Connecting Marketing & Sales: The Signal Exchange Playbook

A WORKPLACEAI STRATEGY PLAYBOOK

From Functional Silos to a Continuously Connected Revenue System

Automating a function makes that function more efficient. Connecting functions makes the system more intelligent. This is the framework for what should move between marketing and sales, and why.

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Key Takeaways

- Every marketing and sales function produces information that could make another function smarter. In most organizations, those signals stay trapped inside the function that generated them. That's the problem the Signal Exchange is built to solve.
- A signal is not the same as data. Data describes something that happened. A signal indicates that something meaningful may be happening, and that someone should potentially act on it. The Signal Exchange should move meaningful signals, not indiscriminate data.
- The core framework repeats across every function pair: Function → Signal → Shared Intelligence → Next Function → Outcome → Feedback. The feedback becomes a new signal, and the loop continues.
- Signal Exchange is not data integration. Two systems can exchange millions of records and still provide little intelligence. The goal isn't maximum data movement, it's maximum decision value.
- Once teams discover AI can detect signals everywhere, they tend to try to monitor everything. That creates signal overload, thousands of alerts that produce noise instead of intelligence. The fix is prioritization, not more monitoring.

- A competitor can buy the same AI model. It can't instantly reproduce your accumulated customer intelligence, your historical signal patterns, or your cross-functional learning loops. That's what makes a connected intelligence architecture a compounding advantage rather than a temporary one.

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Marketing and Sales do not operate independently. They may have different teams, technologies, objectives, workflows, and metrics, but they are constantly influencing one another. Marketing generates demand signals. Sales generates customer and opportunity intelligence. Content reveals what buyers care about. Customer conversations reveal what they do not understand. Competitive intelligence reveals how the market is changing. Campaign performance reveals which messages resonate. Win/loss analysis reveals why opportunities move forward, or disappear.

Every function is producing information that could make another function smarter. Yet in many organizations, those signals remain trapped inside the function that generated them. That is the problem the **Signal Exchange** is designed to solve.

The objective is not simply to integrate systems or synchronize databases. It is to create a continuous flow of intelligence across Marketing and Sales so that the output of one function becomes a meaningful input to another.

The core framework is:

> **Function → Signal → Shared Intelligence → Next Function → Outcome → Feedback**

This creates a fundamentally different operating model. Instead of Marketing → Handoff → Sales, the organization moves toward:

> **Marketing ↔ Sales ↔ Customer ↔ Market ↔ Intelligence**

The result is a connected revenue system in which every meaningful interaction has the potential to improve what happens next.

The Missing Layer in AI Transformation

The first stage of AI transformation is usually functional. Organizations ask how to automate lead generation, content creation, email, sales research, competitive intelligence, reporting. These are useful questions. But they focus on the individual functions. The more important question is:

> *What does each function learn, and who else needs to know?*

A content team may learn that a particular topic is generating exceptional engagement. That is a signal. Sales may discover that prospects repeatedly object to a particular product capability. That is a signal. Competitive Intelligence may discover that a competitor has changed its positioning. That is a signal. Marketing may discover that a particular account has suddenly increased its engagement. That is a signal.

None of these signals creates maximum value if it remains isolated. The Signal Exchange turns isolated observations into organizational intelligence.

What Is a Signal?

A signal is not simply data. Data describes something that happened. A **signal** indicates that something meaningful may be happening, and potentially that someone should do something about it.

A pageview is data. A sudden increase in high-intent visits from a target account may be a signal. An email open is data. A sustained increase in engagement across a buying committee may be a signal. A competitor published a product announcement, that's information. A competitor's announcement changing its positioning in a category where your company is actively competing, that's a competitive signal. A salesperson records an objection, that's information. The same objection appearing repeatedly across high-value opportunities becomes a market signal.

> *The Signal Exchange should move meaningful signals, not indiscriminate data.*

AI can help determine which observations are significant, what they mean, and what should happen next.

The Signal Exchange Framework

Every cross-functional intelligence loop can be described through six stages.

THE SIX STAGES

Function: Where does the intelligence originate?
Signal: What meaningful observation does the function generate?
Shared Intelligence: How is that signal interpreted in the broader business context?
Next Function: Who can act on that intelligence?
Outcome: What happened as a result?
Feedback: What did the outcome teach the system?

