

The Winnability Gap

Why Pipeline Has Slowed, and
Why More Intent Data Won't Fix It

WHAT'S INSIDE

A strategic framework for understanding why modern demand programs struggle to convert pipeline efficiently, and the signal completeness model designed to fix it.

Pipeline is harder to build than it was two years ago. Many senior marketing leaders are reporting inbound pipeline down 10 percent or more compared to prior cycles, even as intent signals and engagement remain strong.

The familiar plays, broad intent activation, increased ad spend, content syndication at volume are not producing pipeline at the pace the business needs. That is not a failure of execution. It is a signal that the underlying approach needs to change.

The issue is not a lack of activity. It is that most programs are converting fewer of the right accounts than they should.

The gap is not a data problem. It is a signal completeness problem. Most programs are reaching accounts that appear to be active. They are not reaching the accounts that are structurally positioned to convert. This report explains the difference, and how to close it.

Executive Summary

This is not primarily an execution problem. It is a conversion model problem. Many B2B organizations are generating engagement activity that is not translating into pipeline at the expected rate, even as intent signals and marketing activity remain high. This report explains why that gap exists, what the conversion data shows when it is corrected, and what the shift is worth in pipeline impact.

The pattern behind that pipeline slowdown is consistent. Demand generation programs produce strong engagement metrics and weak pipeline conversion. The conventional response is to add more signals, a new platform, or a higher-quality data provider. These interventions help at the margin. They do not solve the core problem.

The core problem is that intent data, even high-quality intent data, answers only one question: is this account researching your category? It does not answer the question that actually determines conversion: does this account have the structural conditions to buy this cycle?

If you are using intent data or an ABM platform and still seeing strong engagement but weaker-than-expected pipeline conversion, you are experiencing the Winnability Gap, the gap between accounts that are active and those that are actually positioned to convert.

In a DemandScience analysis of 5,903 companies evaluating solutions in one enterprise software category with consistent buying patterns, the accounts showing the strongest conversion potential were evaluating across multiple categories simultaneously, combining intent research with technographic signals and active vendor comparison behavior. The specific category could have been cybersecurity, CRM, HR software, or ERP. The behavioral pattern is consistent: accounts that evaluate across categories are approaching the problem as a system decision rather than a tool selection. Those accounts are not just active. They are structurally positioned to move. That multi-signal pattern is what the Winnability framework is built to identify.

This report defines the Winnability Gap, explains the four signals that close it, introduces a readiness dimension that most programs miss entirely, and provides a scenario model that quantifies what moving from a broad intent program to a Winnability-filtered portfolio is actually worth in pipeline dollars.

DemandScience's 2026 research across 750 senior marketing leaders puts numbers on the problem:

87%

of orgs chase intent signals that don't convert

26%

of intent signals ever reach qualified pipeline

25%

of marketing budget wasted on non-converting spend

Source: DemandScience 2026 State of Performance Marketing (n=750 senior marketing leaders)

The pattern is consistent. Most programs are generating activity, but that activity is not translating into pipeline at the expected rate. The issue is not signal volume. It is signal completeness.

How to read the numbers in this report

This report makes two kinds of quantitative arguments. Some numbers describe what happens at the individual account level as signal completeness increases. Others describe what that produces across a full program portfolio. They are related but they are not the same number answering the same question. Conflating them is one of the most common ways demand generation programs misread their own performance. Section 5 shows explicitly how they connect.

The most important metric in this report is the 3-4x pipeline improvement. The rest of the data explains why that happens and how to achieve it.

Section 1

The Strategic Flaw at the Center of Modern Demand Generation

Intent signals tell you what companies have one or more people who are researching your category. Winnability tells you which of those accounts will actually convert.

Most demand generation programs treat these as the same question. They are not. An account that is researching your category but is locked into a multi-year incumbent contract, has no active budget cycle, and has no internal champion pushing for change is not a winnable account regardless of how many intent signals it fires. It is active. It is not convertible.

The Winnability Gap is the distance between the accounts showing intent and the accounts that are structurally positioned to convert this cycle. Every program that activates against a broad intent list without a winnability filter is spending the majority of its budget in that gap.

Across thousands of in-market accounts, only a small fraction are actually positioned to convert. The gap between them is not a data quality problem. It is a signal completeness problem.

