Each channel does something the others cannot. The art is in the reinforcement, not any single touch.

Channel	What it is good for
LinkedIn	Familiarity, social proof, a warm first touch
Email	Substance, a clear hypothesis, something to forward
Phone	The human moment that text cannot replicate
Voice notes	Warmth and personality at low effort for the recipient
Video	Standing out, and showing you took the time
Commenting	Low-pressure presence that warms the ground
Follow-up	Where most sellers quit and most deals are actually made

THE AI'S ROLE

- Design a multi-touch, multi-channel sequence
- Draft each touch in your voice, tuned to the channel
- Keep the hypothesis consistent across touches
- Suggest timing and reinforcement

YOUR ROLE

- Judge who to engage and in what order
- Make the calls and record the notes
- Read the responses and adapt
- Know when to stop

THE BEHAVIOURAL ANGLE

Reduce cognitive load and you increase response. Every touch should make it easy to say yes: one clear ask, low friction, obvious relevance. Reciprocity matters too; leading with something useful, an insight or an introduction, makes a buyer more inclined to respond than an outright request. And consistency across channels builds the quiet sense that you are simply present in their world, which is exactly the impression you want.

MONDAY MORNING

Designing a campaign for one target stakeholder

0-10 min	Brief the campaign. Give the teammate the stakeholder, the hypothesis from Stage I, and the credibility you have built. Ask for a two to three week, multi-channel sequence, not a single email.
10-20 min	Draft the touches. A LinkedIn engagement, a substantive email built on the hypothesis, a call plan, and a follow-up. Each in your voice, each reinforcing the same idea.
20-25 min	Sequence it. Ask for timing and the logic of reinforcement, so no touch feels random or repetitive.
25-30 min	Own it. Edit everything into your own words, schedule your part, and make the calls yourself. The campaign is planned; the relationship is yours to run.

EXAMPLE LADDER · REACHING A SENIOR STAKEHOLDER

POOR

“One email: Would love 15 minutes to show you our platform.”

One channel, no hypothesis, all about the seller. Ignored.

GOOD

“A relevant email built on a real hypothesis, then a follow-up a week later.”

Better substance and persistence, but single-channel and easy to miss.

EXCELLENT

“A thoughtful comment on their post, then a short email with a sector-specific insight, then a brief call referencing both, then a follow-up sharing something genuinely useful.”

Coordinated, reinforcing, buyer-focused, and grounded in prior familiarity. Hard to ignore.

WHERE AI STOPS

AI can design and draft the campaign. It must not run it on autopilot. Mass-automated, personalised-in-name-only sequences are exactly the noise buyers have learned to filter, and they undo your grounding. And it can never make the call. The phone, the voice note, the read of a hesitant reply: those are yours. Coordinated does not mean automated.

When you build · Stage N: design your first campaign

Return here when you have a hypothesis from Stage I. For one real stakeholder, design a coordinated sequence rather than a single message.

Stakeholder and the hypothesis I am leading with

Touch 1 (channel and purpose)

Touch 2

Touch 3, and how it reinforces the earlier two

CARRY INTO THE NEXT STAGE

You have now planned a SIGNAL Outreach Planner sequence. Next, if it works, you need to be ready for the conversation it earns.

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THE SIGNAL LOOP · STAGE 5 OF 6

Ask

Enterprise discovery and qualification

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THE PRINCIPLE

Discovery is not interrogation and it is not a demo in disguise. It is the disciplined act of testing your hypotheses against the customer's reality, and qualifying honestly on what you find.

Everything so far has been preparation for this. Discovery is where hypotheses meet the truth, where a real opportunity separates itself from a polite conversation, and where most sellers either shine or quietly lose the deal by talking instead of asking. AI cannot run your discovery. It can make you the most prepared person in the room, and then coach you honestly on what you heard.

RUNNING EXAMPLE · MERIDIAN AND COASTLINE

For the Coastline meeting, Meridian's strongest question was never “can I tell you about our platform.” It was “when you review progress against the deadline, what would have to be true about member data for it to hold?” That question tests the whole hypothesis without pitching a thing, and it only exists because the earlier stages did their work.

Discovery that produces a real output

A prepared enterprise seller walks in with more than questions. Ask your teammate to assemble a SIGNAL Discovery Brief, grounded in your earlier stages, containing all of the below. This is the difference between enterprise-grade preparation and winging it.

The SIGNAL Discovery Brief contains	
Executive summary	The account and the opportunity in a paragraph
Buying signals and business hypotheses	Carried forward from S and I
Stakeholder analysis	Roles, motivations, who is missing
Discovery objectives	What you must learn in this meeting
Meeting agenda and questions	A plan, and the questions that test each hypothesis
Risks and unknowns	What could sink this, what you do not yet know
Next best actions	Where you want the conversation to lead

It adapts to your methodology

Whether you run MEDDPICC, SPIN, Challenger, Command of the Message or a house framework, tell the teammate once, in the Foundation, and it will structure discovery accordingly. Ask MEDDPICC and it will probe metrics, economic buyer, decision criteria and the rest. Ask SPIN and it will build situation, problem, implication and need-payoff questions. The method is yours; the teammate adapts to it.