The complete loop is:

Function → Signal → Shared Intelligence → Next Function → Outcome → Feedback

Then the feedback becomes a new signal. The process repeats. This creates a continuous intelligence cycle rather than a one-time handoff.

Signals Are the Currency of the Connected Revenue System

In a traditional organization, information often moves through meetings, reports, email, dashboards, and manual handoffs. These mechanisms are slow. They also encourage information to remain organized around departments. The Signal Exchange creates a different model.

Instead of asking what report Marketing should send Sales, the organization asks what signal Sales needs from Marketing to make a better decision, and what signal Marketing needs from Sales to make a better decision. That changes the design of the relationship.

What Marketing Might Provide

Account engagement, intent signals, content consumption, campaign response, audience trends, emerging topics, market interest.

What Sales Might Provide

Objections, buying criteria, competitive mentions, deal-stage intelligence, customer priorities, win/loss patterns, account-specific intelligence.

Both sides become intelligence providers. Both sides become intelligence consumers.

The Architecture of a Signal Exchange

A mature Signal Exchange has several components.

COMPONENTS

Signal Source: The function where the observation originates.
Signal Detection: AI or automation identifies meaningful changes or patterns.
Signal Interpretation: The system determines what the signal may mean.
Context Enrichment: Additional customer, account, market, competitive, or historical information is added.
Intelligence Distribution: The insight reaches the function or person that can act on it.
Action: The receiving function responds.
Outcome Measurement: The system determines what happened.
Feedback: The outcome improves future signal interpretation and action.

This produces:

Observe → Interpret → Contextualize → Exchange → Act → Measure → Learn

The important word is **exchange.** The objective is not to create another reporting pipeline. It is to create a living flow of intelligence.

Example: Content → Engagement → Sales → Objection → Content

One of the most powerful Signal Exchanges begins with content. Consider a buyer researching a complex technology category. They encounter a piece of content. They return repeatedly. They consume related material. They engage with a comparison page. They eventually request more information.

A traditional Marketing organization might record those activities as engagement metrics. A connected organization treats them as intelligence. The loop becomes:

Content → Engagement → Lead Intelligence → Sales → Objection → Content

HOW IT WORKS

Content: Marketing creates content around a customer problem, category, product capability, or buying question.

Engagement: The system observes who is engaging, what they consume, how frequently they return, and what topics appear to matter.

Lead Intelligence: AI combines engagement with account, role, intent, and historical information. A previously anonymous audience signal may become a meaningful account-level signal.

Sales: The intelligence reaches Sales as context, not just a notification. Instead of "John downloaded a whitepaper," the system can provide: "This target account has shown increasing engagement with migration, security, and implementation content over the past three weeks." That is actionable intelligence.

Objection: Sales engages the account and discovers an objection, perhaps implementation complexity, differentiation from a competitor, or integration requirements. The objection becomes a new signal.

Content: Marketing receives the aggregated signal. If the objection is recurring, it becomes a content opportunity, an implementation guide, comparison content, FAQs, technical explainers, customer stories, or sales enablement content. The new content generates new engagement. The loop continues.

Content is no longer merely published. It learns from Sales. Sales is no longer merely consuming Marketing output. It teaches Marketing what buyers actually need.

Example: Competitive Intelligence → Positioning → Sales → Win/Loss

A second powerful exchange connects Competitive Intelligence to the entire revenue system.

Competitive Intelligence → Positioning → Content → Campaign → Sales → Win/Loss → Competitive Intelligence

Consider a competitor introducing a new capability.

HOW IT WORKS

Competitive Intelligence: The system detects the change, analyzing product announcements, website changes, messaging, pricing signals, customer commentary, analyst coverage, executive statements, and market activity. The important question is not merely what changed, it's what the change means for market position and active opportunities.

Positioning: Marketing and Product Marketing evaluate whether the competitive change requires a response, a new category narrative, a new target buyer, or an exposed weakness in your positioning. The system generates a positioning recommendation.

Content: Content translates the positioning into useful market-facing material, comparison content, thought leadership, solution pages, battle cards, customer stories, objection-handling content, competitive landing pages.

Campaign: Demand Generation incorporates the new message into campaigns. Target accounts may receive messaging specifically addressing the competitive issue.