Three forces have widened the gap over the last two years:

Intent data is not a single signal type

Intent data is a category, not a source. Bidstream data, website visitor tracking, review site research behavior, and content download patterns all fall under the intent umbrella but they are measuring fundamentally different things. A single individual landing on your website has dozens of possible explanations. Multiple team members spending hours comparing vendors on a peer review site, researching pricing, and reading competitor reviews is a qualitatively

different signal. Not all intent is equal, and programs that treat it as uniform will activate against a lot of noise.

Platform complexity without outcome accountability

Organizations using 11 or more marketing tools now account for 66% of the market. More tools creates more signals to process but not more pipeline. High performers use 18% fewer tools and waste 7% less budget. The complexity is not producing better targeting. It is producing more sophisticated noise.

The unbundling trap

As the conventional ABM platform model breaks down and buyers move toward best-of-breed combinations or AI-native point solutions and tools, the winnability filter frequently gets lost in the transition. Every tool does its job. Nobody is accountable for whether the combination reaches the accounts that actually matter.

The economics of the current model

Underlying all of this is a structural incentive problem. Seat-based platform pricing scales with access and usage, not with pipeline outcomes. Organizations pay more as they do more, regardless of whether performance improves. A model that rewards activity will produce activity. Winnability-based activation is built around a different accountability standard: outcomes, not inputs.

The difference between these two approaches is not incremental. A static model targets a fixed list and optimizes after the cycle ends. A dynamic model continuously reprioritizes based on technographic fit, readiness triggers, and active buyer behavior. The result is not just more efficient targeting, but a fundamentally different conversion profile.

Section 2

Why Intent Alone Is No Longer Enough

Intent data answers one question: is this account researching your category? That is a valuable question. It is not sufficient to activate against on its own.

The right question is: of the accounts researching our category, which ones are structurally positioned to convert this cycle? Answering that question requires four signals. Most programs are collecting one.

Across DemandScience managed programs, we observe three distinct performance tiers based on signal completeness: intent-only targeting, intent plus technographic fit, and a full model that also incorporates timing signals and active vendor comparison behavior. The performance differences between these tiers are structural, not incremental.



Signal 1 Intent Quality

Verified peer review research behavior: pricing comparisons, feature evaluation, competitive reviews. Not bidstream. Not anonymous page views.

Is this account doing serious research, or casual browsing?



Signal 2 Technographic Fit

Current tech stack, first use dates, usage intensity trends, competitive vendor relationships, and talent pool signals that indicate displacement readiness.

Is something happening at this account that creates urgency to change?



Signal 3 Readiness Triggers

Executive turnover or new hires, M&A activity, regulatory requirement changes, budget reallocation announcements, financial distress or underperformance. Events that precede purchasing decisions.

Does their current stack create an opening or lock them in?



Signal 4 Active Comparison

Behavioral evidence of vendor shortlisting: comparing 3+ vendors simultaneously, pricing research, feature comparisons, peer validation on review sites.

Are they building a shortlist right now?

Reading the progression: intent signal alone produces ~2% pipeline conversion. Layer in technographic fit (Propensity-Based Leads, or PBL) and conversion rises to ~15%. Add readiness triggers and active comparison behavior (In-Market Buyer Leads, or IML) and conversion reaches ~25%. That 12.5x lift is the economic case for signal completeness.

Section 2

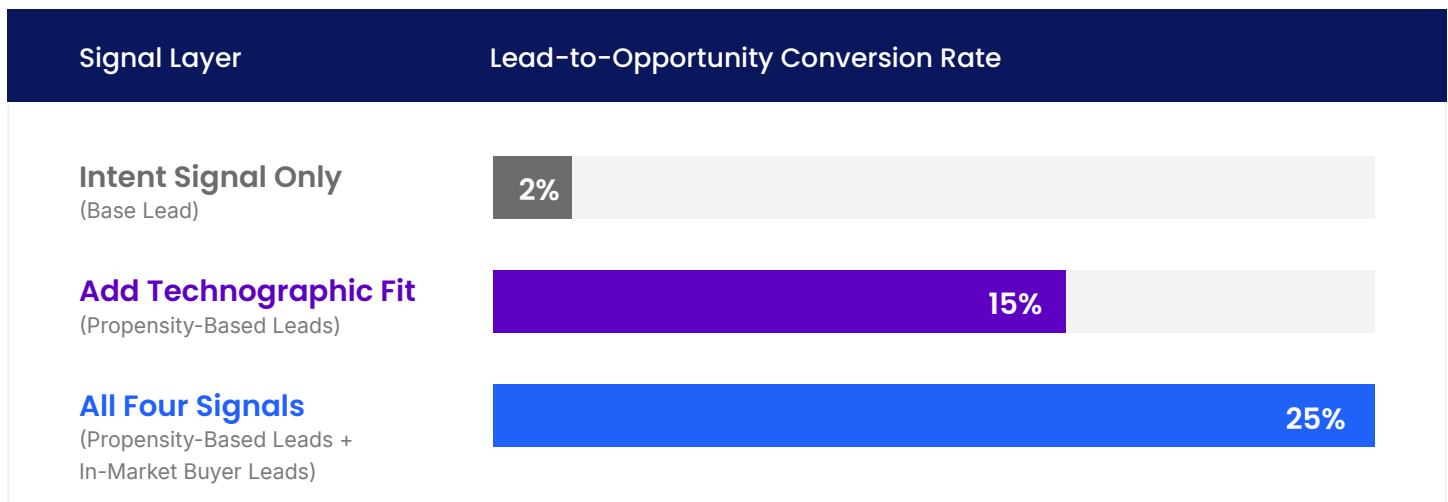
Why Intent Data Alone Cannot Close the Gap

