28TH SEPTEMBER 2026

Connectd

Connectd **Signal**

How to use Connectd Signal, step by step. Where to click, what to look for and what to do, so the daily workflow takes minutes, not mornings.

THE DAILY RULE

Start in Today. Work the queue. Record every outcome. Review Insights weekly.

QUICK START GUIDE

THE DAILY WORKFLOW

Four views. One quiet routine.

Signal researches the market in the background, so you only ever see the next useful action. Here is the whole routine at a glance, then each step in detail.

01
Today
Start here. See only the work that needs attention now.

02
Workspace
Review the company, contact, message and next action.

03
Record
Replies, meetings and skips become evidence for the next cycle.

04
Insights
Review performance, bottlenecks and the next-cycle plan.

Market Scanner is mainly context. You do not need to work there every day. Check it now and then to see what the research layer is finding.

WHAT SIGNAL DOES FOR YOU

In the background

It monitors approved sources, removes duplicates, checks every company against the ICP and keeps waiting, monitoring and snoozed leads out of your way.

In front of you

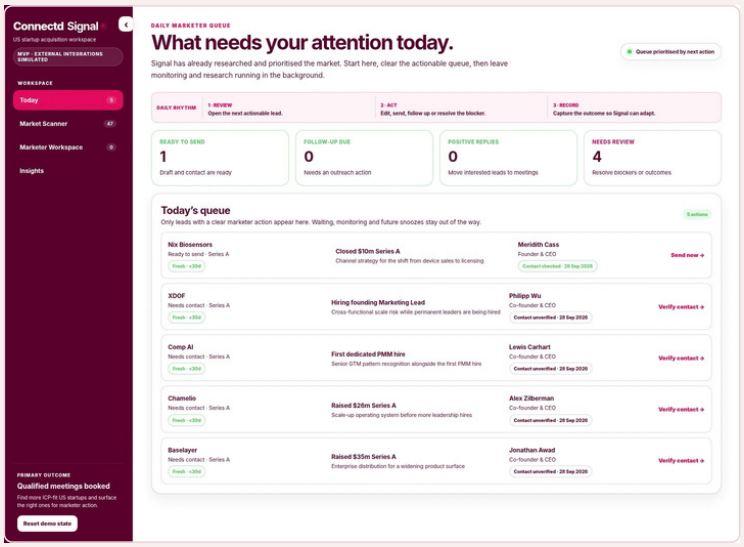
It shows why a company matters now, who to contact, the recommended angle and the next best action, all in one place.

The loop only works if outcomes are recorded. Research, then your action, then the outcome, then the insight, then the next cycle.

STEP 1

Start every day in Today.

Today is the working queue. Signal has already filtered out anything waiting, monitoring or snoozed, so you start with action, not research.



1 Check the four action cards

CLICK Ready to send, Follow-up due, Positive replies or Needs review, at the top of Today.
DO Use the cards to see your workload. Click one to jump straight to that filtered work.
THEN Marketer Workspace opens with the filter already applied.

2 Work the queue from the top

CLICK The company, or the action on the right.
DO Open the next item and deal with the action Signal has surfaced.
THEN The company opens in Marketer Workspace with its detail panel and recommended next action.

3 Leave monitoring work alone

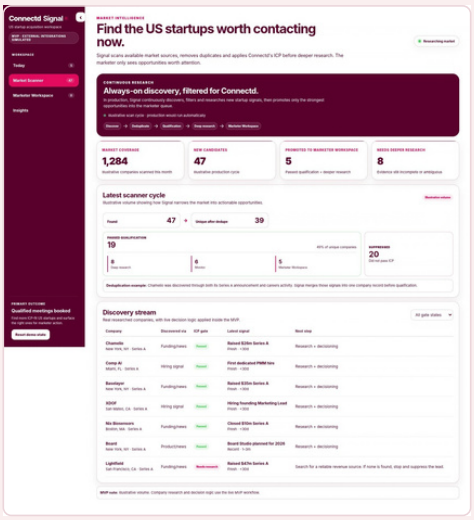
CLICK Nothing to click.
DO If a lead is waiting, monitoring or snoozed for a future date, leave it.
THEN Signal keeps it out of Today until it becomes actionable again.

A clean Today queue is the goal. You should not spend the morning searching for companies that may or may not be worth contacting.

STEP 2

Use Market Scanner for context.

Market Scanner shows what the research layer is finding and how companies move through qualification. Check it occasionally rather than living in it.



1 Read the latest scanner cycle

CLICK Market Scanner, then Latest scanner cycle.

DO Use the funnel to see how many companies were found, deduplicated, qualified, sent to deeper research, monitored or promoted.

THEN Companies that fail the core ICP are suppressed before any more research time is spent on them.

2 Review the discovery stream

CLICK Market Scanner, then Discovery stream.

DO Use the gate-state filter to inspect Passed, Needs research or Suppressed companies.

THEN You see exactly why a company did or did not enter your working queue.

3 Open a company to investigate

CLICK A company row in the Discovery stream.

DO Do this when a signal looks interesting or you want to see the evidence behind a decision.

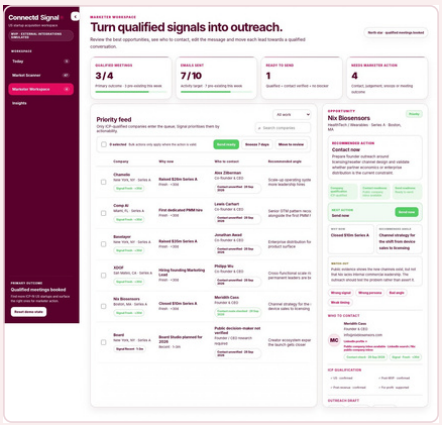
THEN The company opens in Marketer Workspace, where the actual decision is made.

