

GTM PARTNERS PRESENTS

The Comprehensive Guide to Go-to-Market



SEPTEMBER 2022

These materials have been prepared by GTM Partners for the exclusive and individual use of our clients. Unauthorized reproduction is strictly prohibited. These materials contain valuable, confidential, and proprietary information belonging to GTM Partners and may not be shared with any third party without the prior approval of GTM Partners. To learn how you can become a GTM Partners client, visit www.gtmpartners.com.

Table of Contents

01

Introduction &
Gratitude

02

The Source of
GTM Complexity

03

What is
Go-to-Market?

04

Is Your Go-to-
Market Broken?

05

Solutions for Your
GTM Problems

06

The Go-to-
Market Cloud

07

Trends in GTM
Technology

Introduction

When the founders of GTM Partners started working with hundreds of companies on the concept of Go-to-Market(GTM), they came to the conclusion that there is a massive challenge facing B2B business leaders today. Though the issue can manifest in dozens of ways, it always boils down to a single concept: **Go-To-Market is broken.**

We know that to make a bold statement like that, we need data, research, and market validation to back it up. Through our Data Partnerships with G2 and Bombora, the development of the best-selling book "Move: The 4-question Go-to-Market Framework," and through the support of our founding members and vendors, we have validated that B2B leaders have a big problem to solve, and we believe that they shouldn't have to solve it alone.

When there is a universal shift in the way businesses should operate, it creates challenges and opportunities. It is our hope that those business leaders looking for a better way to drive more efficient growth in their organizations will find this guide to be the beginning of their journey to help us transform Go-to-Market. We also hope that vendors looking to improve Go-to-Market for their customers will appreciate our view that stack ranking vendors against one another without a use-case-driven solution framework makes about as much sense as arguing over the best flavor of ice cream.

In our inaugural report "The Comprehensive Guide to Go-to-Market," we will outline the source of the challenges in Go-to-Market today, describe frameworks on how to resolve them, and provide you with an impartial look at the GTM technology landscape filled with solutions that can change the way you work for the better.

Finally (despite its length), this guide is just the tip of a very large iceberg that we are determined to help business leaders navigate. So suffice it to say, we are just getting started, and we hope to have you join us in our journey and mission.

Sincerely,
Sangram, Bryan, Judd & Lindsay

Our Launch Sponsors

Thank you to our GTM Sponsors & Members and network of professionals who put their faith in us to bring the GTM revolution to life for their teams and customers – we are humbled and honored by your support.

Hushly

bombora[®]

DRIFT

OPENPRISE[™]

Sendoso

 **vidyard[®]**

 **terminus**

 **Goldcast**

 **Überflip**



Salesloft.

 **Demandbase[™]**

ON24

 **HG Insights[®]**

acoustic

 **Demandwell**

gravity
GLOBAL

The Source of GTM Complexity

The last 20 years have seen monumental changes in how buyers buy and how B2B companies market, sell, and deliver value. Suffice it to say, we could summarize all that into the **digitization of everything** – learning, buying, marketing, selling, servicing, events, remote work, and communication. This environment of instant information, lower-cost customization, and personalized experiences has increased expectations. Both buyers and the employees of B2B companies have taken center stage, forcing a positive change in the way companies must create value in order to grow. To put it bluntly, if a buyer doesn't like the way you interact with them, they will go somewhere else, and if the employee can't connect the dots from the work they do to positive company and customer outcomes, they will also go somewhere else.

8

Typical number of handoffs during the customer acquisition & delivery process

In an effort to provide these better experiences with more unique and customized outcomes, we have created specialized roles in customer-facing departments to make sure we can deliver to our growing buying committees and more complex buyers.

There was a time when we could simplify our Go-to-Market teams into Sales and Marketing. However, as the sophistication and needs of buyers have evolved and businesses have invested in larger teams with more specialized roles and resources, the concept of planning and executing a Go-to-Market strategy also has to evolve. For example, the idea that you can simply measure the success of your marketing organization via the pipeline they generate is fine for a top-line goal. However, when the skills and expectations of a highly specialized demand generation marketer are very different from the skills and expectations of a brand marketer, trying to pinpoint an issue can be a challenge. Should we fail to meet our pipeline expectations in a quarter, we often ask ourselves, "Do we have a brand or positioning problem, or are we just not reaching the right people at the right time?" The specialization that has allowed us to drive better experiences for our customers has also made it more difficult to predict and diagnose issues.

In addition to the complications within departments, the number of departments that now have a significant stake in the customer experience has also increased. Product, Marketing, Sales, Customer teams, and their supporting staff of RevOps and Enablement all have the ability to change a customer's perception of you.

People will renew or not renew a product because of product issues, because they felt they were sold something incorrectly, because it was difficult for them to implement, or because the support staff did not meet expectations.

This further complicates the issue of pinpointing the reason behind a business challenge you may be experiencing.

For example, if you start to see your expansion revenue decline, it could be because of a product issue, a messaging and positioning issue, an issue with the audience you are attracting, an issue with how you are selling, or an issue with how you are supporting the customer once they sign; even a combination of several of these challenges.

The final layer of complexity exists in the extensive number of tools and solutions available in the Go-to-Market space to "help" you pinpoint and resolve challenges. With so many products available, it can be overwhelming for a leader to decide which tools they should invest their budget and time into integrating into their teams and processes.

In short, we know from our research that it is harder than ever before to manage, measure, and correct issues in your Go-to-Market.

What Do You Mean By "Go-to-Market?"

There is confusion

Most organizations believe that GTM is owned by Marketing, Sales, or Marketing and Sales. But today's growth plays include Product-Led Growth, Community-Led, Channel/Partner-Led, ABM, Inbound, and Outbound. The metrics we measure are no longer MQLs and SQLs, they are ARR, GRR, and NRR. This shift in growth plays and metrics requires Marketing, Sales, and Customer Success to be on the same page. GTM has evolved and has become a holistic and strategic initiative. But it lacks a unifying definition and framework.

"GTM belongs to Marketing or Sales"

77%

1,000+ B2B Professionals

@GTM Partners

With every evolution, Go-to-Market becomes more complex and misunderstood. Today we are in a quagmire of data, revenue targets, teams, and an endless search for growth at all costs.

It is our view that the framework for running a GTM process will be the transformative driver of this next decade, just as the demand waterfall and flipped funnel were for the last. In the late 90s, a sales professional would have thought that sales process, plays, automation, Marketing qualifying their leads, and having their calls recorded for later coaching would be heresy.

So (not without resistance), we believe the unification of the GTM functions (Marketing, Sales, Success, Service, RevOps, Enablement, and Product) under a GTM process (not an org chart) will allow B2B companies to execute more strategically, outmaneuver their competitors, expand their markets, and drive customer lifetime value to new heights.

A New Definition for Go-to-Market

Fundamentally, Go-to-Market (GTM) is the strategies and processes by which you bring a revenue-generating aspect of your business to the right buyers and continue to deliver on their expectations to ensure they remain your customers for as long as is appropriate.

It is important to remember that GTM does not live in isolation, and in fact, is the operating system that connects and drives the three critical components of business transformation; namely **strategy, planning, and execution**. When strategy and planning are disconnected from your GTM, you will start to experience breakdowns between teams, either with disconnected processes, misaligned investments, or poor execution that could lead you to the conclusion that you made the wrong bets. Let's start with what Go-to-Market is not, which helps drive home the definition.

Go-to-Market is NOT

- A one-and-done. It cannot be “cracked” at an executive offsite.
- A strategy or a project
- Just how you do sales or how you do marketing

Go-to-Market IS

- An iterative and transformation process for your business
- Repeatable and scalable, and helps you answer billion-dollar questions like: when can we scale our business?
- A unifying force for your business



Types of Go-to-Market

Most organizations have more than one GTM type, and they absolutely have more than one Go-to-Market Motion.

Go-to-Market "types" in this context refer to the many different ways you can bring your products and services to the market. Each one of these approaches requires its own strategy and investment to ensure efficient growth.

Depending on your approach, your growth levers are going to change, and therefore, how you pull on these levers will need to be refined. For example, spending significant resources on content and lead generation activities when you have a niche marketplace that demands an outbound motion is likely to increase your Cost of Acquisition (CAC) and not provide you with the results you desire.

TYPE	GROWTH LEVER	EXECUTION
Inbound-Led	Content Marketing driving to conversion channels	Marketing harvests demand via paid, organic, social, email, to qualify and route to Sales
Outbound-Led	Coordinated and targeted account outreach	Marketing & Sales: Account-based marketing & selling, 1:1 advertising, content hubs, SDRs
Product-Led	Product-driven adoption, usage & feature discovery	Product facilitates deals, upsells, usage, expansion
Channel-Led	Develop a network of distribution agents	Enablement focus to educate & support resellers, agencies, & certified partners
Ecosystem-Led	Product integration & symbiotic relationships	App Exchanges, co-marketing, integration features
Category-Led	Create a movement around a transformative idea	Thought Leadership driven by industry experts, influencers, and happy customers

@GTM Partners

Even if your company is using only one type of GTM – “Inbound” for example – you most likely have multiple GTM Motions. A GTM Motion is a grouped set of products and segments that must be sold and serviced differently than another grouped set of products and segments. The most common example of this is when you see a company set up a different GTM Motion to serve an SMB or velocity segment vs. that of an enterprise segment. Why? Because the needs of the buyer and the requirements placed upon the GTM teams are so different that they can not be successful when assigned to the same resources.

1

Adding a New Buyer Persona or Vertical

Will you need to have new marketing, have new types of sellers, adjust your onboarding, and have success resources to satisfy the expectations of the new Persona/Vertical?

2

Adding a New Product or Service

Is the product distinct enough from your current offering that you give it a line item, you are adding new competitors, or a different set of industry knowledge is required?

3

Adding a New Geography

Can the same sales, marketing, onboarding, and success resources succeed selling and servicing the same product(s) in a new geography in the same way?

The Optionality Tax

"It turns out the product requirements and support requirements, pricing, and everything were different for Ollie and Mary, and by not deciding, we made one uninspired compromise after another and never nailed either one. In 2012, we ripped the Band-Aid off and just picked Mary." – From then HubSpot CEO Brian Halligan

This is a lesson in GTM Motions – by realizing that a single GTM Motion could not support two distinct segments, and without the resources to run two Motions simultaneously, they had to pick, choose, and declare what they would both do and not do.

The results "After" the 2012 decision speak for themselves and set HubSpot up for a decade of tremendous growth and expansion and the ability to run many GTM Motions.