The signal most programs are missing: Readiness Triggers

While technographic signals identify structural opportunity, readiness triggers identify timing. An executive hire that brings in a new technology philosophy, an M&A event that creates integration urgency, a regulatory change that forces a platform evaluation, or a publicly announced

strategic shift creates the compelling event that precedes a purchasing decision. When combined with intent and technographic signals, readiness triggers indicate not just who is winnable but why the window is open right now.

The conversion data makes the signal completeness argument concrete:



These benchmarks reflect observed performance differences across programs with different levels of signal completeness, not theoretical projections.

12.5x Conversion lift from intent-only to all four signals.

That is the economic case for signal completeness.

Source: DemandScience managed program benchmarks comparing intent-only, propensity-filtered (PBL), and multi-signal activation models incorporating technographic fit, readiness triggers, and active comparison behavior

Section 3

The Winnability Framework: Identifying Accounts Positioned to Convert

Winnability is not a binary. It is a score, and that score changes over time as signals strengthen, timing windows open, and competitive situations evolve. The framework below translates the four-signal model into a practical qualification layer that can sit on top of any intent data source.

Not all accounts deserve the same investment. This framework tells you which ones do, based on four signals that together determine whether an account is structurally positioned to convert this cycle.

Signal	Strong <i>3 points</i>	Moderate <i>1 point</i>	Weak <i>0 points</i>	DS Data Source
Intent Signal	Researching 2+ high-signal categories over 15+ active days	Single category, 5-14 active days	Single category, fewer than 5 days	TrustRadius behavioral data
Technographic Fit	Competitor installed; end-of-life signals or shrinking talent pool; spend increasing in adjacent categories	Adjacent technology; some overlap; spend stable	No competitive overlap; incumbent contract strong	HG Insights
Readiness Triggers	Executive hire/turnover, M&A activity, regulatory change, budget reallocation announced	New initiative signaled; team restructure visible	No trigger events detected	HG Insights timing signals
Active Comparison	Comparing 3+ vendors; shortlist behavior visible; pricing research active	Evaluating 1-2 vendors; some comparison	Background research only	TrustRadius + G2

Note: Competitive timing in this framework focuses on technographic indicators of vendor relationship strength, usage intensity trends, and end-of-life signals rather than contract renewal dates, which are rarely available outside public sector procurement.

Tier 1 accounts convert at roughly 25%. Tier 3 converts at roughly 5%. The activation approach, budget allocation, and content strategy should reflect that difference. Treating all tiers the same is one of the most reliable ways to waste a good targeting model.

The Winnability Tier System

Not all in-market accounts are equally ready to buy. Use the Winnability Score to prioritize your investments and align the right activation approach to each tier.

Tier	Conversion Rate	What It Means	Activation Approach
Tier 1 Winnable Now Score: 10-12 Higher Priority Higher Conversion & Urgency	 ~25%	All four signals strong. Shortlist being build. Delay has a real cost.	Direct personalized outreach within 24-48 hours informed by technographic and readiness context. This is deal acceleration.
Tier 2 Winnable Soon Score: 6-9	 ~15-20%	Multi-signal strength with timing gap. Window is opening	Content syndication as primary motion. SDR sequence triggered on engagement. Display running simultaneously.
Tier 3 Monitoring Score: 10-12 Lower Priority Lower Conversion & Urgency	 ~5-15%	Intent present, other signals developing. Watch for strengthening.	Display advertising and category-aligned content syndication. Monitor for score improvement.
Tier 4 Not Yet Actionable Score: 10-12	 ~2%	Activity without structural readiness.	Broad presence only. No direct outreach budget. Build visibility before the evaluation cycle begins.

