INFINIGROW

MASTERING YOUR GTM FUNNEL:

A COMPREHENSIVE GUIDE TO UNDERSTANDING AND BUILDING B2B GTM FUNNELS

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1
INTRODUCTION

In today's competitive B2B landscape, **understanding and optimizing your Go-To-Market (GTM) strategy is crucial for success.** At the heart of this strategy lies the GTM funnel – a comprehensive framework that encompasses all customer interactions across various departments, including sales, marketing, sales development and customer success.

This guide aims to demystify the concept of GTM funnels, providing you with a deep understanding of customer journeys, touch points, and the intricate elements that make up a successful B2B GTM strategy. Whether you're a seasoned marketing professional or new to the world of B2B marketing, this guide will equip you with the knowledge and tools to enhance your GTM approach and drive better results for your business.

At the end of this guide we will provide a general workframe to help you build your own GTM funnel from scratch or improve and optimize an existing one.

2

UNDERSTANDING GTM FUNNELS

When we talk about GTM funnels, we're referring to a holistic view of the customer's journey from initial awareness to purchase and beyond. Unlike traditional marketing or sales funnels, a GTM funnel encompasses all GTM functions within a company, particularly sales and marketing, and often includes customer success as well.

Key Points TO UNDERSTAND ABOUT GTM FUNNELS

1
COMPREHENSIVE APPROACH
GTM funnels consider all touchpoints and interactions a potential customer has with your brand, products, or services.

2
CROSS-FUNCTIONAL
They involve multiple departments, ensuring a cohesive strategy across the entire customer experience.

3
B2B FOCUS
In B2B contexts, GTM funnels often involve multiple personas within a single account, reflecting the complexity of B2B buying committees.

4
DATA-DRIVEN
GTM funnels rely heavily on data and analytics to track, measure, and optimize the customer journey.

5
CONTINUOUS OPTIMIZATION
They are not static but require ongoing refinement based on customer behavior and market dynamics.

Understanding the GTM funnel allows businesses to align their efforts, create more targeted strategies, and ultimately drive better results throughout the customer lifecycle.

3

THE ANATOMY OF A CUSTOMER JOURNEY

At the core of every GTM funnel is the customer journey. This journey represents the path a potential customer takes from their first interaction with your brand to becoming a loyal customer and advocate. In B2B contexts, it's important to distinguish between individual person journeys and account journeys.

Person Journey

A person journey is built out of multiple touch points – instances where an individual interacts with your brand, product, or service. These touch points can be intentional (like clicking on an ad) or accidental (like stumbling upon your brand on a random article).

Account Journey

In B2B scenarios, an account journey is an aggregation of all customer journeys within the same company. This concept is particularly relevant for B2B GTM strategies, which often involve multiple personas as part of the buying committee.

Key Stages
OF A CUSTOMER JOURNEY

Awareness
The stage where a potential customer becomes aware of your brand or solution.

Consideration
The evaluation phase where the prospect researches and compares options.

Decision
The point at which the prospect chooses to become a customer.

Retention
Ongoing engagement and support to maintain customer satisfaction.

Advocacy
When satisfied customers promote your brand to others.

UNDERSTANDING THESE COMPONENTS HELPS IN MAPPING OUT THE VARIOUS TOUCH POINTS

and interactions that occur throughout the journey, allowing for more targeted and effective GTM strategies.

4

TOUCH POINTS: THE BUILDING BLOCKS OF CUSTOMER JOURNEYS

Touch points are the fundamental elements that make up a customer journey. A touch point is any instance where a person engages with your brand, whether initiated intentionally or encountered accidentally. These interactions form the basis of the customer's experience and perception of your company.

Definition

A **touch point** is a specific moment of interaction between a potential or current customer and your brand, product, or service.

A customer or account journey can consist of a few to hundreds of touch points, depending on the length and complexity of your buying cycle.

Importance of touch points:

1. They shape the customer's perception of your brand.
2. They provide valuable data on customer behavior and preferences.
3. They offer opportunities to influence the customer's decision-making process.
4. They help in identifying areas for improvement in your GTM strategy.

In the next section, we'll explore the various types of touch points and their specific elements.

5 TYPES OF TOUCH POINTS

In a GTM funnel, touch points can be categorized into several types, each playing a unique role in the customer journey. Understanding these different types helps in creating a comprehensive and effective GTM strategy. The main types of touch points are:

1 WEBSITE TOUCH POINTS

2 PRODUCT TOUCH POINTS

3 EXTERNAL TOUCH POINTS

4 OFFLINE TOUCH POINTS

5 SALES TOUCH POINTS

6 DARK FUNNEL TOUCH POINTS

Let's briefly explore each of these in the next page.

Website TOUCH POINTS

These are interactions that occur on your company's website. They include page visits, content downloads, form submissions, and other online interactions with your brand's digital presence.

Product TOUCH POINTS

These touch points occur when a user interacts directly with your product, typically during a trial period or after purchase. They include feature usage, in-app messages, and product-related support interactions.

External TOUCH POINTS

These are interactions that happen outside of your owned properties. They can include mentions on social media, third-party review sites, industry forums, or partner websites.

Offline TOUCH POINTS

These are physical, real-world interactions with your brand. They might include attending a trade show, receiving direct mail, or participating in a sponsored event.

Sales TOUCH POINTS

These are direct interactions between your sales team and potential customers. They can include phone calls, email exchanges, in-person meetings, and demos.

Dark Funnel TOUCH POINTS

These are interactions that occur outside of your measurable channels, often in places where you have limited visibility or control. They can include word-of-mouth recommendations, private forum discussions, messaging app chats, untracked ad impressions or content consumption on third-party platforms.

Inbound VS Outbound

Inbound touchpoints originate from prospects themselves—they initiate the contact through sources such as a Google search or an ad click. Outbound touchpoints are initiated by you, such as cold calls or outbound emails. Many companies divide inbound and outbound responsibilities between marketing (inbound) and sales (outbound). However, this separation often hinders effective go-to-market strategies. Read more about it here.

6
ELEMENTS OF A TOUCH POINT

Regardless of the type, each touch point consists of three key elements:

1 Source **DETAILS** → 2 Engagement **DETAILS** → 3 Transition **DETAILS**

Let's examine each of these elements:

6.1 Source Details

This element answers the question:
How did the prospect arrive at this specific touch point?

For a **website visit**, it might be through a paid ad, organic search, or a referral link.

For a **product touch point**, it could be through an in-app prompt or an email invitation.

For a **sales touch point**, it might be a cold call or a product demo.

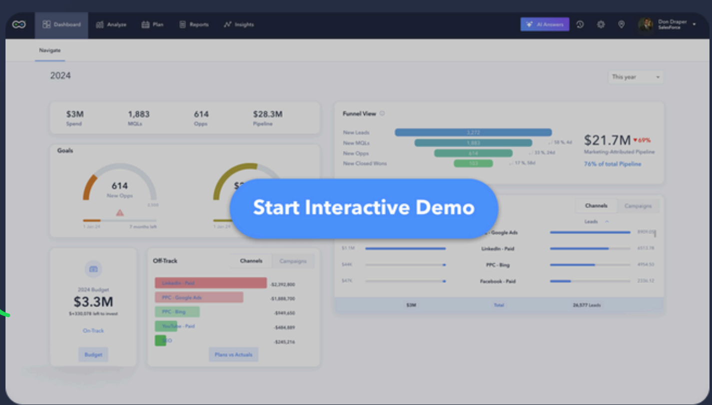
Understanding the source helps in evaluating the effectiveness of different channels and strategies in your **GTM approach**.