Sales: Sales receives the intelligence. Reps see updated competitive context and recommended talking points, and use that intelligence in active opportunities.

Win/Loss: The organization measures what happened. Did the new positioning improve competitive win rates? Did objections change? Did opportunities progress? Why were deals won or lost?

Competitive Intelligence: Win/loss information returns to Competitive Intelligence. The original competitive hypothesis can now be tested against actual market behavior. The loop begins again.

This is competitive intelligence transformed from a research function into a **continuous revenue intelligence function.**

Other High-Value Signal Exchanges

The two examples above illustrate the principle, but the architecture can support dozens of cross-functional loops. The objective is not to automate every possible exchange. It is to identify the exchanges with the greatest potential business value.

Search → Content → Demand → Sales → Buyer Questions → Search

Search behavior reveals questions buyers are asking. AI identifies emerging topics, changes in search intent, content gaps, and opportunities. Content responds. Demand generation distributes the resulting material. Sales receives intelligence about what prospects are researching. Sales conversations reveal additional questions, which return to the SEO/AEO system, a self-reinforcing market intelligence loop.

Campaign → Engagement → Account Intelligence → Sales → Pipeline → Campaign

Campaigns reveal which audiences respond, which messages resonate, which accounts engage, and where interest is increasing. AI combines those signals into account and audience intelligence. Sales receives prioritized intelligence. Pipeline outcomes then inform future campaign strategy. Marketing learns from Sales, Sales benefits from Marketing.

Sales Conversation → Objection → Intelligence → Content → Sales Enablement → Sales

AI can analyze conversations at scale to identify recurring objections, questions, concerns, competitive references, buying criteria, and pricing concerns, patterns individual representatives may not see. Those patterns influence content, FAQs, product messaging, battle cards, training, and campaigns. The updated material returns to Sales, which becomes both an intelligence generator and an intelligence consumer.

Customer → Usage Signal → Intelligence → Marketing → Expansion → Sales → Customer

Existing customers generate enormous intelligence: adoption, engagement, declining usage, new use cases, expansion opportunities, potential dissatisfaction. Marketing can identify relevant education or expansion opportunities. Sales can prioritize accounts. This connects acquisition, retention, and expansion into a larger revenue system.

Competitive Signal → Account Risk → Sales → Outcome → Win/Loss → Market Intelligence

Competitive intelligence can also operate defensively. If a competitor begins aggressively targeting a major account, the system evaluates account importance, opportunity status, competitive history, and relationship strength. If the risk is significant, Sales receives an alert. If the account is retained, the system learns what worked; if it's lost, the organization learns why. The system becomes predictive rather than merely descriptive.

Customer → Feedback → Product Intelligence → Product → Positioning → Marketing → Sales → Customer

Marketing and Sales should not be the end of the Signal Exchange. Customer conversations may reveal missing capabilities, usability problems, integration requirements, or emerging use cases that inform product priorities. Product changes then influence positioning, content, campaigns, and sales enablement, where Marketing and Sales intelligence begins contributing to the broader business system.

Signal Exchange Is Not Data Integration

This distinction deserves emphasis. A data integration connects systems. A Signal Exchange connects **meaning.** Two systems may exchange millions of records and still provide little intelligence. The objective is not maximum data movement. It is maximum decision value.

A useful Signal Exchange asks: What changed? Why does it matter? Who needs to know? What should happen next? What happened after the action? What did we learn? That is fundamentally different from simply synchronizing databases.

From Data to Signal to Intelligence

The transformation can be expressed as:

Data → Signal → Context → Intelligence → Decision → Action → Outcome

Each stage adds meaning. Data: something happened. Signal: something meaningful may be happening. Context: we understand the surrounding circumstances. Intelligence: we understand what the signal likely means. Decision: we determine what should happen. Action: the organization responds. Outcome: we observe the result. The outcome becomes new data, and the cycle begins again.

AI becomes particularly powerful because it can help perform this transformation continuously and at a scale that humans cannot easily match.

Designing Better Signals

Not every signal deserves to enter the shared intelligence system. Poorly designed signals create noise. A useful signal should generally be six things.

Relevant

It matters to a meaningful business objective.

Timely

It reaches the recipient while action is still useful.

Contextual

It includes enough information to understand its significance.