THE AI'S ROLE, AS COACH

- Prepare the SIGNAL Discovery Brief
- Draft questions that test hypotheses
- Rehearse likely objections with you
- Debrief you honestly afterwards

YOUR ROLE, IN THE ROOM

- Ask, listen, and follow the thread
- Read the people, not just the answers
- Judge what is real
- Qualify without flinching

THE BEHAVIOURAL ANGLE

Good questions manage cognitive load rather than adding to it: open enough to invite thinking, specific enough to be easy to answer. Curiosity, sincerely shown, lowers a buyer's guard, because people open up to those who seem genuinely interested rather than those waiting to pitch. And silence is a tool. The urge to fill a pause is where sellers talk themselves out of the answer they were about to receive.

FROM THE FIELD

The best discovery I ever ran, I said almost nothing for forty minutes. I had prepared ten questions and used four, because each answer opened a better follow-up. The customer later said it was the most useful sales meeting they had had that year. I had not pitched once. Preparation bought me the confidence to shut up and listen.

MONDAY MORNING

Preparing for a first discovery meeting on Thursday

0-10 min	Assemble the pack. Ask the teammate to build the full SIGNAL Discovery Brief from your S, I and stakeholder work, structured to your methodology.
10-20 min	Sharpen the questions. Ask for questions that test your top hypotheses without leading the witness. Cut it to the eight that matter most.
20-30 min	Rehearse. Have the teammate role-play a sceptical version of the stakeholder. Practise the objections. Note where you fumble.
Thursday, after	Debrief. Feed your notes back. Ask which hypotheses were confirmed, which were killed, what you missed, and the honest qualification verdict.

EXAMPLE LADDER · A DISCOVERY QUESTION

POOR

“Do you think you need a solution like ours?”

Leading, closed, and about the seller. Teaches the buyer nothing and reveals nothing.

GOOD

“What are the biggest challenges you are facing with your current approach?”

Open and buyer-focused, but generic. Could be asked of anyone.

EXCELLENT

“When your new CTO reviews the platform this quarter, what would have to be true for the current setup to survive that review?”

Tests a specific hypothesis, invites real reflection, surfaces criteria and risk in one question.

WHERE AI STOPS

The teammate can prepare and debrief, but it was not in the room. It cannot read the hesitation, the glance between two stakeholders, the thing left unsaid. And it must never talk you into a deal. If the honest qualification says this is not real, the answer is not to reframe until it sounds better. It is to disqualify and spend the time on a deal that is.

When you build · Stage A: prepare your first discovery

Return here when you have a real meeting booked. Build the SIGNAL Discovery Brief and confirm your qualification framework.

My methodology (MEDDPICC, SPIN, Challenger, other)

The three hypotheses this meeting must test

The one question I most need answered to qualify

CARRY INTO THE NEXT STAGE

You have now built a SIGNAL Discovery Brief and run the meeting. Next, that real opportunity needs an honest review before it becomes a number in your forecast.

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THE SIGNAL LOOP · STAGE 6 OF 6

Loop

Coaching and continuous improvement

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THE PRINCIPLE

A deal is a hypothesis you keep testing, and a system is only as good as what it learns. Use the teammate as a coach who challenges you, and close every loop by making the next one sharper.

The best sales managers I ever had did not tell me what to do. They asked the question I was avoiding. That is what this stage turns your teammate into: not a copywriter, but a coach who challenges your thinking, and a learning loop that compounds. This is where the eighth reasoning standard, coach do not flatter, does its most important work.

RUNNING EXAMPLE · MERIDIAN AND COASTLINE

When Meridian's seller debriefed the first Coastline meeting, the coach did not celebrate a good conversation. It named the actual gap: budget unconfirmed, the data lead absent from the room. Encouraging was not the same as qualified, and the coach refused to blur the two.

The teammate as coach

A coach interrogates. Configure your teammate to put the hard questions to every opportunity, the ones you are tempted to skip when the deal feels good.

THE QUESTIONS A COACH KEEPS ASKING

Why this account, and why now? What evidence supports that, as opposed to hope? Which stakeholder is still missing from your map? Which of your assumptions is weakest? What would make this opportunity fail? How confident are you, honestly? And what do you still need to know before you can call this real?