6.2
Engagement Details

This element describes what the prospect did once they arrived at the touch point. Examples include:

For a WEBSITE	✓ Pages visited ✓ Time spent on site ✓ Content consumed
For a PRODUCT	✓ Features used ✓ Time spent in the app ✓ Support tickets raised
For an OFFLINE EVENT	✓ Booth Visits ✓ Brochures taken ✓ Conversations had

Engagement details provide insights into what aspects of your offering are most interesting or valuable to prospects.



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6.3

Transaction Details

This element focuses on whether the prospect performed a desired action at this touch point. It could be:

- Filling out a form
- Increasing their engagement score
- Leaving their business details
- Performing a specific product activity
- Moving to the next stage in the sales process

Transition details are crucial for understanding the effectiveness of each touch point in moving prospects through the funnel.

By analyzing these elements across all touch points, you can gain a comprehensive understanding of your GTM funnel's performance and identify areas for optimization.

The **main KPI (Key Performance Indicator)** used to measure transition effectiveness is conversion rates. You can measure conversion rates between two parts of your funnel and within the whole funnel.

7

DEEP DIVE: WEBSITE TOUCH POINTS

Website touch points are often the first and most frequent interactions prospects have with your brand. They play a crucial role in attracting, engaging, and converting potential customers.

KEY COMPONENTS OF *website touch points*

7.1 Source Details

Understanding how visitors arrive at your website is crucial for optimizing your marketing efforts.

Paid Campaigns

Visitors coming from paid ads (e.g., Google Ads, social media ads)

Organic Search

Traffic from search engine results

Social Media

Visitors from social media platforms

Referral Traffic

Visitors from links on other websites

Direct Traffic

Users typing your URL directly or using bookmarks

7.2 Engagement Details

These metrics help you understand how visitors interact with your site:

Page Visits	Which pages are viewed and in what order
Time on site	How long visitors stay on your website
Content Interaction	Downloads, video views, blog post reads
Navigation Patterns	How users move through your site

7.3
Transition Details

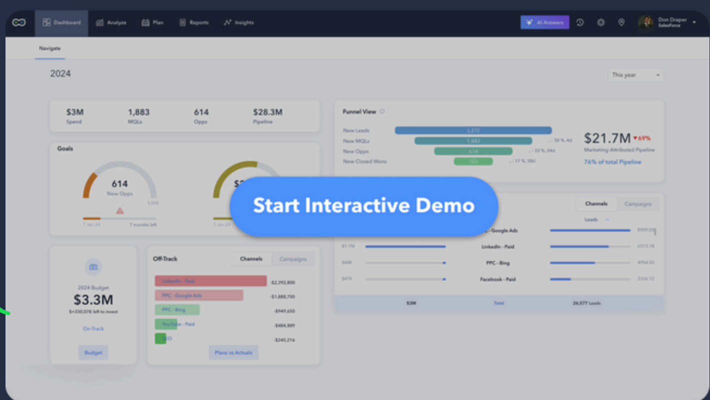
These are the actions that indicate a visitor's progression through your funnel:

Form Submissions
Contact forms, newsletter sign-ups, whitepaper downloads

Scoring Thresholds
Reaching a certain level of engagement as defined by your scoring system

Chat Interactions
Engaging with chatbots or live chat

Product-Sign Ups
Starting a free trial or demo



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BEST PRACTICES FOR WEBSITE TOUCHPOINTS:

- Ensure clear call-to-actions (CTAs) on all pages
- Optimize page load speeds for better user experience
- Use heat mapping tools to understand user behavior
- Implement progressive profiling in forms to gather more information over time
- Personalize content based on visitor attributes and behavior
- Use UTM parameters on all the URLs you control that send traffic to your website. Be consistent with the chosen structure.
- Make sure to test the tracking of all your campaigns and links to ensure the contacts are tagged with the correct information within your CRM.

The "Direct" Problem

Usually with website touch points, there is an issue of many visits being attributed to 'Direct', but they are mostly not actually direct visits to your website. On average, only 5%-10% of your visits are truly direct. The reason such a big portion of your traffic is tagged as direct is incorrect data management. Read more about the direct abyss.

8

DEEP DIVE: PRODUCT TOUCH POINTS

Product touch points occur when users interact directly with your product or service. These are critical for demonstrating value and encouraging adoption.

KEY COMPONENTS OF *product touch points*

8.1 *Source Details*

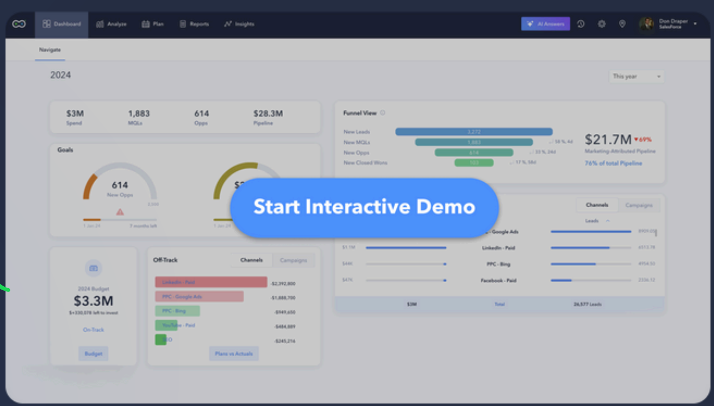
How users access your product:

- ***Direct Login***
  Users accessing the product directly
- ***Email Link***
  Accessing via links in onboarding or feature announcement emails
- ***In-app prompts***
  Moving to new features through in-product navigation

8.2
Engagement Details

How users interact with your product:

Feature Usage	Which features are used most frequently
Time in Product	How long users spend in the product
User Flow	The path users take through different features
Support Interactions	Frequency and nature of support requests



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8.3

Transition Details

Actions indicating increased adoption or value realization:

Achieving KEY MILESTONES
Completing important setup steps or using core features

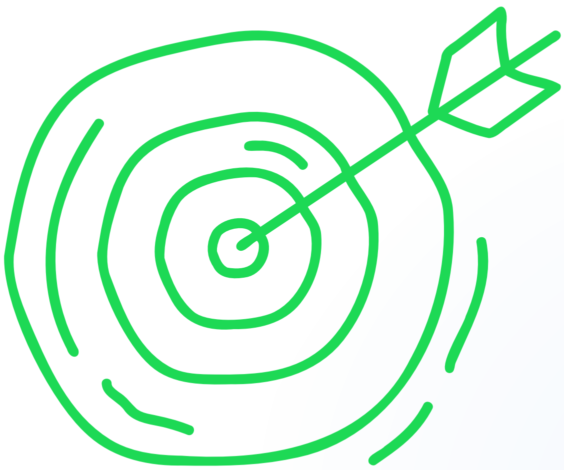
Increased USAGE
Upticks in login frequency or time spent in the product

Inviting TEAM MEMBERS
Adding new users (in B2B contexts)

UPGRADING
Moving to a higher tier or purchasing add-ons

BEST PRACTICES FOR PRODUCT TOUCHPOINTS:

- Implement a clear onboarding process for new users
- Use in-app messaging to guide users to key features
- Track and analyze usage patterns to identify areas for improvement
- Provide easily accessible support and resources
- Regularly gather and act on user feedback



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DEEP DIVE: EXTERNAL TOUCH POINTS

External touch points occur outside your owned properties and can significantly influence perception and decision-making.

