

Make Go-to-Market a Team Sport with the Data Model





According to Pavilion's 2023 Pulse Survey, 50% of go-to-market (GTM) leaders lowered their revenue goals as a result of missing their revenue targets significantly.

To ensure that revenue targets aren't missed again, they are shifting the focus to upsells, cross-sells, and expansion. As a result, alignment of pre-sale and post-sale motions has become critical.

Unfortunately, in many organizations, sales, marketing, and customer success still operate in a silo. Each team tracks different goals, uses different tech, and follows different data standards.

To create GTM synergy, teams must develop these four key components:

- 1 A central framework for GTM**
- 2 A central view of the customer and the impact they experience**
- 3 KPIs for your customer journey**
- 4 Coordinated execution across the entire team**

Enter: The Data Model.

What is the Data Model?

“That, to me, is the best thing about the data model: that it looks at the entire journey, helps the entire org align around the customer experience you want to create, and breaks down the silos.”

- **Mark Rosenthal**, CRO at Kastle Systems

The Data Model for recurring revenue companies, often represented by a bowtie, is a model that enables functional unison across the revenue team because it ensures everyone is marching to the same destination. While other methodologies and models cover parts of the customer journey, this Data Model covers the entire journey, from prospect to lifetime value.



The **Data Model** was originally conceived by Jacco van der Kooij of Winning by Design and is taught in Pavilion’s **Revenue Architecture course**. Customer-centric at its core, the recurring revenue Data Model maps specific stages of the customer journey.

To achieve a common language, each of the nine stages has clearly defined customer objectives and exit/entry criteria, creating milestones for each stage. These milestones ensure you can then build the right people, processes, and data signals to support the outcome that must be achieved.

Think of a school of fish. If everyone is swimming in the same direction, the channeled energy and momentum is unstoppable.

- **Kristina Wiig**, SaaS expert

There are then three primary metrics the model tracks:



Volume: How many customers are needed in each stage of the customer journey to hit your revenue target



Conversion rate: How frequently customers convert at each stage of the journey



Time: How long it takes for the customer to move from one stage to another

Together, these three metrics provide a formulaic yet flexible methodology for driving customer value at all stages of revenue generation.

Benefits of the Data Model

The Data Model allows revenue leaders to identify and diagnose problems within your revenue engine, enabling you to address them faster, with more targeted solutions as a single GTM team. This is why the Data Model helps revenue teams break down silos and improve cross-functional collaboration and alignment.

1 Revenue generation as a team sport:

As the central model that revenue teams work from, the Data Model ensures shared goals, definitions, and metrics are all created from a unified revenue goal.

2 Complete visibility of GTM:

The Data Model provides GTM teams with performance metrics in the context of revenue growth, not just the point of sale. Therefore, the CMO can align messaging and campaign performance to customer outcomes post-sale. Or a CRO can see which of their AEs are driving the greatest revenue growth compared to the AEs driving the most churn.

3 Proactive instead of reactive:

The Data Model metrics provide leading indicators of success throughout your GTM. Therefore, GTM teams can identify, diagnose, and respond before it's too late.

The Data Model is critical for all businesses that want a unified GTM. "Think of a school of fish," says SaaS expert Kristina Wiig. "If everyone is swimming in the same direction, the channeled energy and momentum is unstoppable."



Challenges in Implementing a Data Model

“What’s interesting about models is that it’s just a model. Then you have to get into the real world implementation of that.”

– **Kristina Wiig**, SaaS expert

The Data Model sounds great on paper and works beautifully when executed well. Still, the delta between those two points can remain wide open unless businesses address the challenges of implementing a Data Model.

Three challenges that arise are poor change management, conflicting definitions and KPIs, and data misalignment.

Poor Change Management

According to Rosenthal, “The two biggest challenges in trying to implement the bowtie now are managing change across the org (you need people to believe and adopt) and getting the actual data.”

Change management is absolutely critical to any transformation initiative. Even if your team decided to start using the Bowtie Data Model tomorrow, you would still need to sell the idea to other teams and get buy-in so that your data can be truly unified.

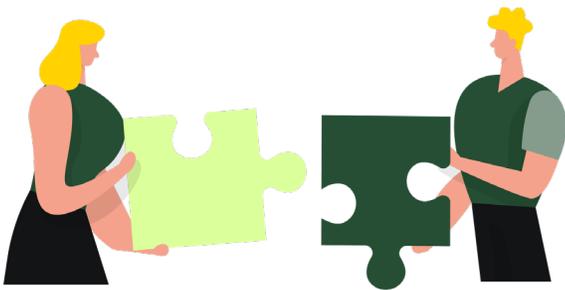
Wiig says the earlier you align people, processes, and technology, the better. “Change management becomes harder the more you grow. A suggestion might be to ensure that CEOs who are responsible for pulling together executive leadership know that they have to set goals for their functional leaders to get aligned.”