	Before	After
Customer Retention	65%	82%
Revenue Retention	70%	100%
CAC	\$10K	\$11K
LTV	\$25K	\$52K
Reps	X	10x
Customers	3,855	143K
Revenue	\$15M	\$1.3B

<https://thinkgrowth.org/hubspot-s-playbook-for-going-from-startup-to-scale-up-29ab85d3a3e1>

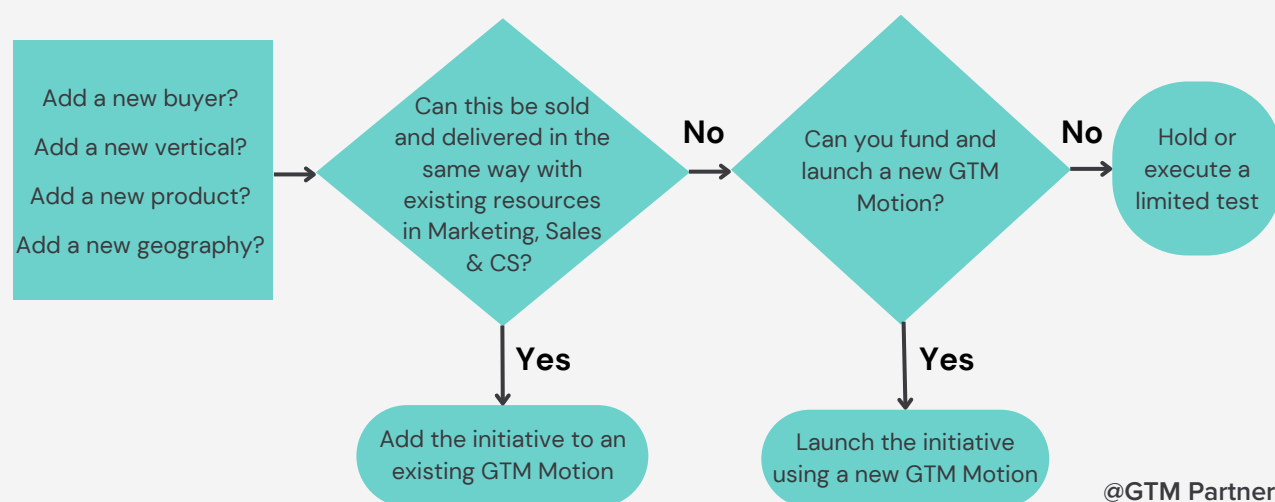
According to HubSpot, "We were acquiring customers for approximately \$10k, and we were getting a total lifetime value of approximately \$25k. We bounced around in that range for years. When we hit the gas (hired faster), the math would get worse. When we slowed down, the math would get better. We had an interesting business, but without the ability to hit the gas pedal, we'd never be able to truly scale and build the company that we envisioned."

The HubSpot team was split on exactly who their target market and ideal persona were.

Their well-intended but unfocused strategy, processes, and execution failed to meet the needs of either buyer or customer segment, which led to sluggish results.

When they ultimately decided to focus all of their resources on a specific persona and designed a Go-to-Market Motion (aligning Product, Marketing, Sales, and Customer Success) that spoke specifically to their Marketing buyer, they saw massive improvements in customer retention, LTV, customer count, and revenue.

Decisioning framework for determining whether or not you will need a new Go-to-Market Motion



In the end, it is critical to remember that Go-to-Market is rarely ever singular, and adding a new buyer persona, vertical, product line, or geography will typically require some level of investment. This could mean more money for resources, or it could mean strategically restructuring and reallocating your existing resources away from an existing revenue source in an effort to drive a new one.

The Roles of Go-to-Market

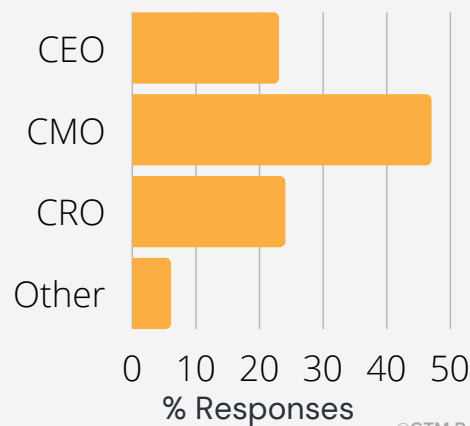
With the expansion of the Go-to-Market team, understanding the different roles and how they will drive the business forward is critical to your success.

It is common in most businesses to start small and slowly add more resources, increasing the size of your executive team, building your strategic leadership team, and eventually even adding a third layer – a manager leadership team – which are all intended to communicate updates and ensure there is alignment between different groups in the organization. Often these meetings can become unwieldy as you add new business segments and hire more experienced leaders to support an ever-growing group of individual contributors.

In an effort to reduce the chaos of these meetings, we find that many executive leaders will assign "a single owner" to a function or task in an effort to hold that one individual accountable and therefore reduce the complexity of having too many voices in the room. Go-to-Market, with its inherent complexity, is commonly assigned to a single group but is absolutely the responsibility of at least three to four teams. This creates a significant amount of pressure on these roles and how they interact with other groups.

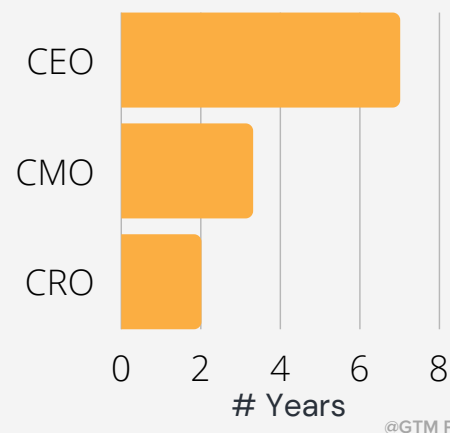
We advise that in lieu of looking for a single leader to drive the team, we should instead be creating clear and actionable strategies and assigning roles and responsibilities that will allow for the most efficient GTM team possible. The CEO should lead the way on the role assignment, looking for leaders who have the skills and tribal knowledge necessary to be successful.

Who Owns Go-to-Market



Poll – 1000+ GTM Professionals

Avg. Tenure of GTM Execs



Wall Street Journal May 2022

The following chart outlines the makeup of an ideal GTM team. Depending on the size of your organization, you may have different titles or individuals wearing multiple hats, but making sure you have all areas represented is critical to your GTM success.



Owner

Ideal Person: CEO, GM, or Division Head

Mission: Align the executive team with incentives and KPIs across the business.

Challenges: Final decision on which bets to take and which business you will walk away from. Keeping the team with varied skills a cohesive unit. Watching the long game.

Secret Sauce: Make RevOps your key partner and maintain a neutral POV. Don't be afraid to combine departments to drive better cohesion if needed.



Galvanizer

Ideal Person: CMO, VP of Marketing + CPO

Mission: Ensure there are resources assigned to create a consistent Go-to-Market process from brand experience through to customer renewal.

Challenges: Have a strong strategy and be strong in its execution. This role is subject to "big ideas" from non-practitioners that can throw your plan off course.

Secret Sauce: Do not rely on funnels to drive growth, stay connected with the CPO, CRO, and finance to expand channels as appropriate.



Orchestrator

Ideal Person: CRO, CSO, VP of Sales

Mission: Deliver the experience to future and current customers.

Challenges: Enabling your staff to execute flawlessly and maintain a pipeline of individual contributors that will be able to help you scale.

Secret Sauce: Have multiple avenues for making the revenue goal to manage the risk of unpredictable distribution channel behavior. Make your Marquee brands wildly successful and promote them extensively.



Truth Sourcer

Ideal Person: Director of RevOps, RevOps Manager

Mission: Single source of GTM performance data in the organization. Be curious, ask questions, and tease out challenges before they become problems.

Challenges: Data management and translation, avoiding data rabbit holes, avoid massaging data to tell stories because it is what people want to hear.

Secret Sauce: Have your finger on the pulse of the organization. Build solid relationships with all GTM leaders. Be prepared to be their "revenue therapist."



Unifier

Ideal Person: CSO, VP of CS, Head of CS

Mission: Maintain a customer experience that will pay dividends in the future.

Challenges: Finding the right blend of connected experiences and keeping your costs as efficient as possible.

Secret Sauce: Become best friends with your Sales counterparts, help them sell and ensure they understand the value of the relationship. Set up a customer advisory board to have non-biased customer opinion data at the ready.



Enabler

Ideal Person: Head of Enablement, VP of Enablement

Mission: Understand each role in the GTM team and educate on strategy changes. Be the source of knowledge for your GTM executives and ICs.

Challenges: Find the balance of maintaining the speed while not overwhelming your teams with change.

Secret Sauce: Keep your finger on the pulse of ICs. Create strong onboarding programs to gain trust early and understand information uptake speeds.

@GTM Partners

Is Your Go-to-Market Broken?

In this situation, broken rarely means there is a complete breakdown in your Go-to-Market approach, but in most companies, GTM is broken to some degree. The difficulty is that most leaders know **something** is wrong but can't quite ascertain the exact problem. These issues manifest in convoluted ways, and conversations with department heads seem to make sense, but initiatives that are put in place don't seem to move the needle.

The following questions can help you understand if you have some risks in your Go-to-Market and how we would advise further teasing out your opportunities to improve.