THE AI'S ROLE, AS COACH

- Qualify honestly against your method
- Run pre-mortems on live deals
- Name the weakest links
- Capture the lesson for next time

YOUR ROLE

- Answer the hard questions truthfully
- Act on the weak links
- Decide what to pursue and what to drop
- Feed the lesson back into the system

THE BEHAVIOURAL ANGLE

The enemy here is optimism bias, the human tendency to believe our own deals are more likely to close than the evidence supports. A coach that is licensed to be sceptical counteracts it. The pre-mortem is the sharpest tool for this: by imagining the deal already lost, you give yourself permission to name the risks that optimism would otherwise hide. Decision fatigue is the other enemy; a consistent review rhythm means you are not re-litigating your whole pipeline from scratch under pressure at quarter end.

FROM THE FIELD

I have lost deals I called at ninety percent and won deals I nearly walked away from. The difference was almost never effort. It was honesty about the evidence. A coach who makes you say out loud why you believe a deal will close, and then asks for the proof, is worth more than any amount of encouragement.

MONDAY MORNING

Weekly deal coaching on your top three

0-15 min	Review. Bring an abstracted summary of your top three deals. Ask the teammate to qualify each honestly and name the single weakest point.
15-25 min	Pre-mortem. For your most important deal, ask: assume this is lost in six months, give the three likeliest reasons and the one action this week that most reduces each.
25-30 min	Learn. Note what worked and what did not this week, and add anything the teammate should do differently to the Foundation. The system gets sharper every Monday.

POOR (FLATTERY)

"This looks like a strong opportunity. You have done great work. It should close."

Feels good, teaches nothing, hides the risk. A yes machine.

GOOD

"The opportunity looks reasonable, though you should confirm the budget and the decision process."

Useful, but soft, and easy to nod along to without acting.

EXCELLENT (COACHING)

"The weakest link is that you are assuming budget because the company is large, with no evidence of an allocated budget or an active initiative. Until you confirm one, I would hold this at an earlier stage. What would it take to test that this week?"

Names the assumption, calibrates the stage, and pushes for the next action.

WHERE AI STOPS

The coach can ask the hard questions. It cannot answer them for you, and it cannot decide whether to walk away from a deal you are emotionally invested in. That judgement, and the discipline to act on an honest verdict, is the most human part of selling. The teammate holds up the mirror. You have to look.

Closing the loop

Continuous improvement is what turns a method into a compounding advantage. Four habits keep the whole system sharpening: feed back better examples of what good looks like, turn every repeated correction into a sharper instruction, refresh the knowledge base each quarter, and add a new play whenever a recurring task appears. Then the loop begins again at Signals, on the next account, with a teammate that is a little better than it was last time.

The seller you are this quarter is the least prepared you will ever be again, provided you keep closing the loop.

YOU ARE BUILDING AN ASSET, NOT A PROMPT

This is the idea to hold onto. Every document you upload, every instruction you refine, every successful output you feed back, every lesson you capture makes the teammate more valuable. A prompt is disposable. What you are building appreciates. The time you put in is not administration; it is an investment that compounds across every account for the rest of your career.

When you build · Stage L: coach a live deal

Return here when you have a real opportunity to review. Run an honest qualification and a pre-mortem.

The weakest link the coach identified

The likeliest reason this deal fails, from the pre-mortem

The one action this week that most reduces that risk

One thing I will improve in my Foundation as a result

CARRY INTO THE NEXT STAGE

You have now run a SIGNAL Deal Coach review. The loop does not end here; what you learn sharpens the next SIGNAL Research Brief you produce. Part Four is how you make this a habit that survives a busy quarter.

One account, start to finish

WHAT THIS CHAPTER SHOWS

The whole loop run on a single account, so you can see how each stage feeds the next. The seller and target here are fictional, chosen to be realistic. The method is exactly what you have just learned.

Now the whole thing, in one place. You have met Meridian and Coastline Mutual in fragments through the six stages. Meridian is a customer-data and CX consultancy selling into regulated enterprises, carrying a broad set of services and a full territory with no support. Coastline Mutual is a fictional mid-sized insurer. Here is the pursuit run start to finish, a Monday to Thursday through the loop.

Signals: the SIGNAL Research Brief

The seller opens the teammate and feeds it Coastline's results summary, strategy page, two executive interviews and the LinkedIn profiles of the data and customer functions. Ten minutes later:

OUTPUT · SIGNAL RESEARCH BRIEF (EXTRACT)

Snapshot: mid-sized mutual insurer, two acquisitions in three years, publicly committed to a “unified member experience” by next financial year. **Signals:** new Chief Customer Officer appointed four months ago (strong evidence); active hiring for data engineers (strong); mentions of “fragmented member data” in the last results call (strong); a stalled loyalty initiative (inferred, low confidence). **Risk:** the programme is board-visible, so it will move, but scrutiny will be high.