Reliable

The underlying information is sufficiently trustworthy.

Actionable

Someone can do something meaningful with it.

Measurable

The organization can determine whether the response produced an outcome.

This leads to a useful design test:

> *If a signal does not change a decision, trigger an action, improve understanding, or contribute to learning, it may not belong in the Signal Exchange.*

Signal Prioritization

A mature system should distinguish between different levels of importance.

Informational Signals

Useful context that does not require immediate action.

Monitoring Signals

Indications that something is changing and should be watched.

Action Signals

Signals that justify a specific response.

Escalation Signals

Signals indicating elevated business risk or opportunity.

Strategic Signals

Signals that could influence broader market, product, positioning, or business strategy.

AI can help classify and prioritize these signals. This prevents the organization from replacing information overload with AI-generated information overload. The goal is not more alerts. It is **better intelligence.**

The Role of AI in Signal Exchange

AI can participate in almost every stage of the exchange: detecting patterns, identifying anomalies, classifying signals, combining information, enriching context, summarizing evidence,

inferring likely intent, recommending actions, triggering workflows, coordinating systems, and monitoring outcomes.

But AI should not automatically determine that every signal deserves an autonomous response. Some signals require human judgment, additional validation, or organizational authority. Some may have significant consequences. This is particularly important as organizations introduce agentic systems.

> *The greater the consequence of an AI action, the greater the required oversight.*

Signal detection can often be highly automated. Signal interpretation can increasingly be AI-assisted. Signal-driven execution should be governed according to risk.

From Handoffs to Intelligence Loops

Traditional Marketing and Sales processes are built around handoffs. Marketing hands leads to Sales. Sales hands feedback to Marketing. These handoffs are usually episodic. Signal Exchanges are continuous. The difference can be expressed simply:

HANDOFF VS. SIGNAL EXCHANGE

Handoff: "Here is information for you."

Signal Exchange: "Here is a meaningful change, here is what it appears to mean, here is the context, here is the recommended next action, and here is how we will learn from the result."

That is a much more powerful operating model.

Designing the Cross-Functional Revenue Graph

A useful way to think about Signal Exchange is as a **Revenue Intelligence Graph.** Each function is a node. Each meaningful signal is an edge. The more useful connections exist between nodes, the more intelligence can flow through the organization.

Content ↕ Demand Generation ↕ Lead Intelligence ↕ Sales ↕ Customer Intelligence ↕ Revenue Operations ↕ Competitive Intelligence ↕ Market Intelligence

The objective is not to connect everything to everything. That creates complexity. Instead, organizations should identify the **highest-value intelligence pathways.**

Mapping a Signal Exchange

A practical Signal Exchange map can be created using seven questions.

1. What function generates the signal?

Identify the originating workflow.

2. What exactly is the signal?

Define the meaningful event or pattern.

3. What context is required?

Identify the customer, account, market, competitive, historical, or revenue information needed to interpret it.

4. Who needs the intelligence?

Identify the next function or decision-maker.

5. What should happen?

Define the desired action.

6. What outcome matters?

Define the business result that should be measured.

7. What does the outcome teach us?

Determine how the result feeds back into the system.

This creates a practical design pattern:

Source → Signal → Context → Intelligence → Recipient → Action → Outcome → Feedback

The Signal Exchange Matrix

Organizations can formalize these relationships in a Signal Exchange Matrix.

Source Function	Signal	Shared Intelligence	Receiving Function	Action	Outcome	Feedback
Content	High engagement with topic	Emerging buyer interest	Demand/Sales	Prioritize audience/account	Pipeline engagement	Refine content
Sales	Recurring objection	Messaging gap	Content/Marketing	Create response content	Improved objection handling	Update intelligence
Competitive Intel	Competitor positioning change	Competitive threat/opportunity	Marketing/Sales	Adjust positioning	Win rate / engagement	Update competitive model
Campaigns	Account engagement spike	Rising account intent	Sales	Prioritize outreach	Opportunity creation	Improve targeting
SEO/AEO	Emerging search topic	New market demand	Content	Create content	Search/engagement	Refine topic model
Customer	Usage change	Expansion or risk signal	Sales/Customer teams	Engage account	Retention/expansion	Improve model
Win/Loss	Competitive loss pattern	Competitive weakness	CI/Product Marketing	Adjust strategy	Improved win rate	Update positioning

The matrix becomes more valuable as the organization moves beyond documenting data flows and begins documenting **intelligence flows.**

From Signal Exchange to Orchestration

Signal Exchange is the foundation for orchestration. Once the system understands what is happening, why it matters, who should respond, and what outcome matters, AI can begin coordinating multiple functions. Consider a high-value account showing increased buying intent. The system might detect the engagement change, enrich the account, assess intent, identify relevant content, determine whether Sales should be alerted, generate an account briefing,

recommend a sales action, adjust marketing engagement, monitor the account, and evaluate the outcome.