15 REASONS – WHY YOUR GTM IS BROKEN

Business is relying on heroic sales players and not plays	Yes / No
Sales, Marketing, and Customer Success are out of sync	Yes / No
You can't predict and forecast revenue for the next two quarters	Yes / No
Heavy discounting and feature wars are eroding your value prop	Yes / No
Your customers love you, but can't quantify their ROI at renewal time	Yes / No
You can't prioritize or say no to new initiatives	Yes / No
Your team is not aligned on an executive strategy	Yes / No
Your churn is killing your business	Yes / No
Your competitors are winning more market share	Yes / No
You are THE last to enter a deal cycle	Yes / No
Your team is reactive, not proactive	Yes / No
You want to go up-market but the customer base is SMB	Yes / No
Your analyst relations are weak, at best, to drive material influence	Yes / No
Your point of view is not differentiated with your product	Yes / No
You are struggling to go from a product to a platform company	Yes / No

@GTM Partners

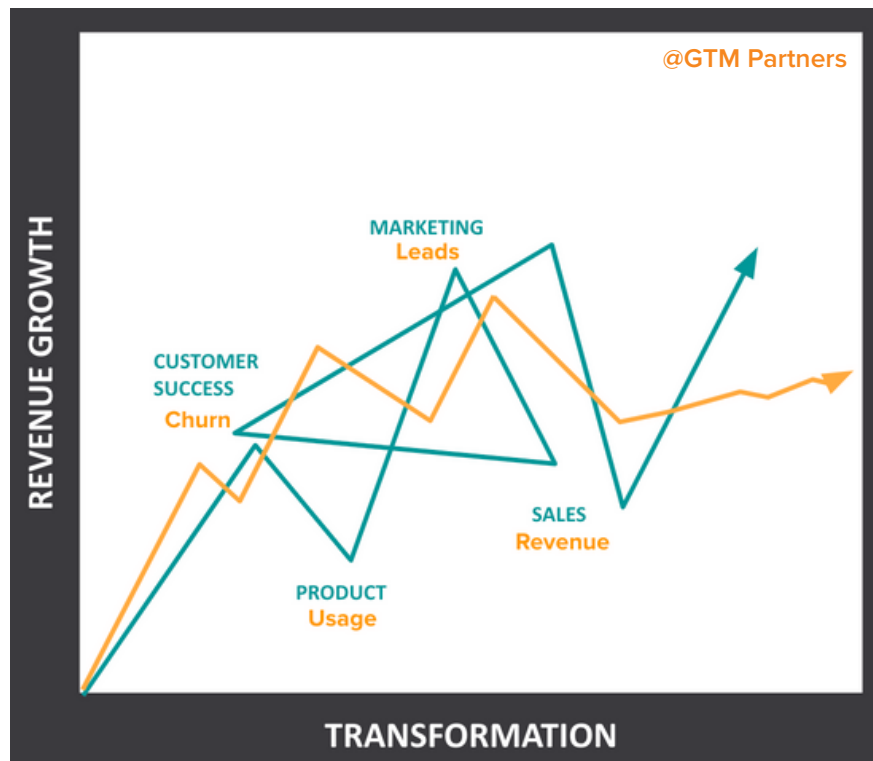
If you answered yes to more than a handful of these questions, you have some potential growth risk related to your Go-to-Market that could have long-term negative impacts on your business.

The 5 Valleys of Revenue Death

If your company has a subpar GTM process, then you inevitably end up slicing the revenue pie further with each new attempt at revenue expansion (new markets or products), rather than growing the pie.

When Marketing, Sales, and Success are disconnected, inserting more products and solutions will inflate expenses disproportionately to revenue.

This is why GTM should be an ongoing strategic objective and not a project or moment in time after a launch or acquisition. Part of the strategy is knowing that the path isn't going to be linear. It's going to be filled with peaks and valleys. Investing in your GTM capabilities gives you the ability to capitalize on the peaks and navigate the valleys.



One tricky aspect of the Valley of Death is that **you can be experiencing revenue growth and still be suffering the consequences of a failing GTM**. When your teams are out of sync, other teams *can* overcompensate and keep moving the ball forward, but inefficiently. For example, a strong marketing pipeline can cover for low sales conversion rates, and Sales can often sell ahead of product capabilities, but these are short-term fixes that create a shaky foundation that you may not be able to grind your way out of.

CREATE BUT CAN'T MARKET

You have launched a product but can't create enough demand for it.

MARKET BUT CAN'T SELL

You are generating enough demand but can't seem to close enough sales.

SELL BUT CAN'T DELIVER

You close customers but your customer team struggles to deliver or has to reset expectations.

DELIVER BUT CAN'T RENEW

Your customers love your product but can't seem to quantify the ROI enough to renew.

RENEW BUT CAN'T EXPAND

Your customers like what you do, but fail to see your value increase as your solution improves.

@GTM Partners

Valleys of Death & Mature Organizations

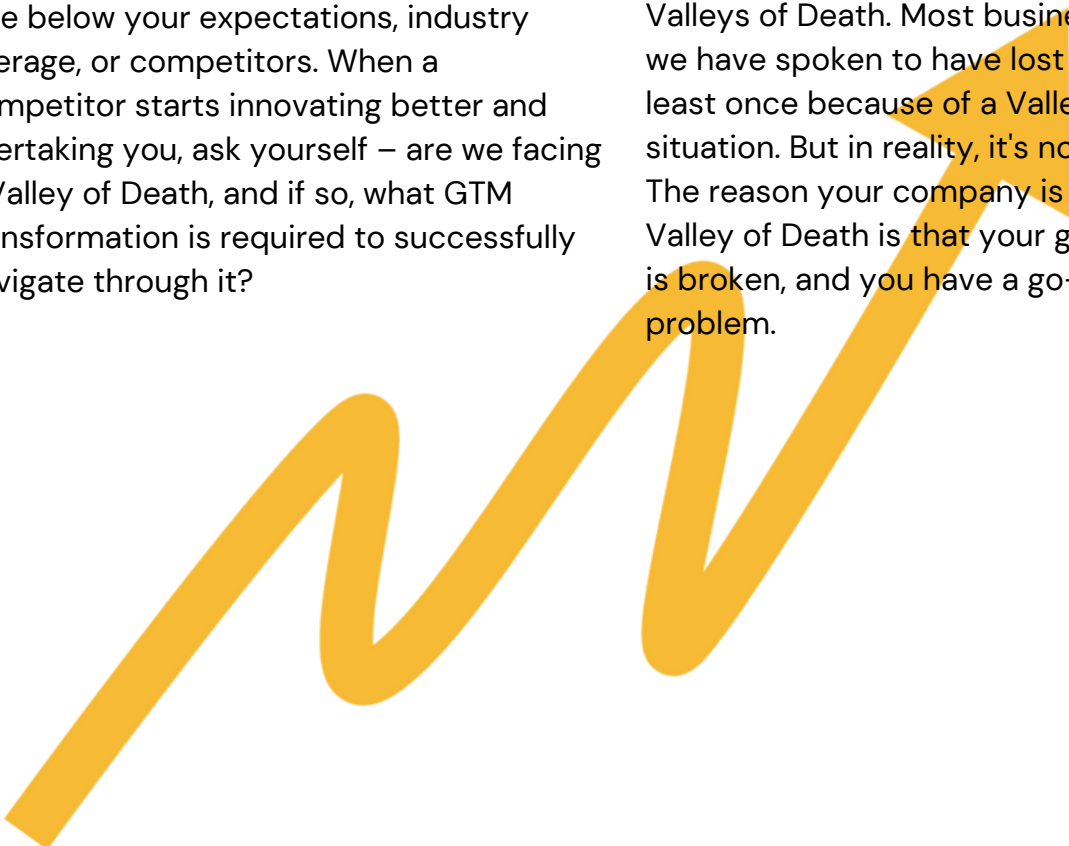
When you think about the Valleys of Death, they can feel very much like issues more related to a company getting started. For example many mature organizations have been thinking about NRR and GRR for decades – surely you have escaped the Valley? Unfortunately, larger companies will still experience the Valleys because they will face new market conditions, new competitors, changes in buying behavior, organizational restructuring, leadership changes, and the launch of a new product. There are many mature companies that have a history of success in expansion revenue that subsequently faced changes that put that success at risk. The term “Valley of Death” sounds scary, but it doesn’t have to be. By death, we mean a retraction in growth or a decline in growth rate below your expectations, industry average, or competitors. When a competitor starts innovating better and overtaking you, ask yourself – are we facing a Valley of Death, and if so, what GTM transformation is required to successfully navigate through it?

The whole point of the Valleys of Death is knowing they exist and identifying them early enough so that you can navigate them better. This is where GTM is your secret weapon. Having the right GTM process in place will ensure that you don’t plateau and fall into a Valley of Death.

When you hit these Valleys of Death, we tend to fall back into old habits and start to oversimplify our Go-to-Market problems by pointing fingers at departments and individual leaders:

- We have a marketing problem. We have a sales problem.
- We need to fire the CMO, the CRO, or the CCO.
- We need to hire more salespeople.
- We need to spend more on marketing activities.

But it's these biases that lead to the Valleys of Death. Most business leaders we have spoken to have lost their jobs at least once because of a Valley of Death situation. But in reality, it's not their fault. The reason your company is facing a Valley of Death is that your go-to-market is broken, and you have a go-to-market problem.



Strategic Planning Has Failed You

Does this sound familiar to you? A new revenue target has been set for the company. You have to 3X the existing revenue. So you do the math. Work yourself backward from the target – how many leads do you need? How many new salespeople will need to be hired? What's the marketing budget to get there, etc.?

Well, what if we told you this is the wrong approach? Hitting a revenue target is all about Go-to-Market, and you can't math your way out of this. If you approach revenue like a math problem, chances are slim that you will hit your target; even if you do, you will be cutting a lot of corners to get there.

"Mathing" your way to a revenue target is just one of the go-to-market biases that exist in the B2B tech industry. There are several more.

GTM BIASES – THE 5 "ISMS"	
Mathism	Spreadsheet over strategy
Incrementalism	Risk aversion over decision-making
Departmentalism	Team outcomes prioritized over customer experience
Growthism	Short-term wins at the cost of long-term planning
Sizism	Future possibility over near-term reality

@GTM Partners

These biases stem from the poor way in which companies approach annual strategic planning, targets, and goals. By focusing their efforts on the issues within departments, they miss the real issue – annual planning should start with strategy conversations and the trade-offs that must occur at a company level long before you ever discuss what will happen in each department.

Remember, the goal of GTM is to acquire, keep, and grow customer relationships – this kind of thinking can not be done in a spreadsheet, like the ones that produce the growth percentage target that is typically handed down to departmental leaders from finance.

Solutions to Go-to-Market Problems

The complexity of modern GTM requires a new model for how companies should run annual/quarterly strategic planning, goal setting, budgeting, and execution of the plan. Namely, we must embed the Go-to-Market process into the strategy and planning process, using it to both inform and be informed by it.

Frameworks to Fix GTM

1

M.O.V.E. Framework

The M.O.V.E. framework uses the paradigms of Market, Operations, Velocity, and Expansion to operationalize the decision-making in the strategic planning.