Do not use Market Scanner as a prospecting spreadsheet. Its job is to make the research visible, not to create another manual task.

STEP 3

Decide in Marketer Workspace.

Your main working area. The left is the priority feed. The right is the selected opportunity: why now, contact route, message and next action.



1 Find the work you need

CLICK The filter dropdown or Search companies.

DO Filter by Ready to send, Needs contact, Needs review, Follow-up due, Positive replies, Waiting, Blocked or Snoozed.

THEN The feed narrows without changing any company's state.

2 Open an opportunity

CLICK A company row in the Priority feed.

DO Read the right-hand panel before acting. Start with Next action, Why now, Recommended angle and Watch-out.

THEN Evidence and qualification stay attached to the company, so you never need extra research tabs.

3 Check the contact route

CLICK Opportunity, then Who to contact.

DO Review the decision-maker, contact status and signal freshness. Click the LinkedIn profile to verify the public route.

THEN If contact evidence is not strong enough, the lead stays blocked rather than Signal inventing contact data.

4 Correct Signal when it is wrong

CLICK A feedback chip: Wrong signal, Wrong persona, Bad angle or Weak timing.

DO Click the relevant chip instead of quietly ignoring the recommendation.

THEN The correction is stored as directional evidence and appears in Insights for the next cycle.

STEP 4

Act, then record what happened.

The loop only learns from what you record. Made a mistake? Use Undo when it appears, though not every click can be reversed.

1 Edit the message

CLICK Opportunity, then Outreach draft.

DO Edit the subject and body directly. Use Shorter, More direct, Founder-led or Rewrite angle for a quick alternative.

THEN The draft updates right away. In production, rewrites use the approved language model.

2 Send only when it is ready

CLICK Send email, or select several valid rows and use Send ready.

DO Check the contact, qualification and recommended angle first.

THEN The lead moves to Sent and the email counter updates. In production, the connected inbox does the real send.

3 Manage no-reply and follow-up

CLICK After Sent, No reply - follow-up due, then Send follow-up.

DO Use the status to keep the sequence honest. Silence is not a reply.

THEN The lead moves through Follow-up due and Follow-up sent.

4 Record the response

CLICK Positive reply or Negative reply.

DO Choose the real outcome as soon as you know it.

THEN Positive replies move into the meeting workflow. Negative replies close the sequence and become learning evidence.

5 Close the meeting outcome

CLICK Meeting booked after a positive reply. Then Mark qualified or Mark unqualified.

DO A booked meeting is not automatically qualified. If unqualified, add the reason.

THEN Qualified meetings count towards the primary target. Unqualified reasons feed the next cycle.

6 Snooze or skip on purpose

CLICK Snooze, or Skip.

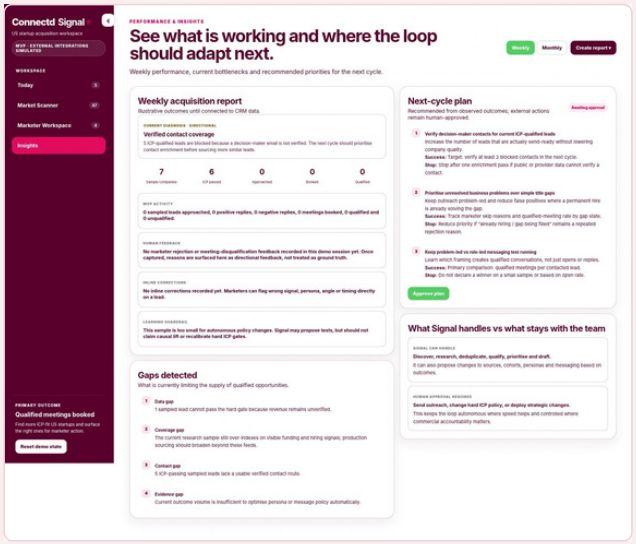
DO Snooze when fit is good but timing is wrong. Skip when you do not want to contact the lead. Add a reason either way.

THEN Snoozed leads return when due. Skip reasons are kept as marketer feedback.

STEP 5

Use Insights to close the loop.

Insights is not a dashboard to watch all day. Review it weekly, or whenever the team wants to know what is limiting qualified meetings and what should change next.



1 Choose the reporting window

CLICK Insights, then Weekly or Monthly.
DO Weekly for operating reviews, Monthly for the broader pattern.
THEN The funnel, bottleneck, learnings and next-cycle plan update to that view.

2 Read the bottleneck first

CLICK Weekly acquisition report, then Gaps detected.
DO Ask what is really limiting qualified meetings: contact coverage, decision confidence, message fit, reply-to-meeting conversion or top-of-funnel supply.
THEN The next-cycle plan is built around that constraint, not just more volume.

3 Approve the next-cycle plan

CLICK Next-cycle plan, then Approve plan.
DO Check the recommendation, expected result, metric and stop condition first.
THEN The plan is queued for the next cycle. Strategic changes stay human-approved.

STEP 5, CONTINUED

Create a shareable report.

Click Create report and choose the version that fits the audience. Signal generates a branded PDF from the current Insights view.

01

Executive Summary

For C-level sharing: outcome, bottleneck, learnings and priorities.

02

Meeting Deck

For the weekly GTM discussion.

03

Action Brief

A one-page operating plan for the next cycle.

When to review

Weekly by default, plus after any material change in conversion or lead quality.

THE WHOLE LOOP

Five habits.

1. Open Today first thing.
2. Work the queue in Marketer Workspace, top to bottom.
3. Correct Signal with a feedback chip when it is wrong.
4. Record every reply, meeting and skip.
5. Review Insights weekly and approve the next-cycle plan.

The loop is complete only when the team records outcomes. Research, marketer action, outcome, insight, next cycle.

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