KEY COMPONENTS OF *external touch points*

9.1 *Source Details*

Where these touch points occur:

Social Media
Mentions, shares, or discussions on platforms like LinkedIn or Twitter

Partner Websites
Mentions or features on partner or affiliate sites

Review Sites
Ratings and reviews on sites like G2 or Capterra

News Media
Coverage in industry publications or news outlets

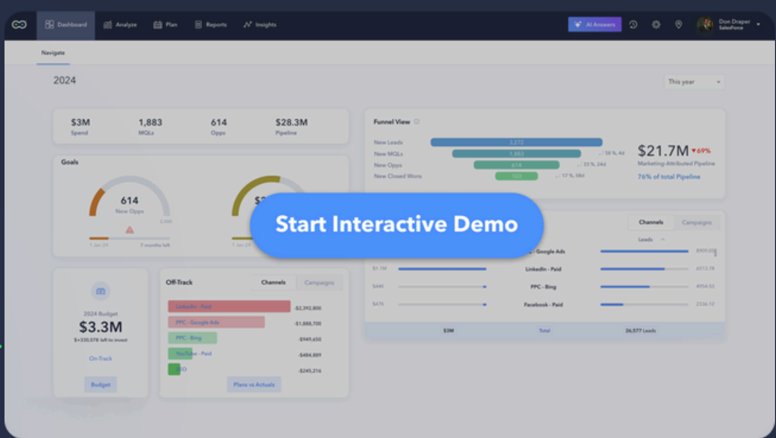
Industry Forums
Discussions in relevant online communities

Slack Channels
Dedicated slack professional channels

9.2
Engagement Details

How prospects interact with these external touch points:

Content Consumption	Reading reviews, articles, or social media posts
Participation	Commenting on or sharing content
Comparisons	Using comparison tools on review sites



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9.3

Transition Details

Actions that bring prospects closer to your owned channels:

CLICKING THROUGH	INCREASED BRAND SEARCHES	SOCIAL MEDIA FOLLOWS	EXTERNAL INTENT SIGNALS
Following links to your website or product	Searching for your brand after exposure	Following your brand's social accounts	Signals from 3rd party providers (such as G2 and Capterra) indicating intent at the company or contact level

BEST PRACTICES FOR EXTERNAL TOUCHPOINTS:

- Monitor brand mentions and sentiment across platforms
- Engage with users on third-party sites (respond to reviews, participate in discussions)
- Cultivate relationships with industry influencers and partners
- Encourage satisfied customers to leave reviews
- Create shareable content that extends your reach on external platforms

10

DEEP DIVE: OFFLINE TOUCH POINTS

Offline touch points are physical, real-world interactions with your brand. Despite the digital focus of many GTM strategies, offline touch points remain crucial, especially in B2B contexts. People always like face-to-face interaction and appreciate seeing that there are good people behind the brand.

KEY COMPONENTS OF *offline touch points*

10.1 Source Details

Trade Shows & Conference
Industry events where your brand is represented

Direct Mail
Physical marketing materials sent to prospects

Sponsored Events
Workshops, seminars, or networking events hosted by your brand

Billboard or Print Advertising
Traditional advertising methods

Word of Mouth
Referrals or mentions from colleagues or industry peers

10.2 Engagement Details

Booth Visits
Time spent at your booth during a trade show

Event Attendance
Participation in sponsored events or workshops

Material Collection
Brochures, samples, or promotional items taken

Conversations
Discussions with your team members or representatives

10.3 Transition Details

BUSINESS CARD EXCHANGES
Collecting contact information for follow-up

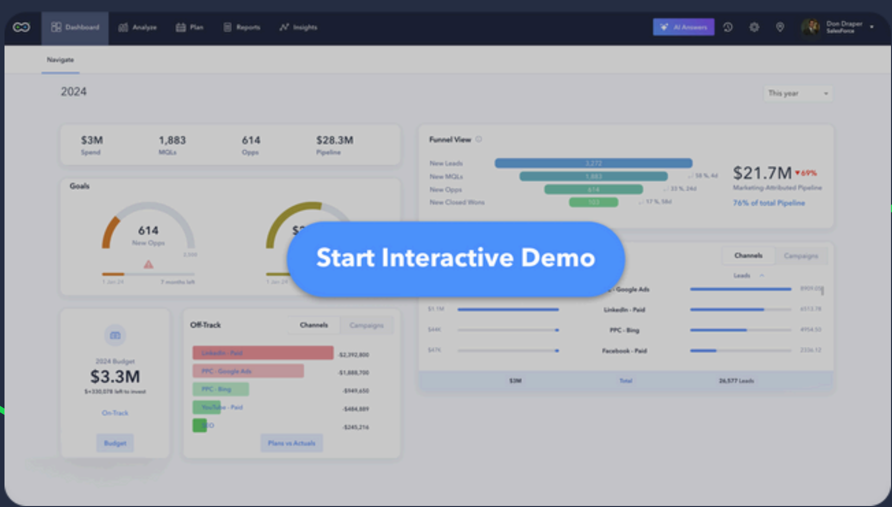
QR CODE SCANS
Linking physical materials to digital resources

EVENT REGISTRATION
Signing up for future events or demonstrations

DEMO REQUESTS
Scheduling product demonstrations following an offline interaction

BEST PRACTICES FOR OFFLINE TOUCHPOINTS:

- Integrate offline and online strategies for a seamless experience
- Use unique tracking codes or phone numbers for each offline campaign
- Follow up promptly on leads gathered from offline interactions
- Provide valuable, tangible materials that prospects will keep and reference
- Train staff to effectively engage with prospects at events and gather relevant information
- Be creative when sponsoring a conference; consider adding speaking engagements to increase traction to your booth
- When uploading lead lists from external sources, be sure to add all relevant touch point details data during the upload



11

DEEP DIVE: SALES TOUCH POINTS

Sales touch points involve direct interactions between your sales (or sales enablement) teams and potential customers. These are often high-value interactions that can significantly influence the buying decision.

KEY COMPONENTS OF *sales touch points*

11.1 Source Details

Inbound Leads
Prospects who have shown interest through your website or other channels

Referrals
Introductions from existing customers or partners

Outbound Prospecting
Cold calls or emails initiated by your sales team

Event Follow-Ups
Connections made after trade shows or sponsored events

Re-engagement
Reaching out to dormant leads or past customers

11.2 Engagement Details

Number of Call Attempts
Frequency and persistence of outreach efforts before successful contact

Call Duration
Length of phone conversations

Email Exchanges
Frequency and depth of email communications

Meeting Attendance
Who from the prospect's side attends meetings (decision-makers, influencers, etc.)