2

GTM Operating System

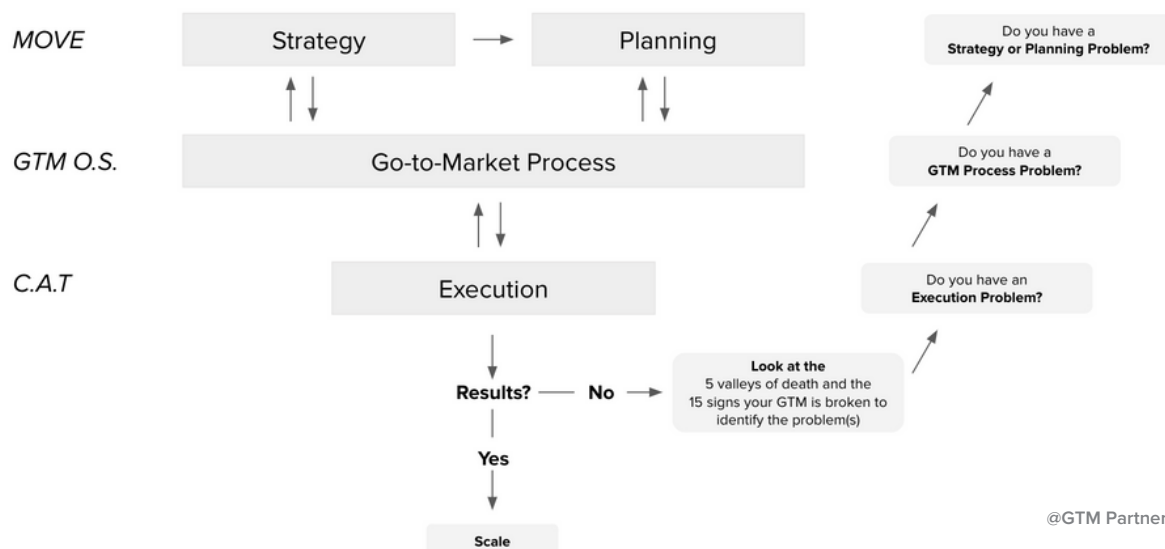
The GTM Operating System provides blueprints for how to tactically manage the execution of a successful GTM Motion.

3

The C.A.T. Framework

C.A.T. stands for Clarity, Alignment, Team & Technology and is the framework for leaders to keep their teams moving in the same direction.

Transformational Growth Business Model



@GTM Partners

The M.O.V.E. Framework

Strategy and planning processes have multiple frameworks that already exist. But GTM is about creating a transformation process and why we created the M.O.V.E. framework to help you transform and grow efficiently. The M.O.V.E. framework focuses on four key areas – market, operations, velocity, and expansion.

As part of our mission to keep go-to-market simple, we distilled the framework into four key questions:

- **Market:** Whom should we market to?
- **Operations:** What do we need in order to operate effectively?
- **Velocity:** When can we scale our business?
- **Expansion:** Where can we grow the most?

Regardless of the size of your business, which stage you are in, how much revenue you have made, or how many products you have launched, the questions will remain the same. Your answers will differ. And you keep revisiting these questions at every strategy and planning session.

The four-question M.O.V.E. framework is designed to ensure that there is clarity and alignment among your executive team. Marketing, Sales, Customer Success, and product need to all be on the same page on the answers to these four questions.

MOVE THE 4-QUESTION GTM FRAMEWORK	
WHO	Don't focus on how big the market is. Focus on the market that best matches the pain points that your product/service solves.
WHAT	Having a single source of truth in your data helps you make better business decisions.
WHEN	Have a plan to ramp up your staffing and your enablement efforts, so you can get ahead of volume, education, and change management within your organization.
WHERE	Have a plan for expansion that incorporates more than just your sales organization (e.g., partners & agencies, expand your coverage into new verticals or business types, or expand your product).

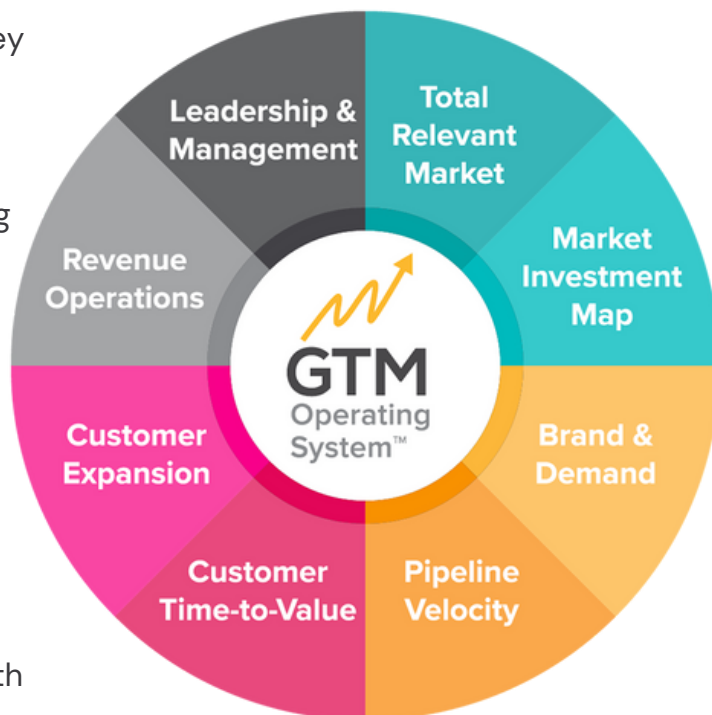
@GTM Partners

Your aim with your go-to-market framework should be to build a cohesive, trained, and responsive team that works together to understand, know, and serve the customer.

The Go-to-Market Operating System

We often hear business leaders speak to the desired outcomes as though they are the plan: “We need 3X pipeline,” “Increase NRR by 3 points,” “30% increase in revenue,” etc. However, without a systematic way of confirming you have the correct processes and investment to achieve the goal, you might struggle to see risks that could prevent you from reaching it. How do you bridge the gap between your strategic planning process and your execution?

The GTM Operating System is an 8-pillar framework that we have developed to provide organizations with a blueprint to provide clarity and alignment in their strategic planning and execution process.



How The GTM Operating System Works

The GTM Operating System is made up of many interconnected parts that will allow your Go-to-Market team to stay aligned on a common goal, both as a GTM team and within specific disciplines such as Sales, Marketing, and Customer Success. It also allows the owner of GTM within your organization to validate your strategy and understand the capacity of the GTM team.

The GTM Operating System provides blueprints for how to run a successful plan to manage the execution of a successful GTM Motion(s) across the entire company. Each pillar builds on the next, allowing you to connect the dots between teams with significantly different roles. These 8 pillars are critical to ensuring that GTM is a company-wide holistic initiative and not just a marketing and sales initiative.

For example, without having the correct positioning and branding support, Sales will struggle to make their numbers, or if your customer can't see value in your solution, having your revenue depend on expansion will become a challenge for your Account teams.

8 Pillars of The Go-to-Market Operating System

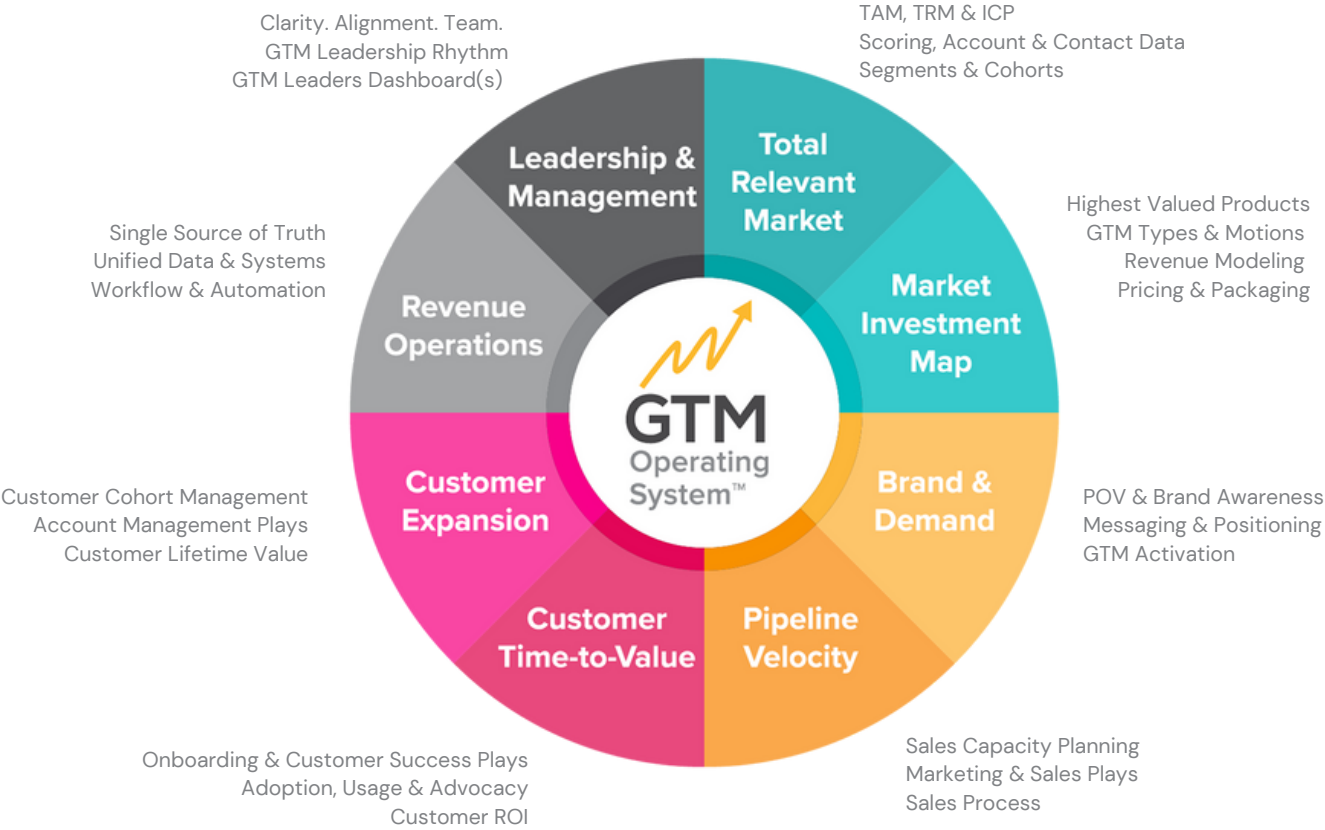
GTM PILLAR	ITS PURPOSE	CAPABILITIES
Total Relevant Market	Identify best-performing segments, customer cohorts, future possibilities	TAM, TRM, ICP, Scoring, Account & Contact Data
Market Investment Map	Identify your highest value products, sequencing, GTM types, motions	Distinct GTMs, Revenue Modeling, Pricing & Packaging
Brand & Demand	Brand strategy, point of view, create and harvest demand, budgeting	POV & Brand Awareness, Messaging & Positioning, GTM Activation
Pipeline Velocity	Building repeatable, scalable throughput and efficiencies to meet targets	Sales Capacity Planning, Marketing & Sales Plays, Sales Process
Customer Time-to-Value	Create and manage a mutually beneficial relationship with your customers	Onboarding & Customer Success Plays, Adoption, Usage & Advocacy, Customer ROI
Customer Expansion	Strategies for driving expansion in your current customer base	Customer Cohorts, Account Management Plays, Customer Lifetime Value
Revenue Operations	The analytical information needed to power and hold your teams accountable	Single Source of Truth, Unified Data & Systems, Workflow & Automation
Leadership & Management	The care and coaching required to motivate, educate, and enable your people	Clarity. Alignment. Team. GTM Leadership Rhythm GTM Leadership Dashboard(s)

@GTM Partners

By using this framework, you will be able to provide strategic and operational guidance to each of your GTM teams, help them communicate with one another, and ensure that strategy and execution handoffs are smooth and efficient as each phase in the GTM cycle continues.