Aligning your team on goals, expectations, and data standards is critical in successfully implementing the Data Model for GTM.

If not everyone understands the goals from above then the data can be interpreted in different ways – that don’t align with the mission.

– **Nia Barnabie**, VP of Revenue Strategy and Operations

Conflicting Definitions and KPIs



“There’s a misalignment in the goals of each functional group, especially in an enterprise sales environment where marketing departments are still being goaled on things like MQLs. Those MQLs are essentially meaningless in most cases for sales. Sales is only interested in revenue,” says Hudson. “And CS is often looking at and thinking in a completely different way than marketing and sales.”

Wiig points out how this can end up being to the detriment of the customer. “How companies measure and tell stories around their data changes with each department in the customer journey ... All these departments are competing around who is gonna achieve their goals and the system gets gamed at the expense of the customer.”

The primary reason for this issue lies in the static nature of definitions and key performance indicators. Extensive planning occurs at the start of the year, during which agreements are reached across the team regarding definitions and KPIs. However, as the plan is implemented, the Go-to-Market functions often fail to adapt with the required speed and precision, causing your revenue train to fall off the tracks.

Data Misalignment

Data misalignment is a foregone conclusion when there are conflicting definitions. But even if your GTM teams are tightly aligned on definitions and KPIs, the systems that track this information can create inaccuracies in your Data Model.

As Nia Barnabie, VP of Revenue Strategy and Operations, says “The data lives in technology, so having different pieces of data living in different places is difficult. If not everyone understands the goals from above, then the data can be interpreted in different ways – that don’t align with the mission.”

Diedre Hudson, VP of Revenue Marketing at Bloomfire, agrees. “Having data in different systems can be problematic,” she says, because of how differently marketing might look at individual metrics like ARR and total revenue than finance, or how differently each tool formats dates and geographical locations.

Without alignment on data, your model will break down, and GTM motions are likely to be weak and ineffective.

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– **Nia Barnabie**, VP of Revenue Strategy and Operations

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How to Overcome These Challenges and Put Your Data Model Into Action

“Bowtie gets everyone aligned about what happens in the life of a lead.”

– **Diedre Hudson**, VP of Revenue Marketing at Bloomfire

According to Gregg Wheeler, CRO at Distillery, the bowtie Data Model “forces a company to determine what’s important to them.” The bowtie Data Model helps teams understand their individual roles within the wider context of the company’s GTM motions.

Once you’ve addressed the challenges of implementing your Data Model, consider these next steps for putting your model into action:

Create a Central Framework with Milestones

Milestones are the defined objectives and entry/exit criteria for each stage of the bowtie, making them an important part of every Data Model. To align on milestones, get as specific as possible about what it means, for example, to move from Buyer Readiness to Selection: what has to happen for that milestone to be met? Keeping the criteria vague will foster misalignment.

A challenge many of us have faced is sales claiming the MQLs are weak and marketing claiming that sales is throwing away strong leads. This happens when there are poor definitions and criteria or organizations adopt methodologies like BANT or MEDDIC without establishing the milestone’s objective.

For that reason, start by identifying what you want to achieve at that customer journey stage. Why is this stage important to the customer and to your org? What does success look like? Once those can be answered, the team can then define the right methodology or criteria to facilitate. The criteria should then define the specific areas of action and impact the customer achieves. The key here is that each GTM function plays a part in determining the objective and criteria that define the milestone.

Ensure your GTM team is in agreement with these definitions and criteria for each stage. This is critical because you need to understand how you’ll get there together [and] be able to pivot quickly.

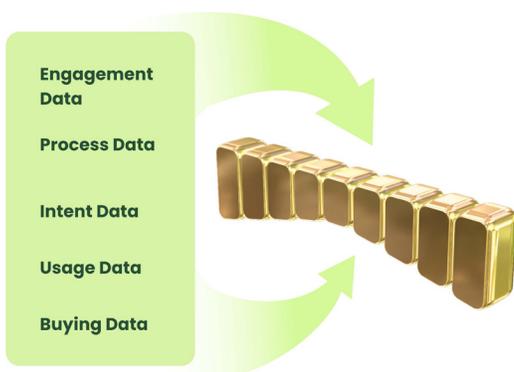
- **Nia Barnabie**, VP of Revenue Strategy and Operations

Rosenthal fosters this alignment on milestones through documentation, while Wiig starts with a growth mindset workshop talking about the concept of systems thinking, and Hudson focuses on the need for lots of communication, collaborative data assessment, and sharing insights across the revenue team.

Ensure your GTM team is in agreement with these definitions and criteria for each stage. This is critical, Barnabie says, “Because you need to understand how you’ll get there together [and] be able to pivot quickly.”