Demo Participation
Engagement level during product demonstrations

Question Types
The nature of inquiries made by the prospect

11.3 Transition Details

NEXT STEPS AGREED
Scheduling follow-up meetings or demos

INFORMATION SHARING
Prospect providing budget details or technical requirements

STAKEHOLDER INTRODUCTIONS
Being connected to other decision-makers

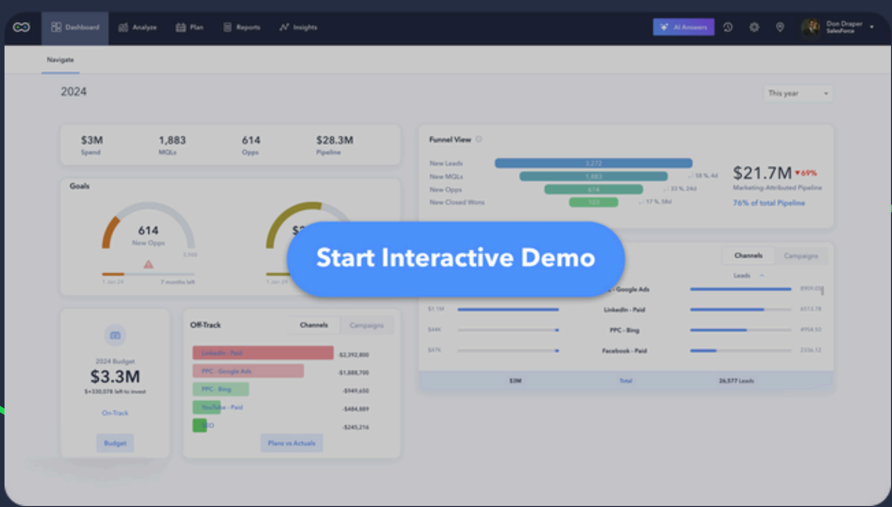
PROPOSAL REQUESTS
Asking for formal proposals or quotes

CONTRACT NEGOTIATIONS
Entering into discussions about terms and pricing

BEST PRACTICES FOR SALES TOUCHPOINTS:

- Align sales interactions with marketing messaging for consistency
- Use a system to track all interactions and ensure timely follow-ups
- Provide sales teams with detailed lead information from marketing touch points
- Implement a lead scoring system to prioritize high-potential prospects
- Regularly train sales teams on product updates and industry trends
- Use call recording and analysis tools to improve sales conversations
- Develop a clear sales process with defined stages and actions

By understanding and optimizing these various touch points, you can create a more effective and cohesive GTM funnel. Each type of touch point offers unique opportunities to engage prospects and move them closer to a purchase decision.



12

DEEP DIVE: DARK FUNNEL TOUCH POINTS

The concept of the "Dark Funnel" refers to the invisible influences on a buyer's journey that traditional analytics and tracking methods often miss. Understanding and leveraging these touch points can provide a significant competitive advantage in your GTM strategy.

12.1

WHAT ARE *dark funnel touch points?*

Dark Funnel touch points are **interactions that occur outside of your owned and measurable channels**. They include:

1. Word-of-mouth recommendations
2. Private discussions in Slack channels or other closed forums
3. Content consumption on third-party platforms without direct referral links
4. Offline conversations at industry events or among colleagues
5. Anonymous research conducted by potential buyers
6. Interactions with your brand on platforms that don't provide detailed analytics
7. Private chats on phone messaging apps

12.2

Importance of Dark Funnel Touch Points

1
Significant Influence:

These touch points often have a substantial impact on buying decisions, especially in B2B contexts.

2
Early-Stage Impact

Many dark funnel interactions occur early in the buyer's journey, shaping initial perceptions and considerations.

3
Authenticity

Dark funnel content is often perceived as more authentic and trustworthy than branded content.

4
Competitive Intelligence

Understanding dark funnel activities can provide insights into competitor strategies and market trends.

12.3

Challenges in Tracking Dark Funnel Touch Points

1 Lack of Visibility

By nature, these touch points are difficult to track and measure directly.

2 Attribution Difficulties

It's challenging to attribute influence to specific dark funnel interactions.

3 Data Integration

Integrating dark funnel insights with traditional funnel data can be complex and nearly impossible.

12.4

Strategies for Illuminating the Dark Funnel

Social Listening

Monitor social media and online forums for mentions of your brand or relevant topics.

Surveys and Interviews

Conduct research to understand hidden influences on your customers' buying decisions.

Community Engagement

Participate in industry forums and communities to gain insights and visibility.

Influencer Partnerships

Collaborate with industry influencers to extend your reach into dark funnel areas.

12.5

Leveraging Technology: THE INFINIGROW ADVANTAGE

Platforms like InfiniGrow can help illuminate many dark funnel touch points:

1 PROXIMITY ANALYSIS

InfiniGrow can identify and map touch points based on the proximity of interactions, even when direct attribution is challenging.

2 INTEGRATION CAPABILITIES

With integrations like LinkedIn impressions, InfiniGrow can capture data from platforms that are often part of the dark funnel.

3 MULTI-TOUCH ATTRIBUTION

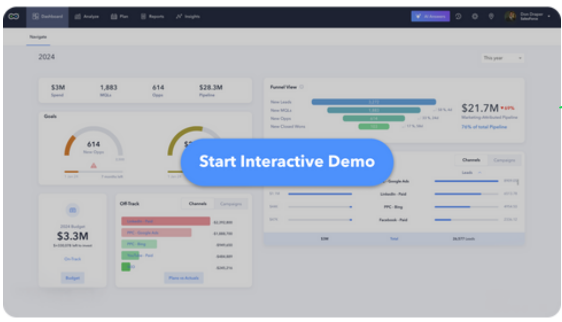
By considering a wide range of touch points, InfiniGrow can provide a more comprehensive view of the customer journey, including potential dark funnel influences.

4 AI-POWERED INSIGHTS

Advanced algorithms can identify patterns and correlations that might indicate dark funnel activities.

5 UNIFIED DATA VIEW

InfiniGrow combines data from various sources, helping to bridge the gap between dark funnel insights and traditional funnel metrics.



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12.6

BEST PRACTICES FOR MANAGING DARK FUNNEL TOUCHPOINTS:

- ***Adopt a Holistic View:*** Consider both measurable and unmeasurable touch points in your GTM strategy.
- ***Create Shareable Content:*** Develop content that's likely to be shared in dark funnel channels.
- ***Encourage Advocacy*** Build programs that motivate customers to become advocates in their professional networks.
- ***Monitor Industry Trends:*** Stay attuned to broader industry conversations that might influence dark funnel perceptions.
- ***Leverage Technology:*** Utilize platforms like InfiniGrow to gain deeper insights into potential dark funnel activities.

12.7

Key Takeaways

1. Dark Funnel touch points play a crucial role in B2B buying decisions but are often overlooked in traditional funnel analysis.
2. While challenging to measure, strategies and technologies exist to gain insights into dark funnel activities.
3. Platforms like InfiniGrow can help bridge the gap between dark funnel and traditional funnel analytics.
4. A comprehensive GTM strategy should account for both visible and invisible influences on the buyer's journey.

By acknowledging and strategically addressing dark funnel touch points, companies can gain a more complete understanding of their customer's journey and create more effective GTM strategies.

13

KNOWN VS ANONYMOUS TOUCHPOINTS

Understanding the difference between known and anonymous touch points is helpful in order to identify pre-funnel and post-funnel interactions, although you will see many anonymous touch points within the funnel itself.

13.1 Known Touchpoints

Known touch points occur when you can identify the individual interacting with your brand. These interactions are typically associated with a specific person in your database.

CHARACTERISTICS OF Known Touchpoints

- Associated with a specific contact record in your CRM or marketing automation system
- Allow for personalized engagement based on previous interactions and known preferences
- Provide rich data for lead scoring and nurturing
- Enable more accurate attribution of marketing efforts

EXAMPLES:

- A registered user logging into your product
- An identified contact submitting a form on your website
- A prospect opening and clicking through a personalized email
- Using advanced web identification technology such as RB2B

13.2
Unknown Touchpoints

Anonymous touch points occur when an individual interacts with your brand, but you cannot identify them specifically.