The Go-to-Market Operating System

by GTM Partners



Clarity. Alignment. Team. (C.A.T.)

The final framework in our Transformational Growth Business Model is all about the people, the hardworking GTM professionals we want to help work in a more effective way. In our experience, many of the issues related to Go-to-Market are due to misalignment challenges between leadership, teams, and individual functions. Teams are filled with busy people, and without these important alignment-setting actions, different groups can go months "doing" in silos, only to find out that they have failed to "accomplish" the actual goal. It is frustrating for them and risky for leadership and the business.

C

Clarity > Certainty

This is the process of ensuring that your team understands the strategy, decisions, and corresponding goals for the business, with a complete understanding of what those goals mean within the context of their role.

While you can rarely be certain about what will happen today, next week, or next year as a business, you can and must be clear about what you are going to do and not do, and about the order and timing you will do it. Having a north star allows teams and individuals to make better decisions in their day-to-day to stay the course for your strategy.

A

Alignment > Right

Where strategy is big picture, alignment is detail and in the trenches decision-making, and agreements made in a way that everyone can follow.

Being aligned is better than being right, as it allows you to execute, learn, iterate, and ultimately transform as you go with everyone in lockstep.

The project list, prioritization, and deliverables that result from this methodology provide the relief and direction that your GTM team is craving.

T

Team > Heroism

Scale, repeatability, and efficient growth are only possible with a team mentality. With clarity and alignment in place, relying on "heroes" in the organization in order to hit goals will not be necessary and ensure you mobilize all resources effectively to maximize output and efficiency.

Additionally, this will reduce the risk your organization has should an A player team member decide to take another role and ensure the **entire team** can connect their work to the goal and feel valued, which is an important aspect of morale and mental health at work.

@GTM Partners

The Role of Technology in Go-to-Market Success

Powered by 

If you have ever spoken to someone who markets or sells software for a living, then you know that they spend most of their waking hours trying to describe and show how their technology can solve problems in your organization. This can be challenging because more often than not, technology alone cannot solve problems – we must first define our Go-to-Market and then determine the solution that will give us the most return on our investment.

In partnering with G2, we have reviewed the most common trends in Go-to-Market technology buying over the past 5 years to observe what solutions people are looking for and where they are choosing to spend their budget.

Over the last 4 years, we have seen a remarkable increase in awareness by B2B companies of the need to evolve the way they Go-to-Market.

Digitization of the buying process, the need for efficient growth, and of course, the COVID pandemic, have accelerated the need for this Go-to-Market transformation.

For buyers of software, this section will help you see in aggregate what the market is choosing to spend their time and money on as well as the types of problems or "use cases" they are looking to have addressed.

For software vendors, it is important to understand that while you may be fighting for a specific budget line item, when viewed holistically, you need to consider how your categories are trending and where other categories may be picking up steam, and what that might mean for your growth expectations.



The Go-to-Market Cloud

The GTM Cloud represents the software solutions that align with the 8 pillars of the GTM Operating System. In defining the characteristics of the cloud, we wanted to ensure that we never did a blanket "stack ranking" of the vendors. The right software solution for you has much more to do with your specific strategy and the use cases it must satisfy, rather than an arbitrary list of features you may never have a use for. Solutions are included in the GTM Cloud when they can support at least one of the following goals:

1

Provides Strategic Data & Experiences

Vendors who provide solutions offering GTM intelligence, planning, and enablement of experiences that drive the actions for your teams and customers.

2

Supports GTM Team Execution

Allows for a deeper unification of your GTM process, improving your Clarity, Alignment, and Team while driving execution.

3

Supports Multiple GTM Departments

The GTM pillars have natural departmental alignment (e.g. Brand & Demand = Marketing), but many of those solutions can support other teams (Sales).

As we have discussed, a strong Go-to-Market team relies first upon its leadership to build unity between teams, followed by the creation of a well-thought-out and tested strategy on how to achieve expectations, and finally, on the processes defined to ensure that the Go-to-Market Motions are fully developed. Once we have those elements in place, it is up to the teams to execute across Product, Marketing, Sales, and Customer Success.

Steeped in the principles outlined in the GTM Operating System, the GTM Cloud highlights software that can make the strategy and planning work, the collaboration between teams happen, and the process that drives execution a reality.

Using data from G2, we aligned the following categories (see table below) to G2's category definitions to observe recent trends for how B2B professionals research, adopt, and get value from their Go-to-Market technology investments.

Solutions in The Go-to-Market Cloud

GTM PILLAR	RELEVANT CATEGORIES (EXAMPLES)
Total Relevant Market	Buyer Intent Data Tools, Account Data Management, Account Scoring, Engagement Data, Business & Sales Intelligence
Market Investment Map	Product Management, Customer Journey Optimization Product Analytics
Brand & Demand	Digital Ads, Social, SEO, Marketing Automation, Lead Mgmt, Direct Mail, Event Management, Live & Managed Chat, Partner Management, Account-Based Marketing, Content Exp Platforms
Pipeline Velocity	Sales Engagement, Conversation Intelligence, Account Intelligence, Sales Analytics, CPQ, Sales Process Experience, PRM, Demo Experience, Competitive Intelligence
Customer Time-to-Value & Customer Expansion	Client Onboarding, Customer Success Training, Conversation Intelligence, Production Adoption Platform, Customer Portal, Customer Advocacy, Learning Platforms, Social Customer Service, Customer Self-Service
Revenue Operations	Revenue Operations & Intelligence, CRM, Lead-to-Account Matching and Routing, Analytics Platform, Data Cleansing and Automation, Attribution
Leadership & Management	Coaching, Employee Engagement, Learning Management Platforms, Learning Experience Platforms, OKR, Performance Management, Employee Enablement

@GTM Partners

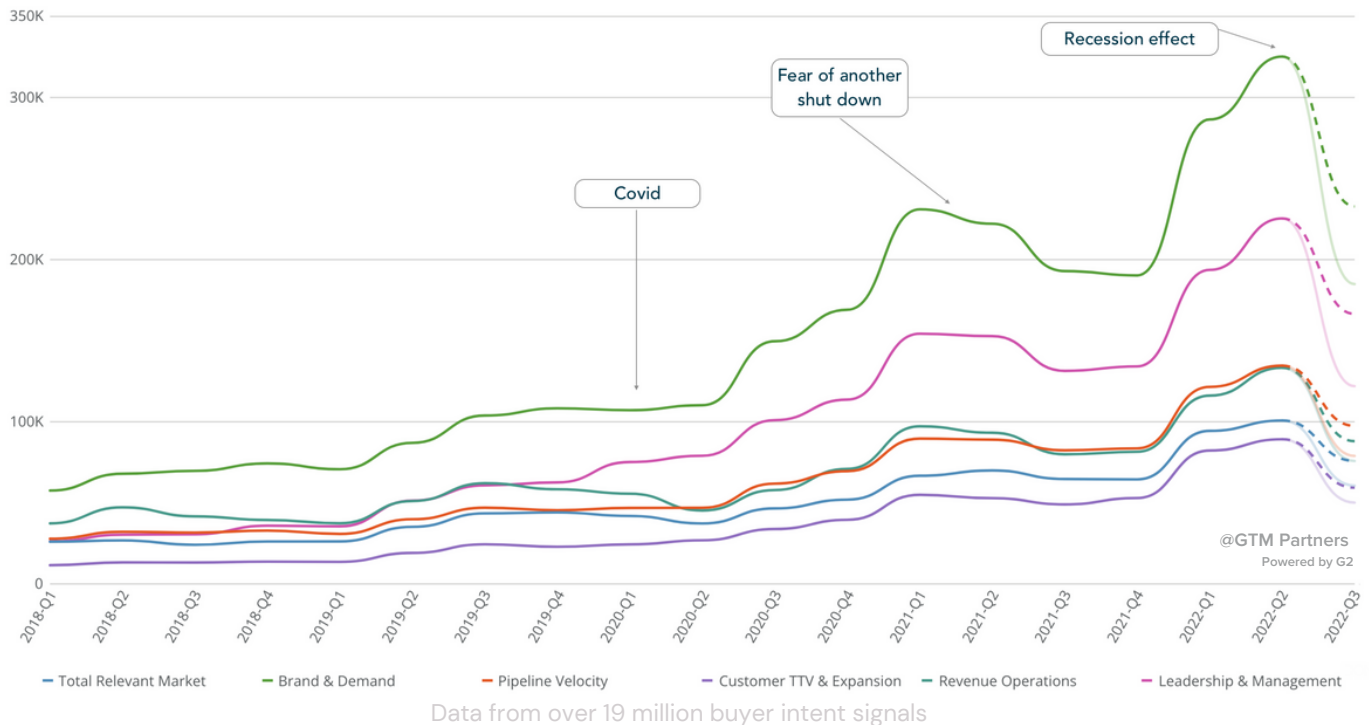
Categories in the Go-to-Market Cloud

by GTM Partners



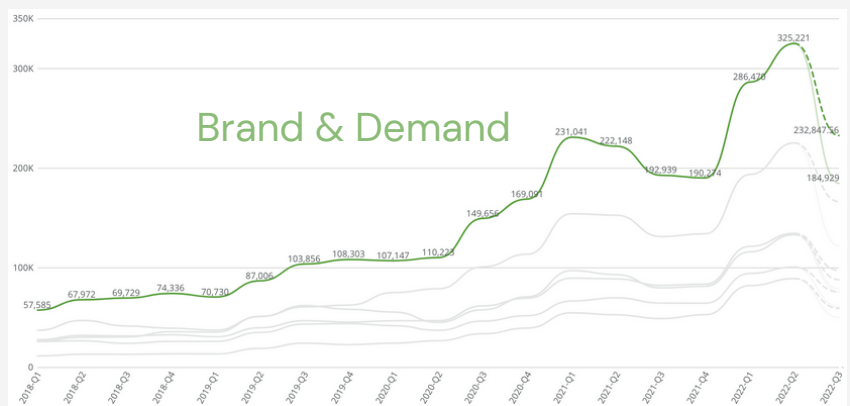
The Search For Better B2B Go-to-Market Capabilities & Strategies

The tremendous difficulties of the past few years drove "need to grow" through the roof, sending a massive wave of B2B professionals searching for better solutions.