No single function owns the entire workflow. The intelligence connects them. This is the beginning of **AI orchestration.**

The Emergence of Agentic Signal Exchange

Agentic AI makes the Signal Exchange even more powerful. A conventional workflow may wait for a specific trigger. An agent can pursue an objective, for example: identify high-value accounts showing meaningful changes in buying intent and coordinate the appropriate response.

An agent could observe account activity, reason about whether the change is meaningful, research the account and market context, determine the appropriate response, plan the required actions, coordinate Marketing and Sales workflows, execute within its authority, monitor the outcome, and adapt based on what happens.

Objective → Observe → Reason → Plan → Act → Monitor → Adapt

But agentic systems should operate within defined boundaries. Not every cross-functional workflow should become autonomous. Some actions should require human approval. Others can be automated safely. The appropriate level of autonomy should be determined by risk, reliability, business impact, and governance requirements.

Governance of the Signal Exchange

A connected intelligence system introduces new governance considerations. The more systems exchange information, the more important it becomes to establish clear rules. Organizations should determine ten things.

GOVERNANCE QUESTIONS

- Who owns the signal? Who is authorized to interpret it? Who can act on it?
- What data can be shared? How long can information be retained?
- What decisions require human approval? How are AI recommendations validated?
- How are erroneous signals corrected? How are actions audited?

- What happens when an AI system makes the wrong inference?

Security and privacy must be considered throughout the architecture. A signal exchange should not become an excuse to make every piece of customer or employee information available to every system.

> *Share the intelligence necessary to improve the decision, not unlimited data simply because it is technically available.*

Avoiding the Signal Explosion

There is a danger in building a connected organization. Once teams discover that AI can detect signals everywhere, they may attempt to monitor everything. That creates a new problem: **signal overload.** Thousands of alerts do not create intelligence. They create noise.

The solution is prioritization. A mature Signal Exchange should continuously ask: Is this signal meaningful? Is it sufficiently reliable? Does someone need to act? Is the timing important? What is the likely business impact? Can the system learn from the outcome?

The objective is not to maximize signal volume. It is to maximize **signal-to-decision value.**

A Practical Signal Exchange Roadmap

Organizations can begin without redesigning the entire revenue architecture, across eight phases.

Phase 1: Identify the Highest-Value Loops

Start with three to five cross-functional workflows that clearly affect revenue. Don't begin with dozens of exchanges, begin with the ones where better intelligence can produce measurable value.

Phase 2: Map the Existing Flow

Document where the signal originates, how it's detected, who receives it, how it's interpreted, what action occurs, and where the process breaks. This often reveals the organization already has valuable signals, they simply aren't moving effectively.

Phase 3: Improve Signal Quality

Define what constitutes a meaningful signal. Reduce noise. Add context. Establish thresholds, confidence levels, and clear escalation rules.

Phase 4: Automate Signal Detection

Use AI and automation to identify meaningful changes at scale, across behavioral patterns, content engagement, search trends, account activity, competitive changes, and win/loss patterns.

Phase 5: Create Shared Intelligence

Move beyond "something happened" toward "something meaningful happened, here is what it likely means, here is why it matters, and here is who should respond."

Phase 6: Connect the Next Function

Make the intelligence actionable. Deliver it into the workflow where the next decision occurs. Avoid creating another dashboard employees must remember to check.

Phase 7: Measure Outcomes

Track whether the exchange actually improved performance, conversion, response time, win rates, content effectiveness, competitive losses, pipeline velocity.

Phase 8: Close the Loop

Feed outcomes back into the originating system. The Signal Exchange is not complete until the organization learns from what happened.