CHARACTERISTICS OF Unknown Touchpoints

- Not associated with a known individual in your database
- Can still offer valuable insights into overall engagement and interest
- Provide limited data for personalization and targeting
- May be partially identified at the company level through technologies like reverse IP lookup

EXAMPLES:

- A first-time visitor browsing your website
- An unknown person viewing your social media content
- Attendees at a trade show who don't provide contact information

13.3
Bridging Anonymous to Known

A key goal in GTM strategy is to convert anonymous touch points into known ones. This process typically involves:

- Offering valuable content in exchange for contact information
- Using cookies and tracking technologies to connect anonymous behavior with known contacts once they identify themselves
- Implementing progressive profiling to gather data over time
- Using 3rd party enrichment platforms to enrich the anonymous user with firmographic data

14

ACCOUNT LEVEL VS CONTACT LEVEL JOURNEYS

Most B2B GTM journeys are long and complex, and include multiple personas within the buying committee. Therefore, it's important to understand both individual contact journeys and the overall account journey.

14.1

Contact-Level Journeys

Contact-level journeys focus on the interactions and experiences of individual stakeholders within a target account.

KEY ASPECTS

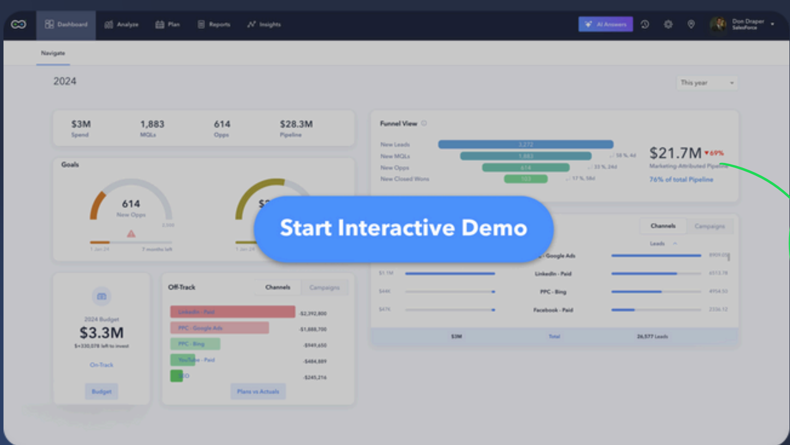
- Tracks personal interactions and preferences
- Allows for personalized messaging and content
- Helps identify individual influencers and decision-makers
- Provides detailed insights into specific roles and needs within an organization

14.2
Account-Level Journeys

Account-level journeys aggregate all contact-level journeys within a single organization to provide a holistic view of the account's progression through your funnel.

KEY ASPECTS

- Combines data from multiple stakeholders within an organization
- Helps identify overall account engagement and interest levels
- Supports account-based marketing (ABM) strategies
- Provides a more accurate picture of complex B2B buying processes involving multiple decision-makers



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14.3

Integrating Contact and Account-Level Data

Effective GTM strategies leverage both contact and account-level data:

- Use account-level data to prioritize and target high-potential organizations
- Leverage contact-level data to personalize interactions with individual stakeholders
- Identify patterns in how different roles within an organization engage with your brand
- Tailor content and messaging to address the needs of both individual contacts and the overall account

CRM Data Issues

A lot of the account-level data can get lost in your CRM due to manual processes and workflows. Some examples include team members not connecting contacts to deals and accounts correctly, not converting leads to contacts correctly within Salesforce, and manually adding duplicate contacts. It is recommended that you ensure the CRM admin work is done correctly and any issues are fixed. Alternatively, consider using a revenue marketing platform like InfiniGrow that will take care of the data ops and automatically fix these issues, preventing data loss. Learn more about why you shouldn't trust your CRM data for B2B marketing.

15 ATTRIBUTED AND NON-ATTRIBUTED TOUCHPOINTS

Understanding which touch points contribute to conversions is extremely helpful for optimizing your GTM strategy. This is where attribution comes into play.

15.1 Attributed Touchpoints

Attributed touch points are those that can be directly linked to a desired outcome, such as a lead conversion or a sale.

KEY ASPECTS Attributed Touchpoints

- Provide clear ROI for specific marketing efforts
- Guide budget allocation for marketing activities
- Help in understanding which channels and content are most effective
- Support data-driven decision making in your GTM strategy

COMMON ATTRIBUTION MODELS

FIRST-TOUCH
Gives full credit to the first touch point in a customer journey

LAST-TOUCH
Attributes the conversion to the final touch point before purchase

MULTI-TOUCH
Distributes credit across multiple touch points (e.g., linear, time-decay, or U-shaped models)

15.2

Non-Attributed Touch Points

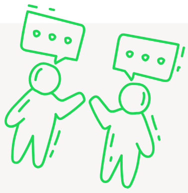
Non-attributed touch points are interactions that contribute to the customer journey but can't be directly linked to a conversion.

IMPORTANCE OF *Non-Attributed Touchpoints*

- Build brand awareness and perception
- May influence decisions indirectly
- Contribute to the overall customer experience
- Help in understanding the full complexity of customer journeys

EXAMPLES OF NON-ATTRIBUTED TOUCHPOINTS

Viewing a billboard advertisement



Hearing about your product from a colleague

Reading an article that mentions your brand but doesn't link to your site

15.3

Balancing Attribution and Non-Attribution

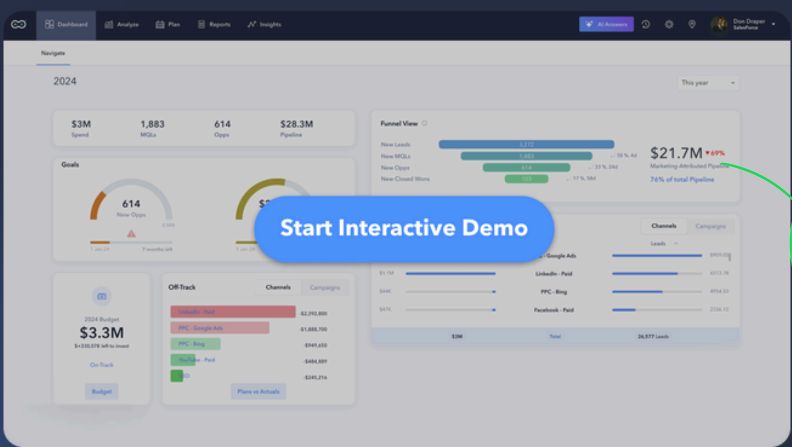
To create a comprehensive GTM strategy:

1. Implement robust attribution modeling for measurable touch points

2. Use surveys and customer interviews to understand the impact of non-attributed touch points

3. Consider the holistic customer journey beyond just attributed conversions

4. Regularly review and adjust your attribution model to reflect changing customer behaviors



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16

TRANSITION POINTS AND VELOCITY

Transition points and velocity are **indicators that reveal the efficiency and health of your GTM funnel**. These metrics go beyond simple conversion rates, offering deeper insights into how prospects move through your sales process. Together, they paint a dynamic picture of your funnel's performance, exposing bottlenecks, identifying high-performing segments, and providing actionable data to optimize your GTM strategy. By closely monitoring these indicators, businesses can not only gauge the current effectiveness of their funnel but also predict future performance and make data-driven decisions to accelerate growth.

16.1 Transition Points

Transition points are specific moments in the customer journey where a prospect moves from one stage to another in your funnel.

KEY ASPECTS OF *Transition Points*

- Represent critical decision moments for prospects
- Provide clear indicators of progression through the funnel
- Often involve a specific action (e.g., requesting a demo, starting a trial)
- Help in identifying where prospects may be getting stuck

EXAMPLES OF *Transition Points*

- Moving from anonymous visitor to known lead by filling out a form
- Requesting a sales call after viewing product information
- Upgrading from a free trial to a paid subscription
- Upgrading from a free trial to a paid subscription

16.2

Velocity

Velocity refers to the speed at which prospects move through your funnel, from initial awareness to purchase decision.