✦ KEY TAKEAWAY

Scores combine intent, technographic fit, readiness, and active comparison behavior to surface accounts most likely to convert this cycle. Invest more where conversion potential is high. Nurture the rest. Ignore the bottom.

Recency matters as much as depth

A Tier 1 Winnable account is time-sensitive. An account scoring 10 today may score 2 in 90 days because the decision was already made. Sustained multi-week research across multiple categories, combined with visible readiness triggers, is the behavioral signal that a shortlist is being built right now. That is when activation lag has the highest cost.

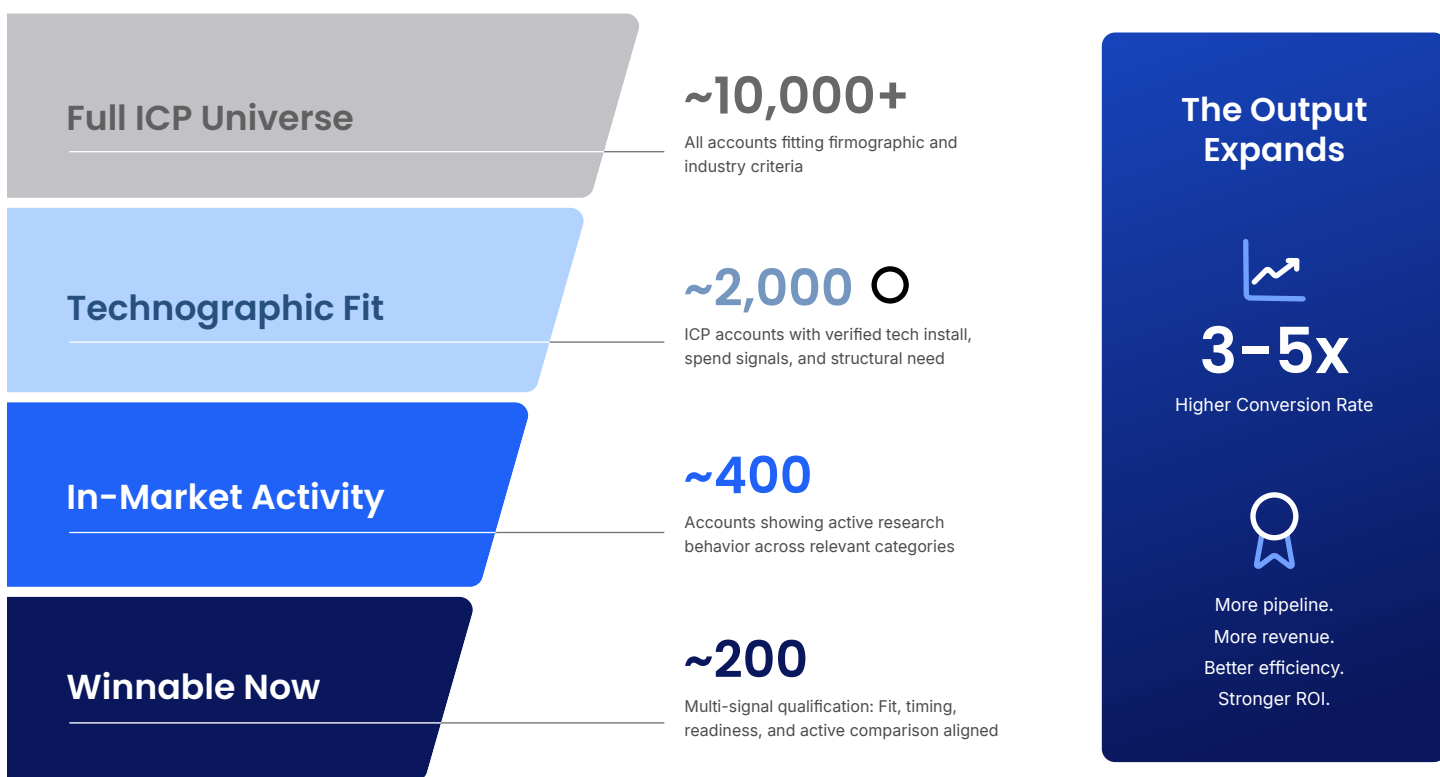
Section 4

What Signal Completeness Does to Your Funnel, and Your Pipeline

The Winnability framework fundamentally reshapes the funnel when applied to a real ICP. The numbers below are illustrative, showing how volume decreases while conversion increases. Actual counts will vary by ICP size, category, and market maturity.