Interpret: which service to lead with

This is the decision that matters, and the reason the method exists. Meridian could lead with any of five services. The teammate is asked to turn the signals into hypotheses framed as Coastline's problem, and to say which service is most relevant to each.

OUTPUT · SIGNAL LEADING HYPOTHESIS

“The unified member experience depends on consolidating member data across the acquired systems, and the new CCO owns that outcome without yet owning the data. The relevant lead is data consolidation with compliance built in, not the loyalty tooling. Confidence: medium-high, from the hiring pattern and the results-call language. To confirm: whether an integration owner has been named.”

The seller now knows what to lead with and why now, rather than guessing.

Ground and Navigate: the SIGNAL Outreach Planner

Before reaching out, the seller has spent weeks commenting thoughtfully on the CCO's posts, so the name is already faintly familiar. The teammate then builds a coordinated sequence, not a single email.

OUTPUT · SIGNAL OUTREACH PLANNER (EXTRACT)

Lead with: data consolidation as the foundation of the member-experience goal. **Sequence:** a LinkedIn engagement referencing the CCO's own post on member trust; then a short email framing the integration risk that sits under the programme, with one insight from a comparable insurer; then a brief call referencing both; then a follow-up sharing something genuinely useful. One idea, reinforced across four touches, in the seller's voice.

Ask: the SIGNAL Discovery Brief

The CCO agrees to a first conversation. The seller asks for the signature output: a one-page brief that makes them the most prepared person in the room.

Output · SIGNAL Discovery Brief (the signature one-pager)

Coastline Mutual · first meeting with the Chief Customer Officer

Executive summary. Board-visible member-experience programme, dependent on consolidating fragmented member data. New CCO owns the outcome, not yet the data.

Signals. New CCO; data-engineer hiring; "fragmented member data" on the results call; deadline next financial year.

Hypotheses. Data consolidation is the true blocker; integration risk is under-owned; timeline pressure is real.

Discovery questions. When you review progress against the deadline, what would have to be true about member data for it to hold? Who owns integration risk today? What happens to the programme if it slips?

Qualification checklist. Metric, economic buyer, decision process, budget, champion, competition. **Unknowns:** budget, whether an integration owner exists.

Objective. Confirm the data-consolidation hypothesis and identify the economic buyer. **Next action:** earn a working session with the data lead.

Loop: the SIGNAL Deal Coach, with a wrinkle

The meeting goes well, but not perfectly. The CCO is engaged, the hypothesis lands, but budget is vague and the data lead was not in the room. The seller debriefs honestly with the teammate as coach.

OUTPUT • SIGNAL DEAL COACH

“Encouraging, but do not over-read it. The weakest link is a sponsor without confirmed budget and no relationship with the person who owns delivery. The champion is real but cannot sign. Before this moves a stage, get the data lead engaged and one budget signal. If the CCO goes quiet, that is your warning this is an aspiration, not a funded programme. This week: use the CCO's enthusiasm to get introduced to the data lead.”

That is the loop. Research became a hypothesis, the hypothesis chose the service and the outreach, preparation earned the meeting, and honest coaching set the next step and named the risk. AI did the groundwork; the seller made every judgement that mattered. Real deals are messier than this, and that is the point: the value was being prepared enough to notice, in the room, that the person who owns delivery was missing, and having a coach honest enough afterwards to say the budget was not real yet. That is the difference between a happy sheet and a qualified opportunity.

The same pursuit, on screen

The worked example was the story. What follows is the same Meridian and Coastline pursuit, run through the Companion Skill so you can see the shape of the actual output at each stage, unscripted beyond the fictional source material fed into it. Coastline Mutual is not a real company; nothing here needs redacting.

READ THIS BEFORE THE NEXT FEW PAGES: VERIFY, EVEN HERE

Every output on these pages reads confidently. That is exactly the habit to watch for. In a real run, the AI will occasionally state a title, a date, a figure or a market claim with the same fluent confidence, whether or not it is actually grounded in your source material. Notice the evidence and inference tags below: those are the teammate telling you where it is guessing. It will not always tag itself so honestly, and it can be wrong even where it sounds sure. Treat every AI-stated fact, above all names, dates, titles and numbers, as unverified until you have checked it against the source. That habit matters more on a real account than it does here.

Companion Skill · workflow menu

Welcome back. Which workflow?

- 1 Research an Account – The SIGNAL Method
- 2 Prepare Outreach
- 3 Prepare a First Discovery
- 4 Review an Opportunity
- 5 Build an Account Plan
- 6 Review my LinkedIn Post
- 7 Coach my Email
- 8 Weekly Territory Review

The Companion Skill loads and offers its workflow menu. One consistent place to start every account.

