

Signal-to-Action Gap Diagnostic Worksheet

A practical audit for teams that have buyer intent data but still struggle to turn signals into pipeline.



Use this as a practical working document. Print it, duplicate it for each campaign, or gate it behind a form as a lead magnet.

Who this is for

Use this worksheet when your team already has intent data, website alerts, enrichment, or CRM activity, but those signals are not reliably becoming meetings, opportunities, or pipeline.

Step 1 Score your signal-to-action gap

Score each area from 1 to 5. A score of 1 means unclear or broken. A score of 5 means defined, trusted, and measured.

# AREA	SCORE 1-5	EVIDENCE / NOTES	FIX NEEDED
	1 2 3 4 5		
	1 2 3 4 5		
	1 2 3 4 5		
	1 2 3 4 5		
	1 2 3 4 5		
	1 2 3 4 5		
	1 2 3 4 5		
	1 2 3 4 5		

Areas to score

☐ 01 We know which buyer signals the team trusts.

☐ 02 Each signal has a clear owner.

☐ 03 Each signal has a defined next action.

☐ 04 The signal includes enough context for sales to act.

☐ 05 High-intent alerts reach the owner quickly.

☐ 06 The response changes based on signal type and account context.

☐ 07 Outcomes are tracked beyond tasks, opens, or alerts.

☐ 08 Feedback is used to refine scoring, routing, and messaging.

Step 2 Map your current signal inventory

List the signals you already capture. Do not add new tools yet. The first goal is to understand which existing signals already have commercial value.

#	SIGNAL SOURCE	WHAT IT TELLS US	CURRENT OWNER	CURRENT ACTION	PIPELINE IMPACT

Step 3 Pick the three highest-leverage fixes

Choose fixes that improve speed, context, ownership, or measurement. Avoid building new automations until ownership and next actions are clear.

#	PRIORITY	FIX	OWNER	DEADLINE	SUCCESS METRIC
01					
02					
03					

Keep it to three. Fewer, well-owned fixes close the gap faster than another round of new automation.

WHAT MAKES A HIGH-LEVERAGE FIX



Speed

Cut the time from signal to first action.



Context

Give sales enough to act without digging.



Ownership

One clear owner per signal and next step.



Measurement

Track outcomes, not just tasks or opens.

NEXT STEP

If your buyer signals are not turning into pipeline, book a strategy call with InsightsTap to close the signal-to-action gap.

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