The Winnability Tier System

From the full ICP universe to actively winnable accounts.



KEY TAKEAWAY

Focus isn't just efficiency. It's effectiveness. <1% of accounts drive the majority of pipeline outcomes.

The pipeline implication of this funnel is significant. Most broad intent programs activate against the second or third tier of this funnel. Winnability-filtered programs activate against the fourth. The account list is shorter. The conversion rate is dramatically higher. The pipeline output at comparable or lower spend is meaningfully better.

The goal of winnability filtering is not a longer list. It is a shorter one, with a fundamentally different conversion rate.



Section 5

The CFO Conversation: What Closing the Winnability Gap Is Worth

The question most demand generation leaders cannot answer clearly is: *what is the economic difference between our current program and a Winnability-filtered alternative?*

The 12.5x conversion lift represents the ceiling at the individual account level. The 3-4x pipeline improvement reflects a balanced program across tiers. Both numbers are real. They are answering different questions.

Confusing these levels is one of the most common ways demand generation programs misdiagnose performance.

A Balanced Portfolio Model for Pipeline Generation

This model reflects a balanced portfolio approach rather than a single program. Investment is distributed across signal tiers with different volumes and conversion profiles, and the outcome comes from the mix. In this modeled scenario, that mix produces roughly 3.5x more pipeline from the same budget at a \$50K average deal size.

A Balanced Portfolio Model for Pipeline Generation

Not all programs convert at the same rate. A balanced portfolio that includes broad reach, precision targeting, and in-market acceleration delivers the highest pipeline from the same total investment.

The Result: A balanced portfolio generates **3-4x more pipeline** than a broad intent program alone.

INDIVIDUAL PROGRAM PERFORMANCE

Same total investment applied to individual program types

Program Type	Broad Intent	PBL	PBL + IML
Description	Volume at the top of the funnel	High-fit accounts with strong signals	High-fit accounts in-market now
Leads	1,000	400	200
Conversion Rate	2%	15%	25%
Opportunities (Est.)	20	60	50
Pipeline (Est.)	\$1.0M	\$3.0M	\$2.5M

Balanced Portfolio Outcome

Strategic mix of programs maximizes pipeline output

BALANCED PORTFOLIO

The right mix of reach, precision, and in-market acceleration delivers the highest pipeline.

\$2.5M (71%)

PBL + IML

\$0.7M (20%)

PBL

\$0.3M (9%)

Broad Intent



\$3.5M

Total Pipeline



700

Total Leads



~10%

Overall Conversion

ACV assumption: \$50K. Conversion rates from DemandScience managed program benchmarks. Individual results will vary by ICP, sales execution, and market conditions.



KEY TAKEAWAY

No single program maximizes pipeline. A balanced portfolio across program types delivers the highest pipeline output from the same investment.

The balanced portfolio row is the most important line in this table. It does not optimize for conversion rate alone or for volume alone. It serves all three stakeholders simultaneously: Marketing gets coverage and attribution from the Tier 3 display and content programs. Sales gets high-conversion Tier 1 and Tier 2 leads. Finance gets the best overall pipeline ROI.

What moving from Low to Median performance is worth

The HG Insights benchmark data indicates that companies applying technographic and spend intelligence to account prioritization can see materially higher conversion rates, along with significant revenue lift.

To model this against your own program, three inputs are sufficient: your current lead volume, your current pipeline conversion rate, and your average ACV. The delta between your current conversion rate and the Tier 1 or balanced portfolio benchmark is the economic case for winnability filtering.



Section 6

Translating Signal Intelligence Into Pipeline

Identifying winnable accounts changes who you target. Activation determines whether you convert them before your competitors do. The two are sequential and inseparable. A Winnability score without an activation model is a prioritized list, not a program.

The activation model follows the Winnability score. Each tier requires a different approach, different content, and a different accountability model. The table below maps each tier to the right activation motion. Applying the same campaign across all three tiers is one of the most common ways good targeting produces mediocre results.