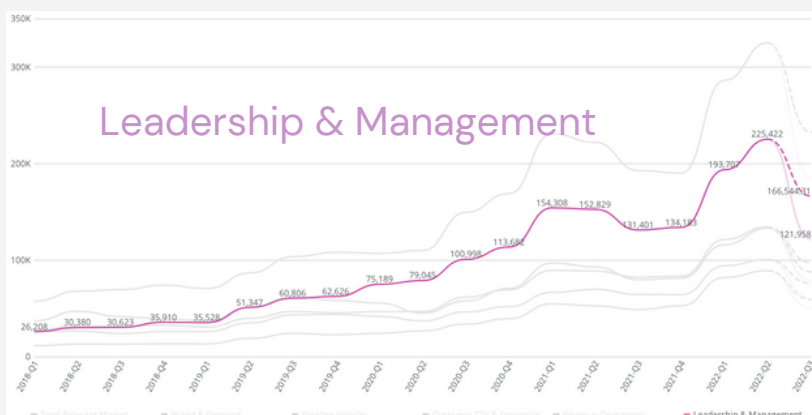


The Secret Sauce of Marketing

Marketing has tremendous flexibility to ramp up and ramp down spend based on opportunity and risk.



Leadership & Management



Unprecedented Investment in People – Pre-Recession

Under the backdrop of COVID and the great resignation, executives & boards doubled down on investments to better support, train, and empower their people.

@GTM Partners
Powered by G2

Key Takeaways for Go-to-Market Buying Trends

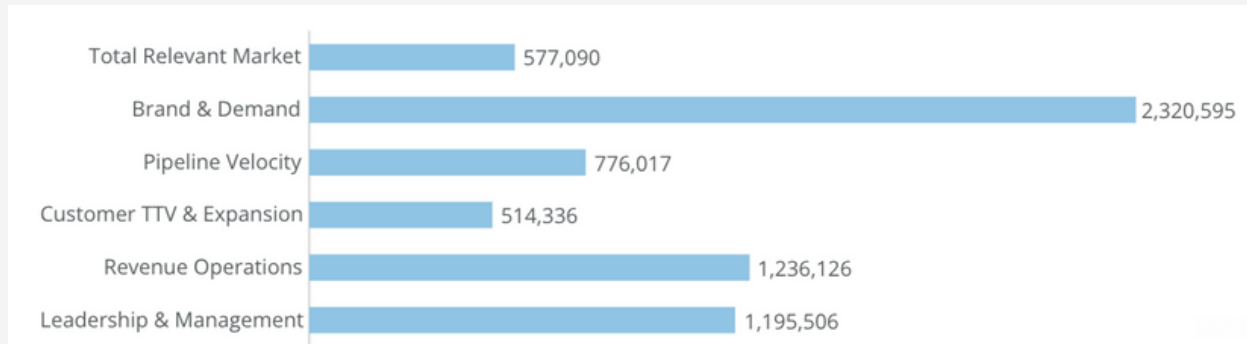
These trends highlight a clear direction in Go-to-Market evolution and the importance of the 8 Pillar Go-to-Market Operating System.

3.9x	Demand for software focused on identifying the most ideal and in-market customers is up 3.9x since 2018
4.9x	Demand for software focused on driving growth through marketing initiatives is up 4.9x since 2018
4.8x	Demand for software focused on driving sales velocity is up 4.8x since 2018
7.7x	Demand for software focused on driving growth by improving existing customer outcomes is up 7.7x since 2018
3.6x	Demand for software focused on driving efficient growth through RevOps is up 3.6x since 2018
8.6x	Demand for software focused on helping leaders unify and strengthen their GTM teams is up 8.6x since 2018

GTM PILLAR	PRE COVID	POST COVID	LAST 4.5 YEARS	TRANSFORMATION ACCELERATORS
Total Relevant Market CMO, CPO, CRO	61%	141%	287%	Avoid spending marketing dollars on non-targets, better market & sales intelligence
Brand & Demand MARKETING	73%	185%	393%	Create & harvest demand differently, engaging buyers in new ways (digitally), flexibility to throttle spend
Pipeline Velocity SALES	68%	187%	383%	Need to better arm and systematize sales teams while accelerating ramp to productivity – sales tenure declines
Customer TTV & Expansion CUSTOMER SUCCESS	111%	266%	674%	Need for efficient growth driven by macro economic uncertainty has companies focused on NRR & GRR
Revenue Operations OPS & FINANCE	49%	140%	257%	Need for greater predictability, a single source of truth, data-driven decisions & execution, unified data & systems
Leadership & Management EXEC & ENABLEMENT	187%	200%	760%	Need to manage, support, train, incentivize, & retain employees in a remote & health-focused environment

@GTM Partners
Powered by G2

B2B Professionals Searched G2 Over 7 Million Times Last Year for Solutions to Their Go-to-Market Challenges

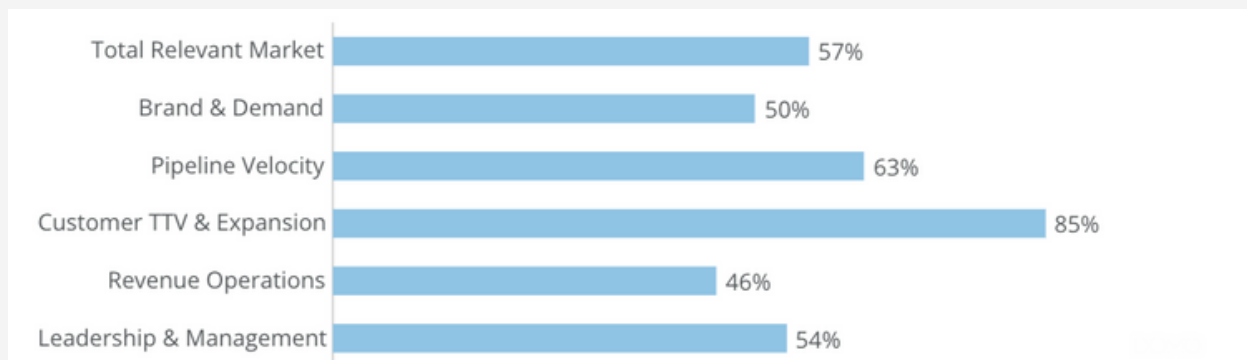


Note: If 20 people from one company searched G2 on the same day for the same solution it is counted as 1 search in this chart.

@GTM Partners
Powered by G2

Customer is Key to Driving Efficient Growth and NRR

Solutions that drive customer time-to-value and customer expansion growing fastest, up 85% YoY, pointing to a shift in leadership posture towards the emphasis on Net Revenue Retention (NRR).

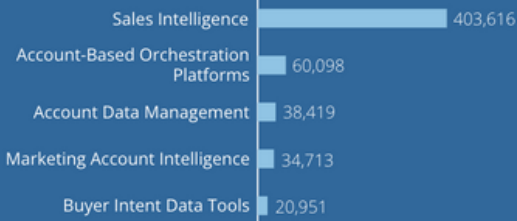


@GTM Partners
Powered by G2

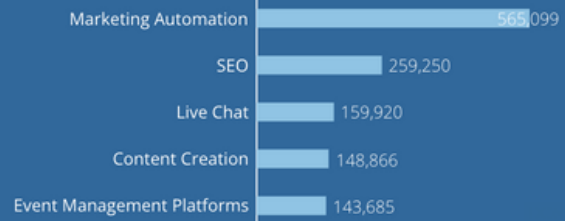
Top 5 Most Researched Categories on G2 Across the GTM Pillars

Sales Intelligence, Conversation Intelligence, Analytics Platforms, SEO, and Learning Platforms becoming foundational – CRM and Marketing Automation are ubiquitous.

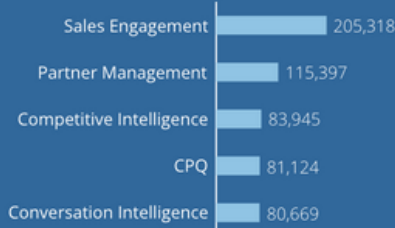
Total Relevant Market



Brand & Demand



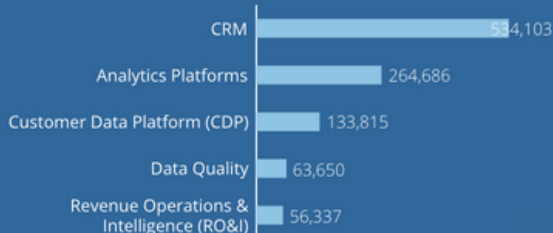
Pipeline Velocity



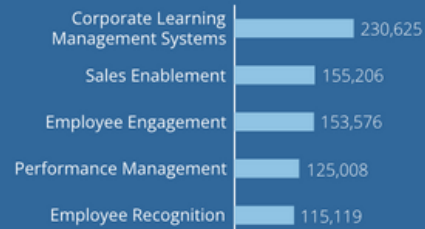
Customer TTV & Expansion



Revenue Operations



Leadership & Management

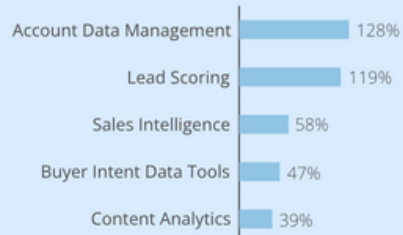


@GTM Partners
Powered by G2

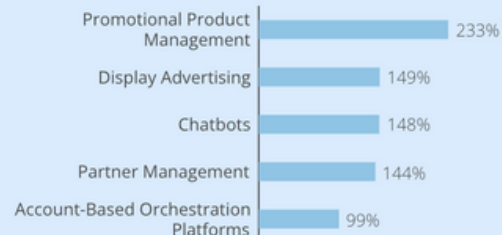
Top 5 Trending Categories on G2 Across the GTM Pillars

Sales Coaching, Presales, Digital Sales Room, Social Media Marketing, and Promotional Product Management represent the fastest-growing YoY solutions and show us where Go-to-Market leaders are going next.