Finally, milestone definitions should iterate and evolve with your org, so we recommend they are, at minimum, reviewed quarterly to ensure they continue representing the best outcomes for you and your customers. Use your data to inform improvements to your criteria be sure to educate all members of GTM team so that everyone is bought into and knows the definitions.

Use Your Entire Tech Stack to Track KPIs



Now that you have clearly defined objectives and criteria, you can accurately track KPIs. But what data are you using that best represents the milestone criteria? If data is the fuel for your GTM engine, then your tech stack is the gas station. When efficiently utilized, your tech stack becomes a powerhouse for your Data Model, enabling more reliable results and repeatable success. This isn’t just about creating a field in your CRM and then enabling folks to follow a process to update that field – there’s a far better and richer data source that should be used to inform your Data Model.

Consider these five different types of data already living in your tech stack today:

	Criteria examples	Systems with this data
<p>Engagement Data</p> <p>Measures user interaction with people or content to gauge how well their offerings resonate with the audience.</p>	<ul style="list-style-type: none"> • Emails • Meetings • Calls • Likes, shares, comments • Click-through rates 	<p>Google Analytics, LinkedIn, SalesLoft, Outreach, Gong, metadata, Gainsight, Slack, Drift</p>
<p>Intent Data</p> <p>Reveals user intentions and preferences to predict actions and interests from online behavior.</p>	<ul style="list-style-type: none"> • Clicking on specific product categories • Searching for particular keywords • Time spent on a website 	<p>6sense, Infer, G2, Demandbase, Clearbit, Zoominfo, Google Analytics, Bombora, HubSpot, Marketo, MadKudu, UserGems, Apollo</p>
<p>Process Data</p> <p>Details workflow steps and actions for efficient business process analysis and optimization.</p>	<ul style="list-style-type: none"> • Lead Generation • Qualification • Product Demo • Proposals • Contracts 	<p>Rattle, Lucidchart, HubSpot, Salesforce, ServiceNow, Monday.com, Asana, Chili Piper, Lean Data</p>
<p>Usage Data</p> <p>Measures user interactions with a product or service.</p>	<ul style="list-style-type: none"> • Number of logins • Features accessed • Time spent 	<p>Heap, Zendesk, Mixpanel, Snowflake, Auth0, PostHog, Jira, Helpscout</p>
<p>Buying Data</p> <p>Details about what, when, and how much customers buy.</p>	<ul style="list-style-type: none"> • Purchase history • Order size • Frequency of purchases • Preferred payment methods, • Stakeholders, Personas, Sentiment words 	<p>Clari, Gong, Hubspot, Salesforce, QuickBooks, Stripe, Bill.com, Dealhub, PandaDoc, Conga, DocuSign</p>

Instead of relying on fields being updated to meet a milestone, your new criteria should look something like this:

Demo Request Form fill (engagement data from HubSpot) OR
Intro meeting booked (engagement data from SalesLoft) OR
Setup Account in Product (usage data from PostHog) OR
Lead Score > 100 (intent data from Infer)

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Demand Capture milestone was met.

With potentially millions of data points being created through your tech stack, integrating this framework into your Data Model can be incredibly complex. Solving this problem and making this sophisticated framework easy to implement are two of the main reasons we created RevAmp.

Capture Milestone Triggers with Timestamps

With the defined criteria and the data that informs that criteria in place, your team can then build timestamps that capture when the customer met the milestone event so you can analyze your data model.

Timestamps provide the tracking data you need to understand the volume, conversion, and time between stages of your bowtie. For example, how long does a company at demand capture take to become a customer? What percentage of customers that achieve recurring value move on to upsell? Stamping the time and date when the criteria for that milestone is met provides accurate KPIs that the entire go-to-market organization can rally around.

“We have to know how long it takes us to run through a customer lifecycle,” says Rosenthal, “And we want to know where opportunities are becoming stale in our process so we can use that to coach and develop our teams and drive engagement strategy with customers.”

Wiig says that timestamps help teams understand how long it takes to win a deal and at what rate. She also notes that it’s important to understand the time of year and what’s happening in the world as you measure timestamps. “Timestamps help us understand what’s the overall production of success and what those different parts did at the different times.”

When setting up this structure, your Data Model has endless possibilities across segments, channel sources, and products.