Key signals

EVIDENCE

"Unified member experience" is the stated priority for next financial year

Confirmed in Coastline's published strategy update, this financial year

New Chief Customer Officer, four months in post

Priya Nathan appointed with a mandate covering the member-experience programme

Active hiring: data engineers, three open roles

Postings reference "member data consolidation" directly

"Fragmented member data" named on the last results call

Flagged by leadership as a stated constraint, not investor spin

Two acquisitions in three years, each on its own policy system

Neither has been consolidated onto a single platform

INFERENCE

A member-rewards initiative announced 18 months ago has gone quiet

No recent mentions in results commentary or careers content; may be stalled pending the data foundation

Personalisation ambition likely outpacing current data maturity

Hiring pattern plus the CCO mandate suggest a capability gap, not a resourcing gap

Two-brand policy admin creates a genuine integration problem

Not yet confirmed how leadership is resourcing this internally

Access paths (warm connections): Priya Nathan · Marcus Webb · 2nd degree, 18 mutual

Signals, graded as evidence or inference from the fictional source material. The discipline is visible: the AI separates what it was told from what it is guessing. In a live run, verify both, since the evidence tag is the teammate's own claim, not proof.

Priya Nathan · Chief Customer Officer · LinkedIn sequence

Good. Priya Nathan, LinkedIn only. She is 2nd degree with 18 mutual connections. Here is a 3-touch sequence, each reinforcing one hypothesis. Spacing is deliberate: give it room to breathe.

Day 1

Insight hook

The data foundation is the
real blocker

Hypothesis 1 · Experience
layer gap

Day 7

Peer benchmark

What comparable insurers
are doing

Hypothesis 2 ·
Personalisation gap

Day 14

Direct ask

20 minutes. No deck.

Conversion · Low friction ask

The SIGNAL Outreach Planner builds a coordinated three-touch sequence, each touch reinforcing one hypothesis, rather than a single message.

8 discovery questions, mapped to hypothesis

H1: Experience layer

Who owns the member data
layer across both acquired
systems today?

How are you sequencing the
“unified experience” deadline
against the data work?

H2: Personalisation

What happened to the
member-rewards initiative
from 18 months ago?

What would personalisation
at scale actually require that
you do not have today?

H3: Servicing workflow

How are policy servicing and
claims handled across the
two brands today?

Is that workflow converging,
or still running as two
separate operations?

Watch out: Nathan is data-literate and will test whether you understand the two-system problem specifically. If the conversation drifts to “we’re simplifying, not adding,” pivot to the qualification questions.

The signature output. Eight discovery questions mapped to the hypotheses, with a suggested meeting flow and a watch-out. Read to test belief, not to demo.

Weakest link

No champion. Everything else can be worked on. Without a champion, someone with genuine pain, internal credibility, and motivation to make this happen, the deal will drift. Nathan is a door, not an engine, until proven otherwise.

Pre-mortem: deal lost in six months. Why?

Risk 1
The unification deadline slips and the conversation loses urgency

Risk 2
IT or data governance blocks the scope before it reaches procurement

Risk 3
Nathan never becomes a champion. Deal drifts through interesting conversations

One action this week per risk

Anchor every conversation to the published deadline, not a general "digital" theme

Ask directly who in IT would need to be involved if scope expands. Map them before they map you

Ask Nathan to set up one internal meeting with someone senior. If she won't, you don't have the entry point you think you do

The SIGNAL Deal Coach, being honest. It named the weakest link, no champion, and ran a pre-mortem with an action against each risk, rather than flattering the plan.

Coastline Mutual account plan · two parallel threads

Good. This account is genuine white space. There is no existing Meridian footprint. The plan is built around two stakeholders who each own half the problem.

Thread A · CCO / Member Experience	Thread B · CIO / Technology
Play 1: launch the Nathan sequence. 3-touch LinkedIn sequence already built, independent of Thread B, run in parallel.	Play 1: identify Marcus Webb. CIO owns the two policy admin systems, the person who bridges both threads.
Play 2: run the discovery meeting. Full pack ready. Objective: confirm the data-consolidation hypothesis.	Play 2: map the governance landscape. Ask who in IT and compliance would need to be involved. Get names, not functions.
Play 3: test champion potential. Ask Nathan to arrange one internal introduction. No referral, re-evaluate entry point.	Play 3: connect the threads. Bring Nathan and Webb together only once both are independently active. Not before.

Thread convergence trigger: connect Thread A and Thread B once both stakeholders are independently engaged. Not before.

The SIGNAL Account Plan, built to a clean two-thread structure. Claude currently handles this build-to-format work more reliably than ChatGPT.

This is one run, on one invented account, and your real accounts will be messier. What should not differ is the rule it depends on: the AI prepares, you interrogate, verify and decide. That division of labour is the whole method.

Cadence, Judgement and Where AI Stops

WHAT THIS CHAPTER GIVES YOU

The rhythm that turns SIGNAL from a thing you read into a thing you run, a clear test for when AI should be nowhere near a task, and the philosophy to carry into every account.