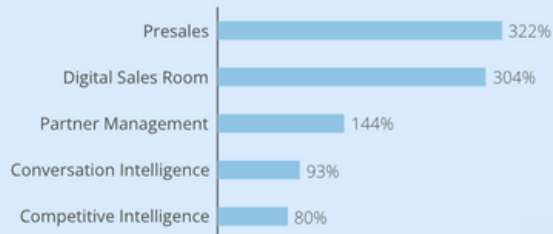
Total Relevant Market



Brand & Demand



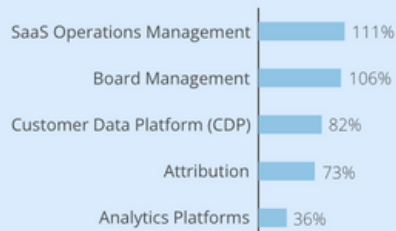
Pipeline Velocity



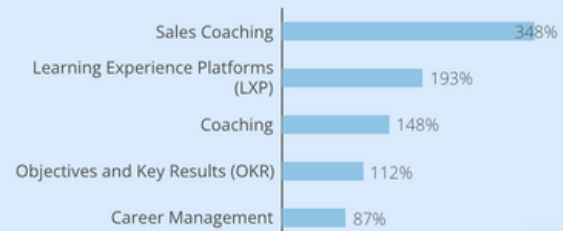
Customer TTV & Expansion



Revenue Operations



Leadership & Management



@GTM Partners
Powered by G2

Most Widely Adopted Go-to-Market Pillars

Using the last 4.5 years of G2 Reviews as a proxy for what teams are adopting most, Marketing continues to lead the way with technology adoption while customer orgs use the fewest tools. With the increased focus on NRR, customer org leaders will need to expand their views that "selling" more value to the customer is not contrary to what's best for the customer.

Q. How Does Your Go-to-Market Tech Stack Adoption Compare?

240,000 responses via reviews

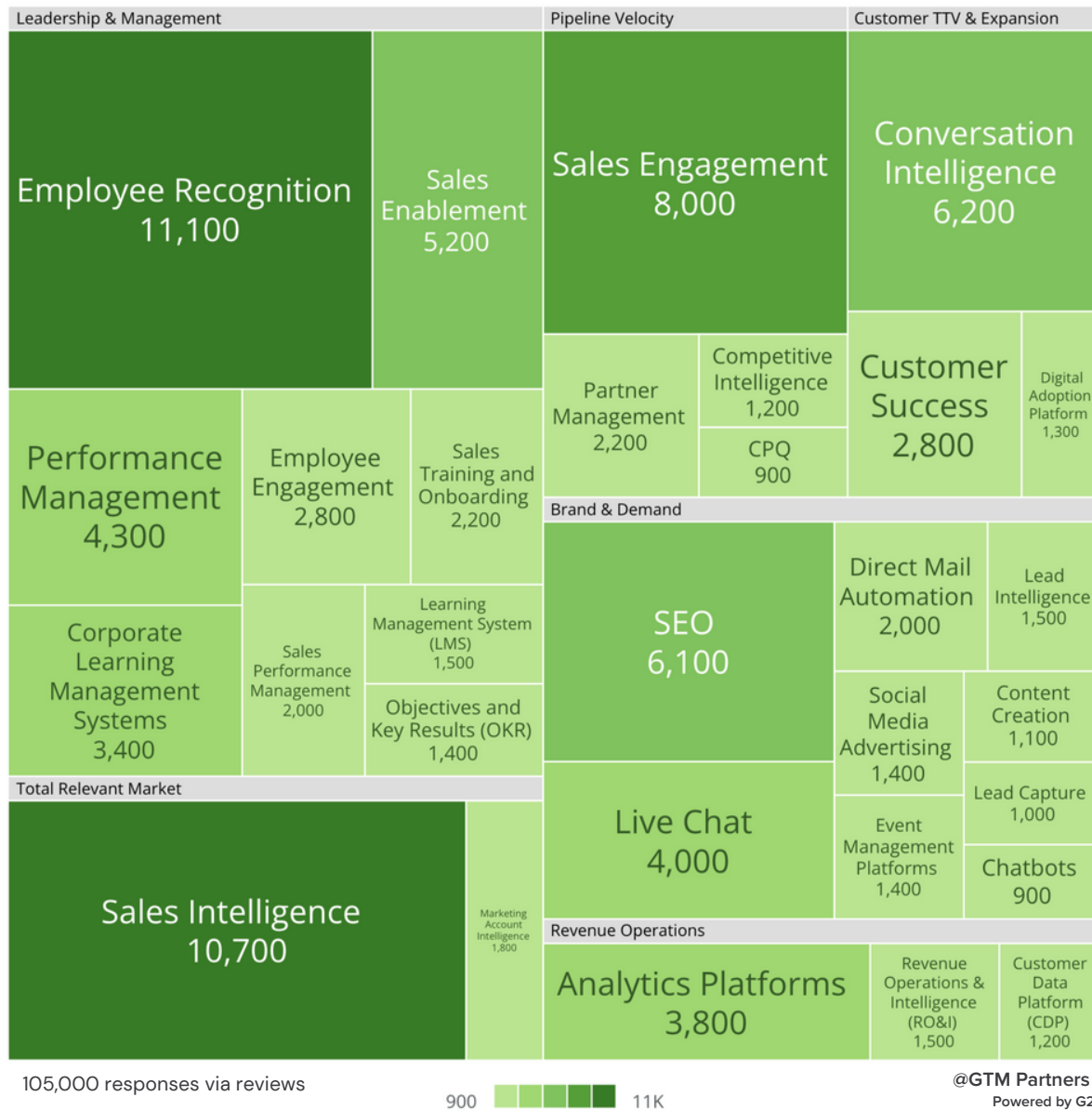
Brand & Demand	86.6K	36.1%
Leadership & Management	51.0K	21.2%
Revenue Operations	39.3K	16.4%
Pipeline Velocity	22.5K	9.38%
Total Relevant Market	21.7K	9.04%
Customer TTV & Expansion	19.0K	7.92%

@GTM Partners
Powered by G2



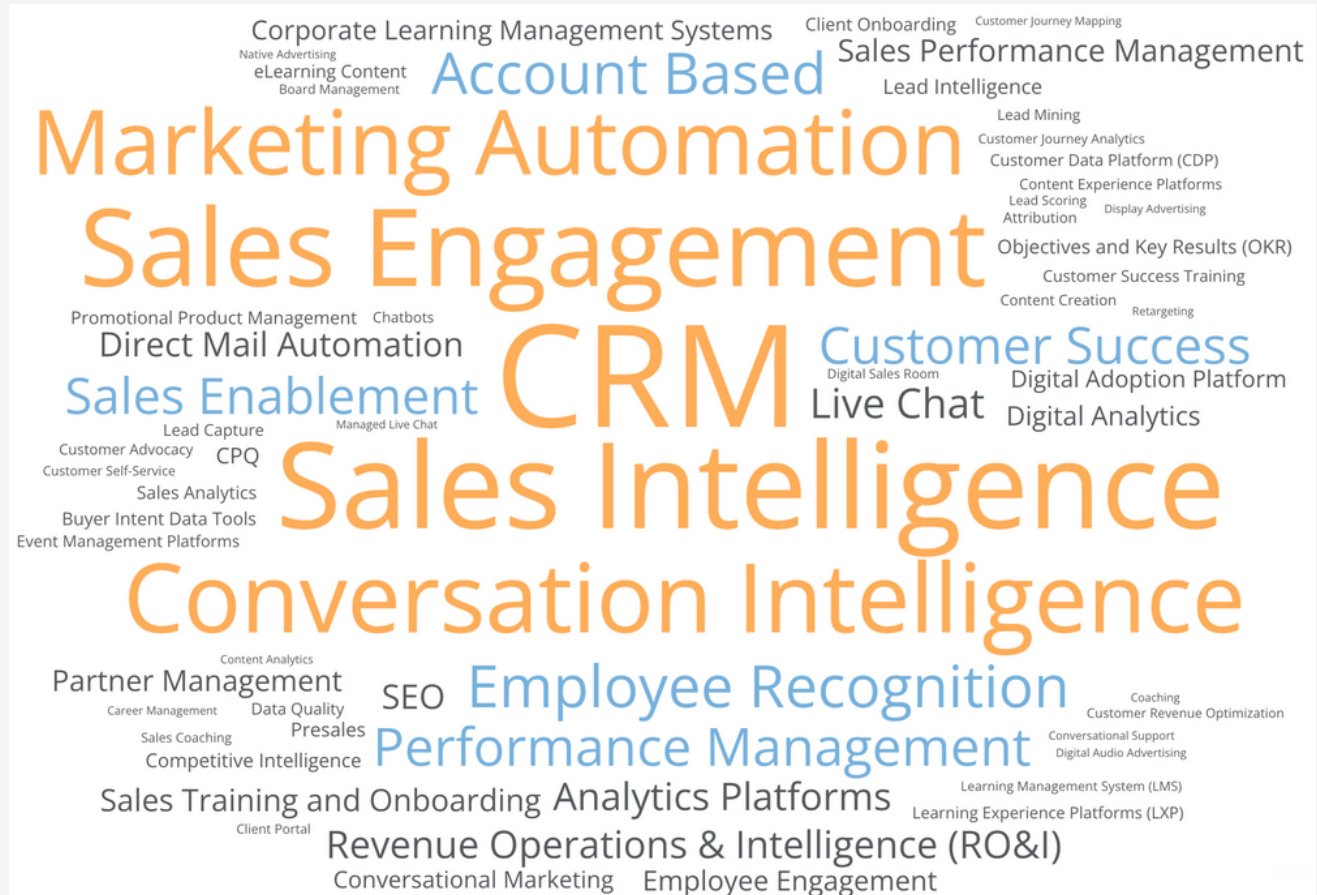
Top 20 Most Adopted Go-to-Market Solutions Since March 2020 (COVID)

Another growing trend in the past 2 years is the increased investment in employee solutions, tools, data, and learning – how companies shifted focus to ensure their go-to-market teams were most successful during a period of massive transformation.



Most Adopted Go-to-Market Solutions Last 5 Years

These are the solutions that have shaped the Go-To-Market transformation occurring over the last 5 years within the Computer Software industry specifically.



62,000 responses via reviews

@GTM Partners
Powered by G2

Product Usage Trends

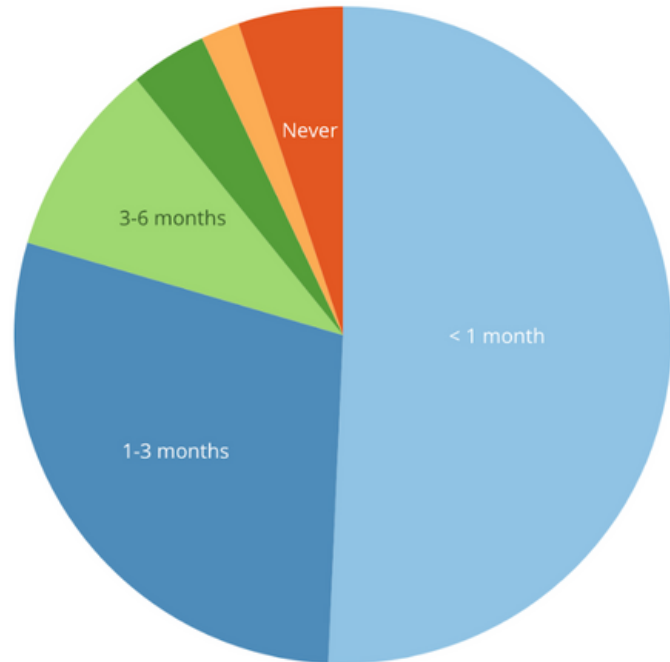
Implementation success is often linked to the customers willingness to expand the relationship specifically in competitive markets. Over half of the solutions reviewed are able to be deployed in less than 1 month. That said, a customers expected time-to-value for a given solution should be benchmarked against the category.