What most programs do

- Apply same campaign to all intent accounts
- Optimize for lead volume not conversion quality
- Treat all intent signals as equivalent
- No differentiation by timing or readiness
- Sales gets undifferentiated lists

What a Winnability-based program does

- Activate differently by tier and signal strength
- Optimize for pipeline not lead count
- Weight signals by quality and recency
- Prioritize accounts with readiness triggers
- Sales gets context, not just contacts

Signal	Profile	Activation	Content Approach
Tier 1 Score 10-12	All four signals strong. Shortlist being built now.	Personalized outreach within 24-48 hours informed by specific technographic context and readiness triggers. Coordinated content syndication and display running simultaneously against the same account.	Reference their specific research categories and competitive context. Lead with the Winnability Gap report as a follow-up asset. They will recognize their own situation in it.
Tier 2 Score 6-9	Multi-signal strength. Evaluation in progress.	Content syndication as primary motion. SDR sequence triggered on engagement. Display running against the same account list.	Winnability framework as the primary offer. Lead with the four-signal model. Follow with a Winnable Accounts Snapshot CTA.
Tier 3 Score 3-5	Intent present. Readiness developing.	Display advertising to build presence. Category-aligned content syndication. Monitor for score improvement.	Educational content matched to research categories. Build authority before the shortlist forms.

Section 7

Measuring Pipeline Efficiency, Not Activity

Measuring a Winnability-based program by lead volume will make it look worse than it is. A Winnability-filtered program produces fewer leads than a broad intent program. Those leads convert at a dramatically higher rate. Here is what to measure instead:

Metric	Why It Matters
Account Progression Rate	What percentage of Tier 3 accounts moved to Tier 2 or Tier 1 within 60 days? This measures whether your content and display program is accelerating buying cycles.
Signal-to-Meeting Conversion	Of accounts that reached Tier 1, what percentage accepted a meeting or responded to outreach? This is the real test of signal quality.
Lead-to-Pipeline Conversion	Of meetings generated, what percentage became qualified pipeline? Winnability-based programs should outperform broad intent programs significantly on this metric.
Cost per Winnable Account	Total program spend divided by accounts that reached Tier 1 score. More useful than CPL for measuring program efficiency.

Section 8

The Framework in Action

The following result was produced by applying Winnability principles in practice: multi-signal account qualification, coordinated execution across channels against the same account list, and accountability for pipeline outcomes rather than lead volume.

Fortune 500 Enterprise:

**\$475M
Pipeline in
6 Months**

The result did not come from a larger account list. It came from better qualification, coordinated execution, and accountability for pipeline not impressions.

50,364 total intent activities across 6 categories and 6 products. 22,557 target accounts reached. 19,781 verified leads delivered. \$475M pipeline generated in 6 months. Highest scored lead source. 5x repeat customer.

- Signal 1:** 50K+ TrustRadius intent activities across 6 categories and 6 products.
- Signal 2:** ICP intelligence filtering for technographic fit.
- Signal 4:** Contact opt-in via TrustRadius premium content confirming active vendor evaluation.

The Bottom Line

Most demand generation programs are not underperforming because of poor execution, weak creative, or the wrong channels. They are underperforming because the underlying model was designed to optimize for activity rather than conversion. That is a strategic problem, not one solved by another tool or more budget applied to the same approach.

The Winnability Gap is the distance between the accounts showing intent and the accounts that are structurally positioned to convert this cycle. Every dollar spent activating against that gap is waste. Every dollar spent against a genuinely winnable account compounds.

The accounts in your market that are winnable this cycle are already in motion. The question is whether you identify them before your competitors do.

Organizations that apply Winnability-based filtering to their demand programs consistently see 3 to 4x more pipeline from the same budget, with sales cycles that run significantly faster.

The frameworks in this report show how. The scenario model in Section 5 lets you calculate what it means for your specific program.

Close Your Winnability Gap

Your highest-converting accounts are already in motion. The Winnability Gap is the distance between where your programs are reaching them and where the conversion actually happens.

DemandScience is a global leader in B2B performance marketing as a service, helping companies cut through misleading data and drive measurable pipeline and revenue outcomes.

The organizations seeing the strongest pipeline efficiency improvements are combining intent activity with technographic fit, readiness signals, and active buyer evaluation behavior to identify the accounts most structurally positioned to convert. The Winnability framework is designed to operationalize that shift.

Get Your Winnable Accounts Snapshot

See which accounts in your market are not just in-market, but actually winnable right now.

demandscience.com/winnable-accounts

Research Sources:

DemandScience 2026 State of Performance Marketing (n=750 senior marketing leaders, \$100M+ revenue organizations, October 2025). TrustRadius Category Intent Data, 90 days ending February 24, 2026. HG Insights technographic and conversion benchmark data.

Fortune 500 customer result as reported by the customer's marketing leadership. Individual results will vary.

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