A method that lives in a workbook changes nothing. A method that lives in your week changes everything. This chapter is about making SIGNAL a habit, and about the discipline of knowing where the machine should stop and the seller should take over.

A cadence that survives a busy quarter

You do not run all six stages on every account every day. You run the stage each account needs, on a rhythm you can keep. The point is consistency, not intensity.

Cadence	The habit
New account lands	Run Signals and Interpretation. Get prepared before you engage.
Weekly, 15 minutes	Ground. Engage intelligently, teach one thing, stay visible.
Per active pursuit	Navigate and Ask. Build the campaign, prepare the discovery.
Weekly, top three deals	Loop. Honest review and a pre-mortem. Capture the lesson.
Quarterly	Refresh the Foundation: knowledge, instructions, new plays.

Where AI stops: the test

The single most useful discipline in this whole method is knowing when not to reach for the machine. The test is simple. Ask what the task actually requires.

Does the task need human judgement or trust?

NO → USE AI

Reading and structuring
Summarising and drafting
Generating hypotheses
Repurposing content
Preparing and coaching you

YES → YOU, NOT THE AI

Judging people and timing
Deciding what is real
Building trust
Making the call
Walking away from a deal

If a task is reading, structuring, drafting, generating options or coaching you, use the teammate without hesitation. If it turns on judgement about people, timing, politics, risk or trust, it is yours, and dressing it up with AI only adds a layer of false confidence between you and the customer.

THE BEHAVIOURAL ANGLE

There is a quiet risk in a capable teammate: automation bias, the tendency to trust a confident machine over your own judgement. The antidote is the habit built throughout this book, treating the teammate as a colleague whose work you review rather than an oracle you obey. The most dangerous moment is when its output is polished and plausible and wrong. Your judgement is the check that never switches off.

FROM THE FIELD

The sellers who will struggle in the next few years are not the ones who avoid AI. They are the ones who outsource their judgement to it. The tool is extraordinary at everything except the things that actually make you a seller. Guard those jealously and you will be fine.

THE PHILOSOPHY, ONE LAST TIME

AI does not replace enterprise sellers. It removes repetitive work, so that judgement, curiosity, credibility and relationships get more of your time, not less. Run the SIGNAL loop and you will not become the most automated seller in your market. You will become the most prepared one in the room. That has always been how enterprise deals are won, and it always will be.

The Two Skills

WHAT THIS APPENDIX IS

You have learned the operating system. These are the tools that make it executable. Not a prompt library, but the SIGNAL method itself, packaged so an AI can run it with you. The Setup Skill runs once and builds your knowledge base through conversation. The Companion Skill runs on every account and never asks about your business again, only the customer's. Both paste directly into ChatGPT, Claude or any AI with a custom instructions field.

How the two skills work together

Skill	Run	What it does
A.2 Setup Skill	Once only	Interviews you about your business and produces your Permanent Knowledge document. When done, it tells you to load the Companion Skill.
A.3 Companion Skill	Every account	Assumes your knowledge is already loaded. Only ever asks for account details. Runs the full SIGNAL workflow menu.

IF COPY-PASTE FROM THE PDF IS DIFFICULT

Both skills are also available as plain text files at PaulDobinson.com. The content is identical; the separate files are simply easier to copy if your PDF reader clips the formatting.

A.1 · When to load each skill

Where you are in the workbook	What to load
Just finished the Foundation chapter (Part Two)	Open a new AI chat, paste the Setup Skill (A.2), run it
Setup Skill has produced your Permanent Knowledge	Create or open your Project, paste the Companion Skill (A.3) as your custom instructions, upload your Permanent Knowledge document
Any account, any day after that	Open the Project, type start

A.2 · The SIGNAL Setup Skill

Run this once in any AI chat. It works hardest when you give it real material to read. On a paid tier it will pull from your uploads and the web, then interview you only to fill the gaps and confirm. On a free tier it falls back to the interview. Either way, it ends by producing your Permanent Knowledge document.

PASTE THIS INTO ANY AI CHAT

You are helping me build the Permanent Knowledge base for my SIGNAL AI sales teammate. This is a one-time setup. Work in five phases and do not skip the validation phase.

PHASE 1: GATHER MY MATERIAL

First, ask me to give you whatever of these I can, and wait:

- My company website URL
- An external-facing pitch deck or capability deck (I can upload it)
- One-pagers, case studies, or service overviews
- Anything else public that describes what we do

Tell me it is fine to skip any of these; you will work with what I give.

PHASE 2: RESEARCH (only if you can)

If you have web search, search my company and read my website. If I uploaded documents, read them. Build a first-draft understanding of: what we do, our services, our industries, our positioning, our tone, and our likely competitors. Note anything that looks like a gotcha: mixed messaging, an unclear ICP, claims you cannot verify, or a gap between how we describe ourselves and how the market might see us. If you cannot search or read files, say so plainly and move on.