Q. How Fast Can Your Go-to-Market Tech Be Deployed?

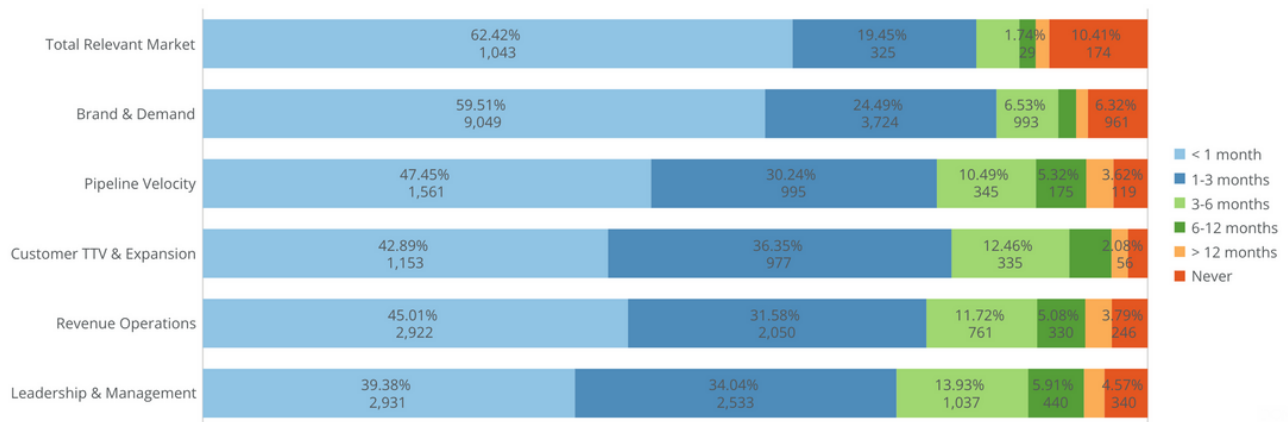
37,000 responses via reviews

< 1 month	18.7K	50.7%
1-3 months	10.6K	28.8%
3-6 months	3.55K	9.64%
6-12 months	1.38K	3.76%
> 12 months	700	1.9%
Never	1.90K	5.15%

@GTM Partners
Powered by G2



Looking at the pillars of the Operating System, the Total Relevant Market solutions, like intelligence data, can be quick to turn on and deploy and start to make an impact on a companies business. Leadership & Management solutions that help teams improve performance and productivity take more time to set up and roll out.



@GTM Partners
Powered by G2

Return on Investment is critical for renewal

Nearly 50% of Go-to-Market solution investments can provide their return within 6 months.

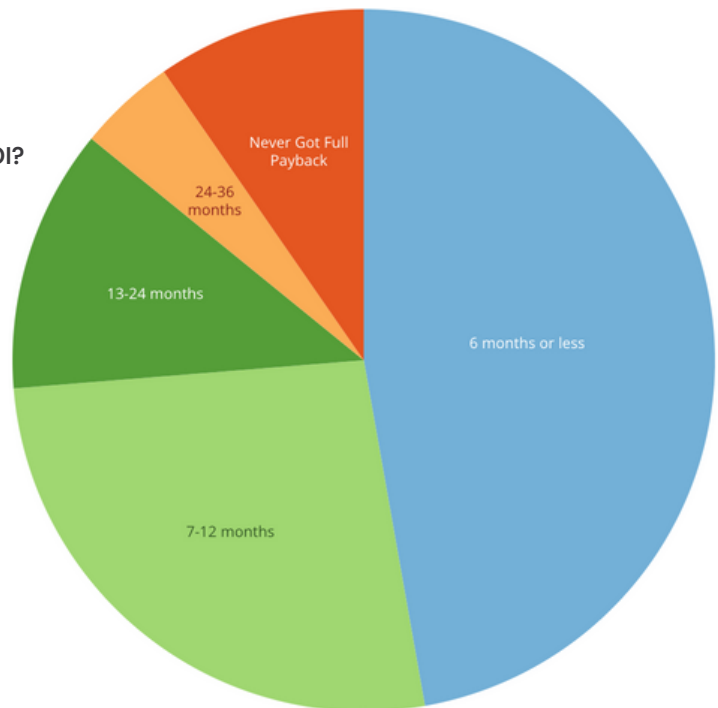
Q. How Fast Can Your Go-to-Market Tech Return ROI?

37,000 responses via reviews

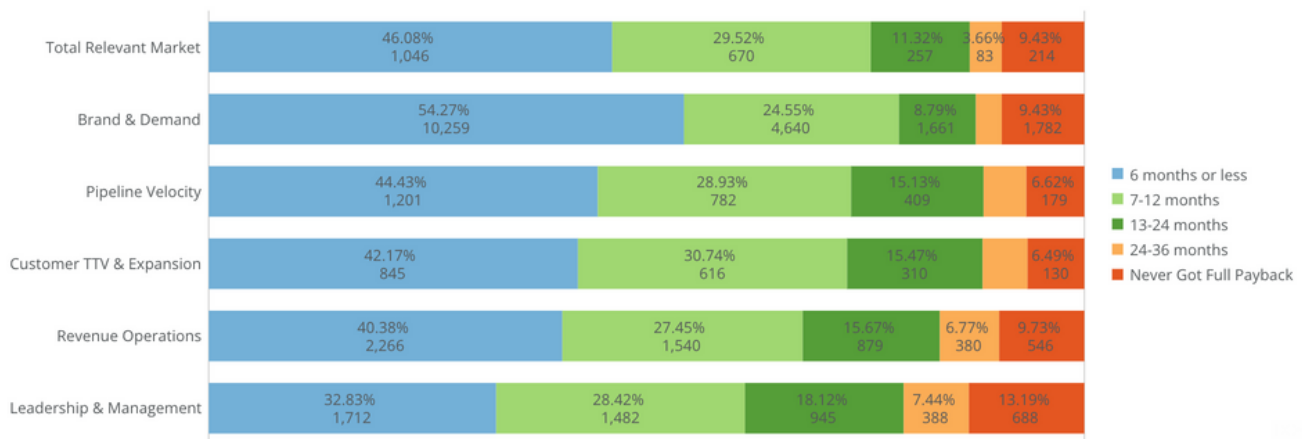
6 months or less	17.3K	47.2%
7-12 months	9.73K	26.5%
13-24 months	4.46K	12.2%
24-36 months	1.65K	4.48%
Never Got Full Payback	3.54K	9.64%

@GTM Partners

Powered by G2



Investments in marketing have the fastest time to ROI, especially point solutions, whereas Leadership & Management investments that help teams improve performance and productivity take more time to see results.



@GTM Partners

Powered by G2

Closing Words

This document aims to provide organizations and vendors with a comprehensive guide to Go-to-Market. GTM is not a one-off and neither is this guide. We will continue to evolve this guide in the months ahead. Our goal with this guide is to provide you with not just the WHY but also the HOW. This means diving deeper into the models, frameworks, data, and trends of GTM.

We will also work with our vendors to create perspective briefs for their solutions. Our goal is to break away from the traditional stack ranking of vendors to a use case-based approach. This allows future customers of a GTM vendor to receive their expected return on investment, maximize product usage and have the right people managing the product.

For our members, we will provide detailed guides, tools, and guidance you can use to make all of this information come to life in your organizations and for your teams.

The next guide will be a deeper dive into our GTM Operating System.

We look forward to being your impartial Go-To for Go-to-Market, as we continue to evangelize what true "Go-to-Market" means for B2B organizations.

About GTM Partners

About GTM Partners

GTM Partners, a data-driven Go-To-Market Analyst firm helps organizations and GTM vendors to achieve efficient growth by transforming their GTM strategy. We work with high-growth companies to help them unify their GTM teams and to provide them with lasting strategies and frameworks. GTM Partners with a mission to make Go-To-Market simple aims to be the voice of the industry for all things GTM.

We do this by offering:

1. Data and benchmarks collected from data providers, including G2 and Bombora, as well as our community of the world's fastest-growing companies.
2. Research, best practices, and design frameworks to provide guidance on the best-in-class approaches to strategizing, executing, and tooling your Go-to-Market approach.
3. Personalized advice and support from experienced leaders and practitioners that help you address business challenges in a manner that is authentic and specific to you. Our consulting work focuses on areas such as Go-to-Market strategy, creating a Point of View, and Go-to-Market project execution strategy across the 8 pillars of GTM.
4. Events and networking with industry leaders looking to define the category of Go-to-Market and revolutionize the way we create value for our organizations.

About the analysts

Bryan Brown, Chief Analyst

Bryan is a SaaS pioneer and thought leader in the marketing and sales tech industry. He has both created and brought to market innovative software products and ideas while helping thousands of companies in their effort to grow revenue more efficiently. Bryan is a co-founder with multiple exits (Vtrenz) has led strategy teams in Fortune 100 Companies (IBM) and has helped multiple organizations scale their products & Go-to-Market approaches from point solutions to platforms via organic product development and through mergers & acquisitions (Silverpop, Terminus). His work over the years has been instrumental in forming new categories and securing top placements for his companies in both the Forrester WAVE and Gartner Magic Quadrant reports.

Lindsay Cordell, Senior Go-To-Market Analyst

Lindsay is a practitioner turned analyst who studies best practices and trends in Go-to-Market and develops actionable models and blueprints for our clients. She has held both practitioner and leadership roles in almost every aspect of Go-to-Market, including Product, Marketing, Sales, Revenue Operations, and Enablement for several Fortune 500 companies, including AT&T, Hearst, and Cox. She most recently ran the GTM Center of Excellence for the Account-Based Marketing Platform Solution Terminus.

Sangram Vajre, Co-founder and CEO

Sangram is a three-time best-selling author and co-founder of several organizations, including Terminus, The Peak Community, and most recently, GTM Partners. Sangram has been at the forefront of B2B marketing trends, the Flip-my-Funnel movement, and defining the Account-Based Marketing category, ushering in a new generation of marketers. He has previously held CMO roles at Pardot, a Salesforce company, and Terminus.

To find out how GTM Partners can help you with efficient growth and revenue, contact us at:

Web: www.gtmpartners.com

Email: analyst@gtmpartners.com