IMPORTANCE OF *Velocity*

- Helps in forecasting sales and revenue
- Identifies bottlenecks in your sales process
- Allows for more accurate resource allocation
- Provides insights into the efficiency of your GTM strategy

FACTORS AFFECTING *Velocity*

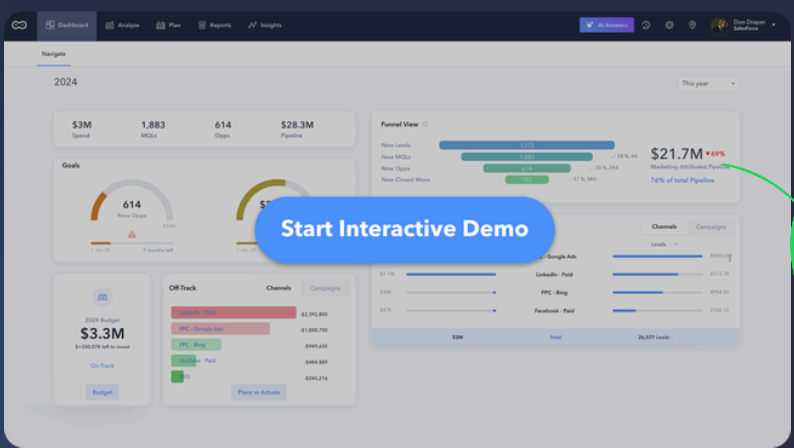
- Quality of lead nurturing content
- Complexity of the product or service
- Effectiveness of sales follow-ups
- Length of the typical buying cycle in your industry

16.3

Analyzing and Optimizing Transition Points and Velocity

To improve your GTM funnel:

1. Identify key transition points in your customer journey
2. Measure the time spent between each transition point
3. Analyze factors that contribute to faster or slower velocity
4. Implement strategies to reduce friction at transition points
5. Use automation to nudge prospects towards the next stage when appropriate
6. Regularly review and optimize your content and processes to improve velocity
7. Make sure you track all touch points between the transition points correctly, as well as tag the dates for each touch point to accurately measure velocity.



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17

DEFINING FUNNEL STRATEGIES AND KEY METRICS

Understanding and properly defining the stages of your GTM funnel is important for effective measurement and optimization. This section explores common funnel stages, their definitions, associated metrics, and industry benchmarks.

17.1 Common Funnel Stages

While funnel stages can vary based on a company's specific go-to-market strategy, here are common stages and potential definitions:

1 LEAD

DEFINITION:
An individual who has shown initial interest in your company or product.

POSSIBLE CRITERIA:

- Expressed direct interest in the product
- Meets budget and authority requirements
- Has a clear use case or pain point

2 MARKETING QUALIFIED LEAD (MQL)

DEFINITION:
A lead that marketing has identified as more likely to become a customer based on lead intelligence.

POSSIBLE CRITERIA:

- Meets ideal customer profile (ICP)
- Engaged with multiple pieces of content
- Visited high-intent pages (e.g., pricing page)

3
SALES QUALIFIED LEAD (SQL)

DEFINITION:
An MQL that the sales team has qualified as a potential opportunity.

POSSIBLE CRITERIA:
- Expressed direct interest in the product
- Meets budget and authority requirements
- Has a clear use case or pain point

4
OPPORTUNITY

DEFINITION:
A qualified prospect that is in active sales discussions.

POSSIBLE CRITERIA:
- Engaged in a sales demo or presentation
- Deal reached a specific stage such as received a proposal
- In the process of internal evaluation

5
CUSTOMER

DEFINITION:
A closed won deal resulting in a paying customer

CRITERIA:
- Signed contract and begun using the product/service

Pipeline and Revenue

Once a prospect enters the opportunity stage you can add a pipeline KPI meaning the value of the opportunity in progress. In addition you can have a forecasted revenue metric taking a relevant ratio of the value of the opportunity based on the progress of the deal stage. Once a prospect becomes a customer the associated opportunity value becomes revenue KPI. When you start measuring pipeline and revenue you can connect it to your cost data to measure your ROI (Return on investment), ROAS (Return on Ad Spend) and cost for each funnel stage (cost per lear, cost per MQL, cost per SQL, cost per Opportunity and cost per customer).

17.2 Customizing Funnel Stages

Companies should adapt these stages based on their specific GTM strategy:

Product-Led Growth	Enterprise Sales	Channel Sales
Might include stages like "Free Trial User" or "Product Qualified Lead (PQL)"	Could have additional stages like "Technical Evaluation" or "Contract Negotiation"	Might include partner-specific stages like "Partner Qualified Lead"

17.3 Velocity Metrics

We discussed velocity in theory in section 15.2, In the context of the specific funnel stages you can measure the speed at which leads move through your funnel stages. Key velocity metrics include:

Time to MQL	Time to SQL	Sales Cycle Length
Average time from lead creation to MQL status	Average time from MQL to SQL status	Average time from SQL to closed deal

Understanding these metrics helps identify bottlenecks and opportunities for acceleration in your funnel.

17.4 Conversion Rates

Conversion rates measure the percentage of leads that successfully move from one stage to the next. Key conversion rates include:

1. Lead to MQL Conversion Rate
2. MQL to SQL Conversion Rate
3. SQL to Opportunity Conversion Rate
4. Opportunity to Customer Conversion Rate
5. Overall Funnel Conversion Rate (Lead to Customer)

17.5 Industry Benchmarks

While benchmarks can vary widely based on industry, product complexity, and sales model, here are some **general B2B SaaS benchmarks** to consider:

LEAD TO MQL:	MQL TO SQL:	SQL TO OPPORTUNITY:	OPPORTUNITY TO CUSTOMER:	OVERALL FUNNEL (LEAD TO CUSTOMER):
10-15%	15-20%	20-30%	20-30%	1-2%

Velocity Benchmarks

TIME TO MQL:	TIME TO SQL:	SALES CYCLE LENGTH
1-2 weeks	1-3 weeks	3-6 months (can be longer for enterprise deals)

These benchmarks are general guidelines. Your specific benchmarks may vary based on your industry, target market, and GTM strategy

Note: There are three different ways to measure conversion rates:

1. *Running Conversion Rate*

   This metric reflects the ongoing rate of conversion within a specified time window. It provides a real-time picture of how effectively your funnel is converting leads at any given moment.

2. *Cohort Conversion Rate*

   The rate is based on a group of leads generated within a specific time period. For example, to understand the impact of last month's marketing activities, you'd track how those leads converted to SQLs. When measuring cohort rates, consider the velocity between stages due to time delays that can improve the conversion rate over time.

3. *Snapshot (simple) Conversion Rate*

   This rate provides a backward-looking analysis of a specific timeframe. For example, to determine the Q2 conversion rate from MQL to SQL, you'd divide the total SQLs by the total MQLs within that quarter.

17.6 Drop Off Points

Every GTM funnel has drop-off points – points where your prospect leaves the journey by opting out of communication or not responding to your initiated touchpoints.

If they request to opt out of communication, you should respect that. When they are ready, they will opt in again.

If they are not responding, you should nurture them only if they are within your ICP (Ideal Customer Profile criteria). Make sure you have a variety of touchpoints via different channels, and ensure your touchpoint attempts provide value rather than aggressively trying to push to the next stage. If/when the person is ready, they will carry on moving down the funnel.