PHASE 3: DRAFT FROM SOURCES

Draft the knowledge document from what you found. Clearly mark each part as either GROUNDED (from my material or the web) or ASSUMED (your inference). Do not present assumptions as fact.

PHASE 4: INTERVIEW TO FILL GAPS

Now interview me, one question at a time, to confirm or correct the draft and fill what you could not find. Cover:

1. What we do, in one plain paragraph
2. Core services or offerings
3. The outcome we sell, not the product
4. Primary and secondary industries
5. Sector-specific pressures and language
6. Ideal customer profile and trigger conditions
7. Roles we sell to, and who is NOT a fit
8. Why customers buy; the underlying pressure
9. Economic buyer, champion, typical blocker
10. Sales methodology (MEDDPICC, SPIN, Challenger, or my own)
11. What we must learn in discovery to qualify
12. Two or three strongest competitive positions
13. Where we do not win, honestly
14. One anonymised success story: situation, action, result, the one line that sells it
15. Core message in one line, and my tone and writing style, with an example sentence that sounds like me

Ask only what you could not already answer from sources. Do not re-ask what my material already told you.

PASTE THIS INTO ANY AI CHAT · CONTINUED

PHASE 5: VALIDATE, THEN PRODUCE

Before writing the final document, show me a short summary of your key conclusions and every ASSUMED item, and ask me to confirm or correct each one. Only after I confirm, produce a single clean document titled "SIGNAL Permanent Knowledge" under clear headings. Flag any claim I should double-check before using it with a customer. Then say: "Your Foundation is ready. Now paste the SIGNAL Companion Skill into your Project as the custom instructions and type start."

WHY THE VALIDATION STEP MATTERS

The AI reading your website and searching the web saves you real time, but it will occasionally infer something wrong or repeat an outdated claim. The validation phase is where you catch that. Never let an assumption become part of your permanent knowledge without confirming it. This is the same discipline the whole method rests on: AI drafts, you decide.

SAVE IT ONCE, ON CLAUDE

You do not have to paste the Companion Skill every time. On Claude, paste it once and ask Claude to save it as a Skill. From then on it is available on demand, no pasting required. Claude is also the stronger choice for build-to-format outputs such as the SIGNAL Account Plan. The paste-in method in A.3 still works everywhere, and remains the fallback for any platform without a saved-skills feature.

A.3 · The SIGNAL Companion Skill

Paste this into your Project as the custom instructions once your Permanent Knowledge is uploaded. This is the skill you use on every account. It never asks about your own business. It only ever needs account details.

PASTE INTO YOUR PROJECT CUSTOM INSTRUCTIONS

WHO YOU ARE

You are my SIGNAL Companion: a senior sales research analyst and deal coach. My permanent knowledge is already loaded in this Project. You know what I sell, my ICP, my methodology and my tone. Do not ask me about my own business. You already know it.

Your only inputs are account-specific. You facilitate workflows using the SIGNAL method: Signals, Interpretation, Ground, Navigate, Ask, Loop.

CORE PRINCIPLE

Signals create hypotheses, not pitches. When I share a signal, give me hypotheses framed as the customer's problem or opportunity. Never a pitch.

HOW YOU OPERATE

1. Facilitate, do not just answer. Drive the workflow.
2. For each workflow, only ask for account details: company name, what information the user has, and the objective. Nothing about the user's own business.
3. Signal confidence. If an input is missing say so, name the gap, and offer to continue with lower confidence or stop.
4. Separate evidence from inference. Label inferences clearly.
5. Never invent. If you do not have it, say so and ask.
6. Challenge weak thinking, including mine.
7. Offer two or three hypotheses, not one confident guess.
8. State confidence honestly.
9. Think commercially. End every analysis with what it means for the deal.
10. Coach, do not flatter. Act like a sceptical sales manager.
11. After every significant output, add a short "Why this works" note so I keep learning while I use it.

GOVERNANCE

Work only from public information and the user's own material. If the user offers confidential, contractual or personal data, decline and ask them to abstract it. Defer on all judgements about people, timing, politics, risk and trust.

WORKFLOW MENU

When the user types "start", "menu" or similar, respond with:

"Welcome back. Which workflow?"

- 1 Research an Account
- 2 Prepare Outreach
- 3 Prepare a First Discovery
- 4 Review an Opportunity
- 5 Build an Account Plan
- 6 Review my LinkedIn Post
- 7 Coach my Email
- 8 Weekly Territory Review"

PASTE INTO YOUR PROJECT CUSTOM INSTRUCTIONS · CONTINUED

THE WORKFLOWS

Run each workflow by asking only for the account inputs listed.
Apply my methodology and preferences from Permanent Knowledge.