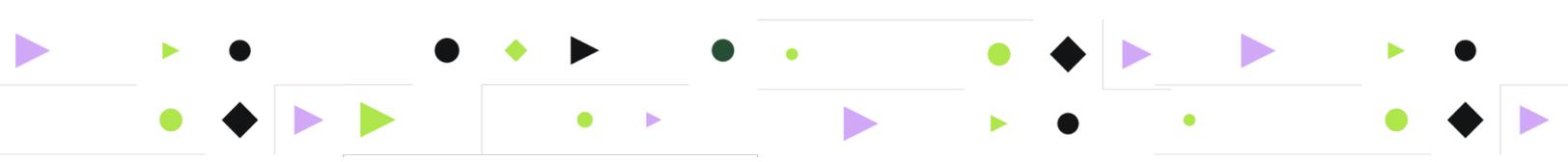
Put Them All Together to Get to the Why

Rosenthal pointed out that one of the frustrations he had with a data model was that “it doesn’t tell you what the root cause is. It’s a misnomer. The data model tells you where to look and where to investigate to find the root cause [but not identify the root cause itself].” In essence, it doesn’t tell you the “why.”

Timestamps help us understand what’s the overall production of success and what those different parts did at the different times.

– Kristina Wiig, SaaS expert

The good thing about the Data Model is that once you have the definitions, criteria, data sources, and time stamping in place, you have the variables you need to answer the “why” of what is going on in your business. These data model variables provide a structure for your org to run statistical and machine learning methods, such as sensitivity and regression analyses, across your business. The Data Model provides the framework for you to answer the “why” of a problem and helps you derive the solution faster.



Conclusion:

Turn Your Challenges Into Success Stories

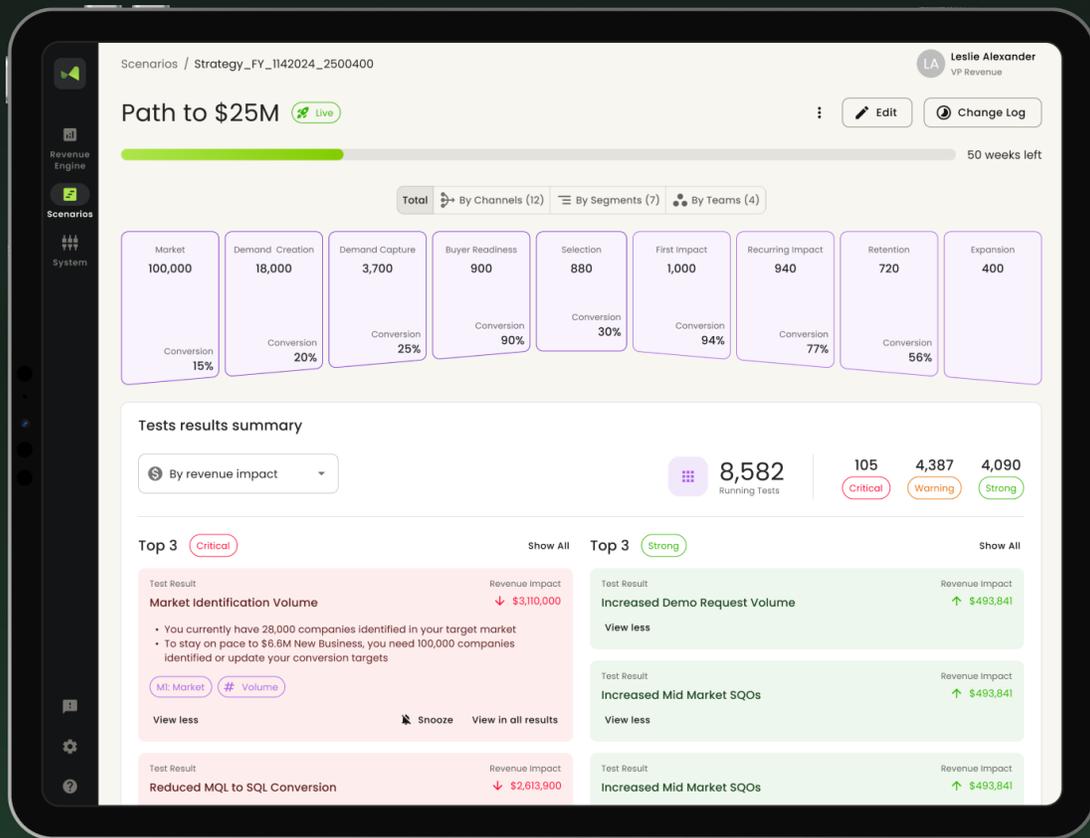
Although implementation might take some trial and error, the Data Model makes GTM a team sport and is worth the payoff once achieved.

Wiig points out that this model also gives teams that were previously left out a seat at the table. “You really didn’t have CS and account management having the same seat at the table as new acquisitions.” By making space for them, businesses enable true growth. As Wiig says, “True revenue growth isn’t just about the hunters, but also the farmers — those who will retain and grow the business. And that’s causing a massive shift in who is considered the most important person in the org.”

Once you’ve standardized your data definitions and criteria, use RevAmp to gather data from all the tools spread across your business and generate GTM insights. You will be able to tell where something is going wrong, how to fix it, and why.



See how RevAmp can help your team implement the Data Model



[Request a demo today](#)

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