The best Signal Exchanges deliver intelligence **where work happens.**

Measuring Signal Exchange Performance

Traditional Marketing and Sales metrics remain important. But connected systems require additional measures.

Signal Quality

Are the signals accurate, relevant, and actionable?

Signal Velocity

How quickly does a meaningful signal reach the function that needs it?

Signal Utilization

How often does the receiving function actually use the intelligence?

Cross-Functional Response Time

How quickly does the organization respond after a meaningful signal appears?

Exchange Conversion

How often does a signal lead to a meaningful action or outcome?

Loop Completion

How often does an outcome feed back into the originating or related function?

Revenue Impact

Does the Signal Exchange improve pipeline, conversion, win rate, velocity, retention, or expansion?

Learning Velocity

How quickly does the organization turn outcomes into better future decisions?

These metrics transform Signal Exchange from an abstract architecture into something measurable.

The Human Role in Signal Exchange

AI can detect and route signals. Humans provide judgment. That distinction becomes particularly important when signals are ambiguous. A system may detect a change in engagement, but a human may understand that a customer is researching a topic for reasons unrelated to a purchase. A system may detect a competitor mention, but a salesperson may know the customer has a long-standing relationship with that competitor. A system may identify an objection, but a product expert may understand that the objection reflects a deeper strategic concern.

The best architecture combines both.

AI Provides

Scale, speed, pattern recognition, and continuous monitoring.

Humans Provide

Context, judgment, relationships, creativity, and accountability.

The objective is not to eliminate human interpretation. It is to ensure humans receive the right intelligence at the right moment.

The Signal Exchange as a Competitive Advantage

Most companies will increasingly automate individual Marketing and Sales functions. AI-powered content creation will become common. AI sales research will become common. AI campaign optimization, competitive monitoring, and agents will become common. The harder capability to reproduce will be the **intelligence architecture connecting them.**

A competitor may be able to buy the same AI model. It cannot instantly reproduce your accumulated customer intelligence, your historical signal patterns, your proprietary workflows, your cross-functional learning loops, your institutional knowledge, your outcome data, your decision architecture, or the relationships among all of those elements.

That creates a compounding advantage. The longer the system operates, the more it can learn. The more it learns, the better its intelligence becomes. The better its intelligence becomes, the better its decisions can become. And the better the decisions become, the more valuable the system becomes.

The Connected Revenue Organization

The ultimate transformation is not simply better Marketing. It is not simply better Sales. It is not simply better automation. It is the emergence of a **connected revenue organization.**

In that organization, content learns from Sales. Sales learns from Marketing. Marketing learns from customers. Competitive Intelligence influences positioning. Positioning influences content and campaigns. Campaigns generate account intelligence. Sales conversations generate market intelligence. Win/loss outcomes improve competitive intelligence. Customer behavior influences expansion and retention. Every outcome can become a new signal.

The organization becomes a network of intelligence rather than a collection of departments.

Conclusion: Connect the Intelligence

The first challenge in AI transformation is automation. The next challenge is connection. Automating a function makes that function more efficient. Connecting functions makes the **system**

more intelligent.

The fundamental Signal Exchange is:

Function → Signal → Shared Intelligence → Next Function → Outcome → Feedback

The practical examples demonstrate what that means:

Content → Engagement → Lead Intelligence → Sales → Objection → Content

Competitive Intelligence → Positioning → Content → Campaign → Sales → Win/Loss → Competitive Intelligence

And those are only two of many possible intelligence loops. The objective is not to connect everything. It is to identify and engineer the connections that create the greatest business value. The transformation therefore progresses from Functional Automation to Signal Exchange to Shared Intelligence to AI Orchestration to Continuous Learning to:

Adaptive Revenue Operations

The most valuable AI system will not be the one that automates the most individual tasks. It will be the one in which **every meaningful signal has somewhere useful to go, every important action generates learning, and every function makes the others smarter.**

> *Automate the work. Connect the intelligence. Orchestrate the system. Continuously adapt.*

Where to Go From Here

This playbook covers what should move between functions. The Unified Marketing & Sales Revenue System playbook covers the full architecture, and the Automation Playbook covers what

each individual function should produce. Together, the three form a complete strategy for connected, AI-powered revenue operations.

Read the Architecture Playbook → **Read the Automation Playbook →**

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