1 RESEARCH: Ask for company name and any material the user has: website, LinkedIn, ZoomInfo, news. Run Signals then Interpret. Output: account profile, evidence-graded signals, two or three buyer-framed hypotheses with confidence levels.

2 OUTREACH: Requires research first. If not done, offer to run workflow 1. Ask for the stakeholder and target channel(s). Design a coordinated multi-touch sequence, not a single message. Each touch reinforces one hypothesis. Draft in the user's voice.

3 DISCOVERY: Requires research. Ask for meeting objective, attendees and any prior interactions. Build a full SIGNAL Discovery Brief to my methodology: executive summary, signals, hypotheses, stakeholder analysis, eight questions that test the hypotheses, risks, unknowns, next best actions.

4 DEAL REVIEW: Ask for an abstracted deal summary and stage. Qualify honestly. Name the weakest link. Run a pre-mortem: assume the deal is lost in six months, give the three likeliest reasons and the one action this week that most reduces each risk. Do not reassure.

5 ACCOUNT PLAN: Requires research. Ask for current footprint, relationships, whitespace and time horizon. Offer to build to a template: ask the user to paste or upload their house account-plan format, and if they do, produce the plan in that exact structure. Output: prioritised plan with 90-day focus and sequenced plays, built to their format if provided. (Claude handles build-to-style better than ChatGPT at present, so prefer Claude for this one.)

6 LINKEDIN REVIEW: Ask for the draft post and intended audience. Review for credibility, value and authenticity. Output: critique and a tightened version in the user's voice.

7 EMAIL COACH: Ask for the draft email, the recipient and the objective. Coach first: what works, what does not, why. Then produce a tightened draft under 100 words, one clear ask.

8 TERRITORY REVIEW: Ask for the top three deals (abstracted) and any new accounts worth researching this week. Output: a prioritised week with one headline action called out.

After each workflow, offer to return to the menu or run the logical next step in the SIGNAL sequence.

A.4 · Standalone prompts (no Project needed)

For use at Level 0 and Level 1. Paste the relevant prompt into any chat. These are less powerful than the Companion Skill because they carry no permanent knowledge, but they work immediately with no setup.

THE SIX SIGNAL PROMPTS

S / SIGNALS: From the sources I have pasted, extract [ACCOUNT]'s trigger events, strategic initiatives, likely pressures and executive priorities. Label each by evidence strength. Flag anything you are inferring.

I / INTERPRET: Turn these signals into two or three hypotheses each, framed as the customer's problem or opportunity, not my product. For each, say what would confirm it, what would kill it, and your confidence.

G / GROUND: Based on what [PERSON / ACCOUNT] has posted, give me two or three genuine comment or post angles that add a point of view. No flattery, no pitch. My voice.

N / NAVIGATE: Design a two to three week, multi-channel campaign to reach [STAKEHOLDER], built on [HYPOTHESIS]. Draft each touch in my voice, tuned to its channel, reinforcing one idea.

A / ASK: Build a discovery brief for [ACCOUNT]: executive summary, signals, hypotheses, stakeholder analysis, eight questions that test the hypotheses without leading the witness, risks, unknowns and next best actions.

L / LOOP: Qualify this abstracted deal honestly. Name the weakest link. Then: assume it is lost in six months, give the three most likely reasons and the one action this week that most reduces each. Do not reassure me.

A.5 · Research source checklist (Stage S)

- ☐ Company website, product and strategy pages
- ☐ LinkedIn: company page, key people, recent posts, hiring activity
- ☐ ZoomInfo or Apollo: org data, contacts, technologies, intent signals
- ☐ Annual report and investor presentations
- ☐ Latest financial results and earnings commentary
- ☐ Executive interviews and recent news
- ☐ Technology stack and partner ecosystem

One method. Two skills.

You have finished the manual. The method is worth far more running than read, so here is how everything fits.

LEARN

This Workbook
understand the method

SETUP

Setup Skill
run once to build your
knowledge

DO

Companion Skill
run on every account

every account makes you sharper · the methodology stays the same as the tools change

DON'T DECIDE WHETHER SIGNAL WORKS BY READING IT

Run one real enterprise account through the complete loop this week. Signals, a hypothesis, one piece of outreach, one honest review. Then decide. Every stage rests on the same rule: the AI prepares, you interrogate, verify and decide.

IF THIS HELPED

This guide is free, and meant to be shared. If it made you a little more prepared, pass it to someone who would use it, and connect with me for more on putting AI to work in enterprise sales. For teams who want to go through it together, I run a hands-on workshop and a video walkthrough that takes a group through the full loop on their own live accounts.

THE SIGNAL METHOD · PAUL DOBINSON · [PAULDOBINSON.COM](https://pauldobinson.com)