17.7

Optimizing Funnel Performance

To improve your funnel performance:

1. Regularly review and refine stage definitions to ensure alignment with your GTM strategy.
2. Use lead scoring models to improve the quality of leads entering each stage.
3. Analyze conversion rates and velocity metrics to identify bottlenecks and optimization opportunities.
4. Implement targeted content and nurturing strategies for each funnel stage.
5. Ensure sales and marketing alignment on definitions and handoff processes.
6. Continuously test and optimize your approach based on data-driven insights.

17.8

Key Takeaways

- Clearly defined funnel stages are crucial for effective measurement and optimization.
- Customize your funnel stages to align with your specific GTM strategy.
- Monitor both conversion rates and velocity metrics to get a complete picture of funnel performance.
- Use industry benchmarks as a starting point, but develop your own benchmarks based on historical performance.
- Regularly review and optimize your funnel definitions and processes to improve overall GTM effectiveness.

By properly defining and measuring your funnel stages, you can gain valuable insights into your GTM performance and identify opportunities for improvement across the entire customer journey.

18

CRM DATA COMPATIBILITY AND CHALLENGES IN GTM FUNNEL ANALYSIS

While Customer Relationship Management (CRM) systems like Salesforce and HubSpot are essential tools for managing customer interactions, **they often fall short when it comes to comprehensive B2B funnel analysis**. This section explores the limitations of traditional CRMs and the importance of data preparation for accurate GTM funnel insights.

18.1 Limitations of Traditional CRMs for B2B Funnel Analysis

Despite their widespread use, CRMs like Salesforce and HubSpot have inherent limitations when it comes to B2B funnel analysis:

1. Simplified Data Structures

CRMs often use simplified data models that don't fully capture the complexity of B2B buying processes.

2. Limited Touch Point Tracking

Many CRMs struggle to track and associate all relevant touch points, especially those occurring outside the CRM ecosystem.

3. Inflexible Attribution Models

Built-in attribution models may not accurately reflect the nuanced reality of B2B customer journeys.

4. Lack of Cross-Object Analysis

CRMs often struggle with analyses that require data from multiple objects (e.g., contacts, accounts, opportunities).

5. Time-Based Analysis Challenges

Historical data tracking and time-based funnel analysis can be difficult in standard CRM setups.

6. Manual Process

Incorrect manual processes within the GTM team result in data loss. For example, not connecting contacts to opportunities, not converting leads to contacts, opening duplicate contacts, and more.

7. Legacy Automations

Your CRM might have legacy automations running in the background that manipulate your data. They used to be useful in the past but were not paused when processes and definitions were updated.

18.2 Risks of Relying on RAW CRM DATA

Building models and drawing insights directly from raw CRM data can lead to several issues:

1 INCOMPLETE JOURNEY VIEWS

Missing touch points can result in an incomplete understanding of the customer journey.

2 INACCURATE ATTRIBUTION

Flawed data structures can lead to incorrect attribution of conversions and revenue.

3 MISLEADING FUNNEL METRICS

Conversion rates and velocity calculations may be skewed due to data gaps or structural issues.

4 MISALIGNED SALES AND MARKETING EFFORTS

Incorrect insights can lead to misaligned strategies between sales and marketing teams.

5 POOR RESOURCE ALLOCATION

Inaccurate analysis can result in misallocation of marketing and sales resources.

18.3 Preparing Data for Accurate Funnel Analysis

Before attempting to analyze your GTM funnel, it's crucial to ensure you have a trustworthy and comprehensive dataset. Key steps include:

1. Data Audit
Conduct a thorough audit of your CRM data to identify gaps, inconsistencies, and structural issues.

2. Touch Point Integration
Ensure all relevant touch points are captured and properly associated with contacts and accounts.

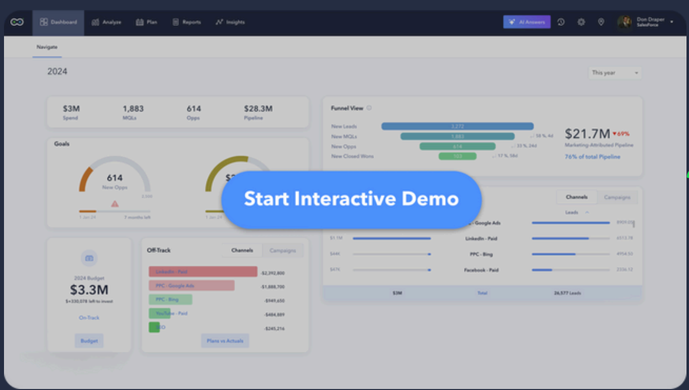
3. Data Cleansing
Address data quality issues such as duplicates, missing fields, and incorrect associations.

4. Custom Object Creation
Develop custom objects or external data warehouses to capture complex B2B relationships and interactions.

5. Data Unification
Integrate data from multiple sources (CRM, marketing automation, website analytics, etc.) to create a unified view of the customer journey.

6. Historical Data Reconstruction
Implement processes to reconstruct historical data for accurate trend analysis.

7. Automated Data Validation
Set up ongoing data validation processes to maintain data integrity over time.



Note:

Want to see how InfiniGrow automatically fixes all your CRM data inaccuracies and preps it for attribution analysis? Schedule a demo.

18.4 Advanced Solutions for B2B FUNNEL ANALYSIS

To overcome the limitations of traditional CRMs:

1 PURPOSE-BUILT ANALYTICS PLATFORMS

Invest in platforms specifically designed for B2B funnel and journey analysis. (You are invited to check out InfiniGrow)

2 CUSTOM DATA WAREHOUSES

Develop custom data warehouses that can handle the complexity of B2B relationships and interactions. Learn more about building your own attribution infrastructure.

3 AI AND MACHINE LEARNING

Utilize advanced analytics techniques to uncover patterns and insights that might be missed in traditional analysis.

4 CONTINUOUS DATA ENRICHMENT

Implement processes for ongoing data enrichment to fill gaps and improve the accuracy of your dataset.

18.5 Key Takeaways

- Traditional CRMs are not inherently designed for complex B2B funnel analysis.
- Relying on raw CRM data for GTM funnel insights can lead to flawed strategies and resource allocation.
- Thorough data preparation and validation are crucial before attempting funnel analysis.
- Consider investing in specialized tools or custom solutions for accurate B2B funnel and journey analysis.
- Maintain a continuous focus on data quality and enrichment to ensure ongoing accuracy of your GTM insights.

By addressing these data challenges, companies can build a solid foundation for accurate, insightful GTM funnel analysis, leading to more effective strategies and better business outcomes.

19

THE POWER OF MULTI-TOUCH ATTRIBUTION IN GTM FUNNEL ANALYSIS

As B2B customer journeys become increasingly complex, relying on single-touch attribution models can lead to misguided insights and suboptimal marketing decisions. This section explores the limitations of single-touch models and the advantages of multi-touch attribution, highlighting the benefits of using specialized platforms like InfiniGrow.

19.1 The Pitfalls of Single-Touch Attribution

Single-touch attribution models, such as first-touch or last-touch, attribute the entire value of a conversion to a single interaction point. While simple to implement, these models have significant drawbacks:

1

OVERSIMPLIFICATION

They fail to capture the complexity of B2B buying journeys, which often involve multiple touchpoints across various channels.

2

MISALLOCATION OF CREDIT

They may overvalue certain channels while undervaluing others that play crucial roles in the decision-making process.

3

INCOMPLETE CUSTOMER JOURNEY VIEW

They ignore the cumulative effect of multiple interactions over time.

4

BIASED DECISION-MAKING

Relying on these models can lead to skewed budget allocations and strategy decisions.

5

NEGLECT OF NURTURING EFFORTS

They often undervalue middle-of-funnel activities that are critical in B2B sales cycles.

19.2 The Benefits of Multi-Touch Attribution

Multi-touch attribution models provide a more nuanced and accurate view of the customer journey:

1. ***Holistic Journey Analysis***
   They consider all touchpoints that contribute to a conversion.
2. ***Fair Credit Distribution***
   They allocate credit across multiple interactions, providing a more balanced view of channel effectiveness.
3. ***Improved ROI Understanding***
   They offer better insights into the true ROI of different marketing activities.
4. ***Enhanced Budget Allocation***
   They enable more informed decisions about where to invest marketing resources.
5. ***Better Alignment with B2B Realities***
   They reflect the typically longer and more complex B2B buying processes.

19.3 Challenges in Implementing Multi-Touch Attribution

While beneficial, implementing multi-touch attribution can be challenging:

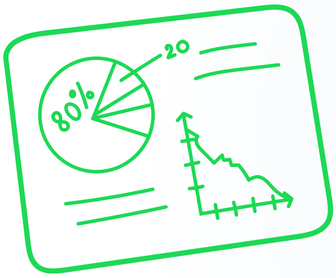
1 DATA INTEGRATION
It requires integrating data from multiple sources and channels.

2 MODEL COMPLEXITY
Choosing and implementing the right attribution model can be complex.

3 TECHNICAL REQUIREMENTS
It often necessitates advanced analytics capabilities.

4 ORGANIZATIONAL BUY-IN
It may require a shift in how marketing performance is evaluated and reported.

19.4 The InfiniGrow Solution: STREAMLINING MULTI-TOUCH ATTRIBUTION



Dedicated platforms like InfiniGrow offer solutions to these challenges, providing numerous benefits:

1. CRM Data Correction
InfiniGrow fixes and enhances your CRM data, ensuring a solid foundation for attribution analysis.

2. User-Friendly Interface
It offers an intuitive platform for marketers to perform complex attribution analyses without deep technical expertise.

3. Advanced Attribution Models
InfiniGrow provides sophisticated multi-touch attribution models tailored for B2B scenarios.

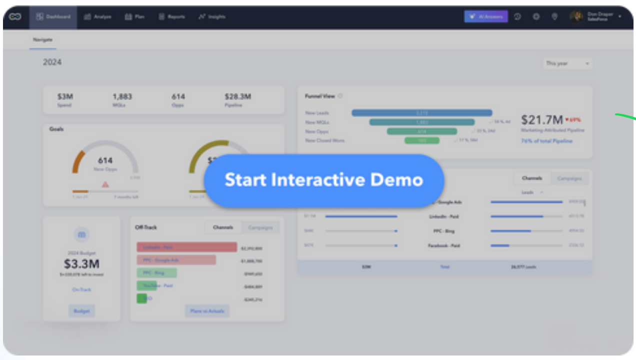
4. Comprehensive Touch Point Integration
It captures and integrates data from a wide range of marketing channels and touchpoints.

5. Real-Time Insights
The platform offers up-to-date attribution insights, enabling agile marketing decision-making.

6. Customizable Reporting
It allows for flexible reporting to meet various stakeholder needs.

7. Forecasting
InfiniGrow can provide forward-looking insights to guide future marketing strategies.

8. ROI Optimization
By providing accurate attribution data, it helps optimize marketing spend and improve overall ROI.



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19.5
Key Takeaways

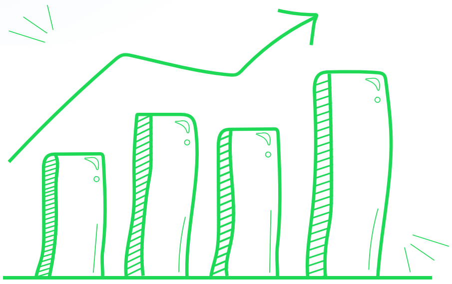
Single-touch attribution models
are inadequate for complex B2B customer journeys.

Multi-touch attribution
provides a more accurate and nuanced view of marketing effectiveness.

Implementing multi-touch attribution
can be challenging but is crucial for optimizing B2B marketing strategies.

Dedicated platforms like InfiniGrow
offer comprehensive solutions to attribution challenges, combining data correction, advanced modeling, and user-friendly interfaces.

Investing in robust attribution solutions
can lead to more efficient resource allocation, improved ROI, and better-aligned marketing strategies.



By leveraging multi-touch attribution through platforms like InfiniGrow, B2B marketers can gain a deeper understanding of their GTM funnels, make data-driven decisions, and ultimately drive better business outcomes.

20

CONCLUSION: OPTIMIZING YOUR GTM STRATEGY

As we've explored throughout this guide, mastering the **GTM funnel is crucial for success in today's complex B2B landscape**. Let's recap the key insights and provide some final thoughts on optimizing your GTM strategy.

20.1 Key Takeaways

1. *Holistic Approach*
Effective GTM funnels encompass all touchpoints across marketing, sales, and customer success, providing a comprehensive view of the customer journey.

2. *Touch Point Diversity*
Understanding and optimizing various types of touch points - from website interactions to offline events - is essential for a well-rounded GTM strategy.

3. *Known vs. Anonymous*
Balancing the management of both known and anonymous touch points is crucial for capturing the full spectrum of customer interactions

4. *Account-Level Perspective*
In B2B contexts, considering both individual contact journeys and overall account journeys is vital for addressing the complexities of buying committees.

5. *Attribution Challenges*
Moving beyond single-touch attribution to multi-touch models provides a more accurate understanding of channel effectiveness and ROI.

6. *Data Quality Imperative*
Ensuring the quality and completeness of your CRM data is fundamental to accurate funnel analysis and insights.

7. *Journey vs. Funnel*
Integrating both customer journey and funnel concepts leads to a more customer-centric and effective GTM approach.

8. *Continuous Optimization*
Regular analysis and refinement of your GTM funnel based on data-driven insights is key to long-term success.

20.2
The Path Forward

As you work to optimize your GTM strategy:

1
INVEST IN DATA INFRASTRUCTURE

Consider platforms like InfiniGrow that can address CRM data limitations and provide robust multi-touch attribution capabilities.

2
FOSTER CROSS-FUNCTIONAL COLLABORATION

Encourage alignment and data sharing between marketing, sales, and customer success teams to create a seamless customer experience.

3
EMBRACE FLEXIBILITY

Design your GTM funnel to accommodate the non-linear nature of B2B buying processes and diverse customer needs.

4
PRIORITIZE CUSTOMER-CENTRICITY

Always keep the customer's perspective at the forefront of your GTM strategy, balancing your business goals with customer needs and preferences.

5
LEVERAGE TECHNOLOGY

Utilize AI and machine learning technologies to uncover deeper insights and predict future trends in your GTM funnel.

6
CONTINUOUS LEARNING

Stay informed about evolving best practices in GTM strategies and be willing to adapt your approach as the B2B landscape changes.

20.3
Final Thoughts

Mastering the GTM funnel is an ongoing journey that requires dedication, adaptability, and a commitment to data-driven decision-making. By understanding the intricacies of touch points, leveraging advanced attribution models, ensuring data quality, and maintaining a customer-centric approach, you can create a GTM strategy that not only drives conversions but also builds lasting relationships with your customers.

Remember, the most successful GTM strategies are those that evolve with changing customer needs and market dynamics. Stay curious, remain open to new approaches, and continually seek ways to enhance your understanding of your customers' journeys.

By applying the insights and best practices outlined in this guide, you'll be well-equipped to navigate the complexities of B2B marketing and sales, ultimately driving growth and success for your organization in an increasingly competitive landscape.