

SaaS METRICS PALOOZA

How to Operationalize GTM Data to Improve Your SaaS Metrics



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So, you know your
SaaS metrics...

Now, how do you
improve them?

SaaS Magic
Number

CAC Payback

CAC Ratio

NRR

GTM Efficiency

LTV/CAC

GRR

Logo Retention

Metrics & Analytics Exist to Answer Questions

SaaS Metrics

Report on Performance

What?

Comply with Board & Investor reporting requirements

GTM Operational Analytics

Improve Performance

Why?

Guide decisions & actions to improve GTM outcomes

What If?

Inform models that drive predictability

Companies that invest in robust GTM operational analytics:

Source: BCG



- ✓ 100-200% increase in digital marketing ROI
- ✓ 10-20% increases in sales productivity
- ✓ 30% reduction in GTM expenses

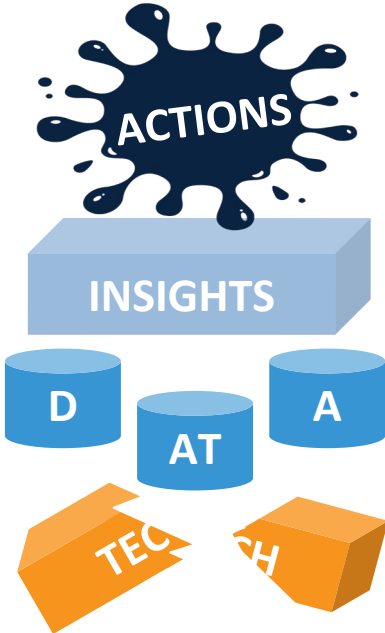
Passive GTM Reporting

Gut feel decisions that aren't data driven. Often make the situation worse.

Data not presented so it's easy to do analysis & infer actions.

Data stuck in silos & plagued with hygiene issues.

Tech stack configured by amateurs - not properly instrumented.



Actionable GTM Insights



What are all the possible **actions** that can be taken to improve GTM performance?

What **insights** do we need to have that would compel us to take those actions?

What **data** do we need and how should it be presented to produce those insights?

How do we need to configure the **tech** or change **processes** to produce that data?

Data Drives Action Framework™

Example:



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Example: Change Channels



What are all the possible **actions** that can be taken to improve GTM performance?

Change People

Change Processes

Change Channels

Change Investment Levels

Change Pricing/Packaging

Change Markets/ICP

Change Products/Services



Example: Change Channels

ACTIONS

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INSIGHTS

What **insights** do we need to have that would compel us to take those actions?

Which channels have the best/worst ROI?

Which channels are the most scalable and can grow the most?

Which channels can best drive scaleable, efficient growth?

Which channel mix will maximize near term bookings?



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What **data** do we need and how should it be presented to produce those insights?

Lead-to-deal full-funnel analytics

- Volume
- Conversion Rates
- Time

Costs attributed to ToFu, MoFu, and BoFu

Historical NRR by channel



Action Dashboard Answers: What Channels Have the Best ROI?

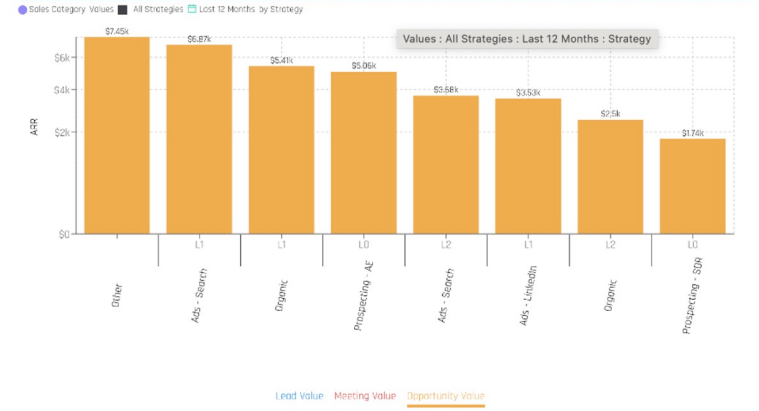
- Insight Panels
- Analyst Reports
- Diagnostic Tools
 - Conversion Diagnostics
 - Pipeline Diagnostics
 - Flex Tables
 - Saved Charts
- Event Log
- Data Hygiene
- Admin

Data Drives Action - Channels

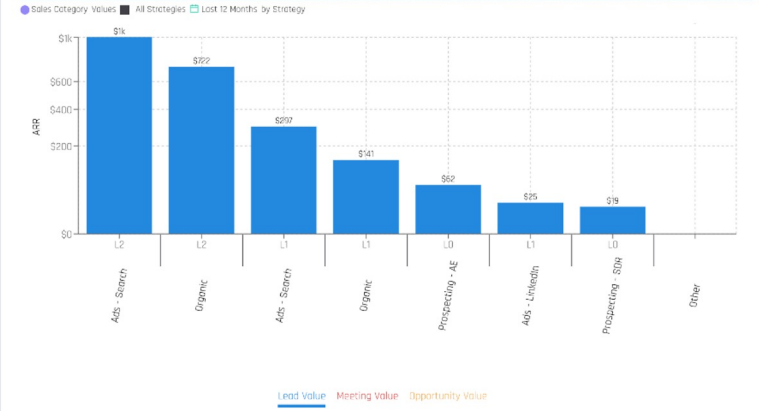
Created on: Aug 14, 2024 [Rml](#) Folder: Shared/Data Drives Action [🔗](#)

What channels have the best ROI?

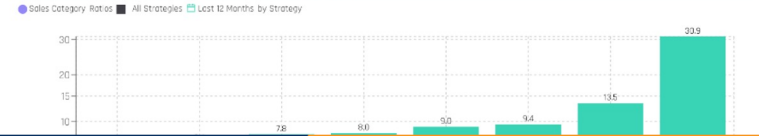
Value of an Opportunity by Channel - Last 12 Months



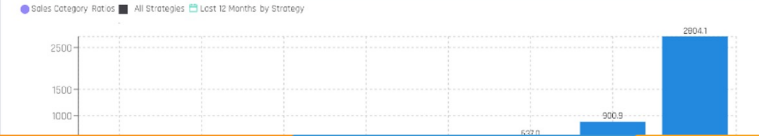
Value of a Lead by Channel - Last 12 Months



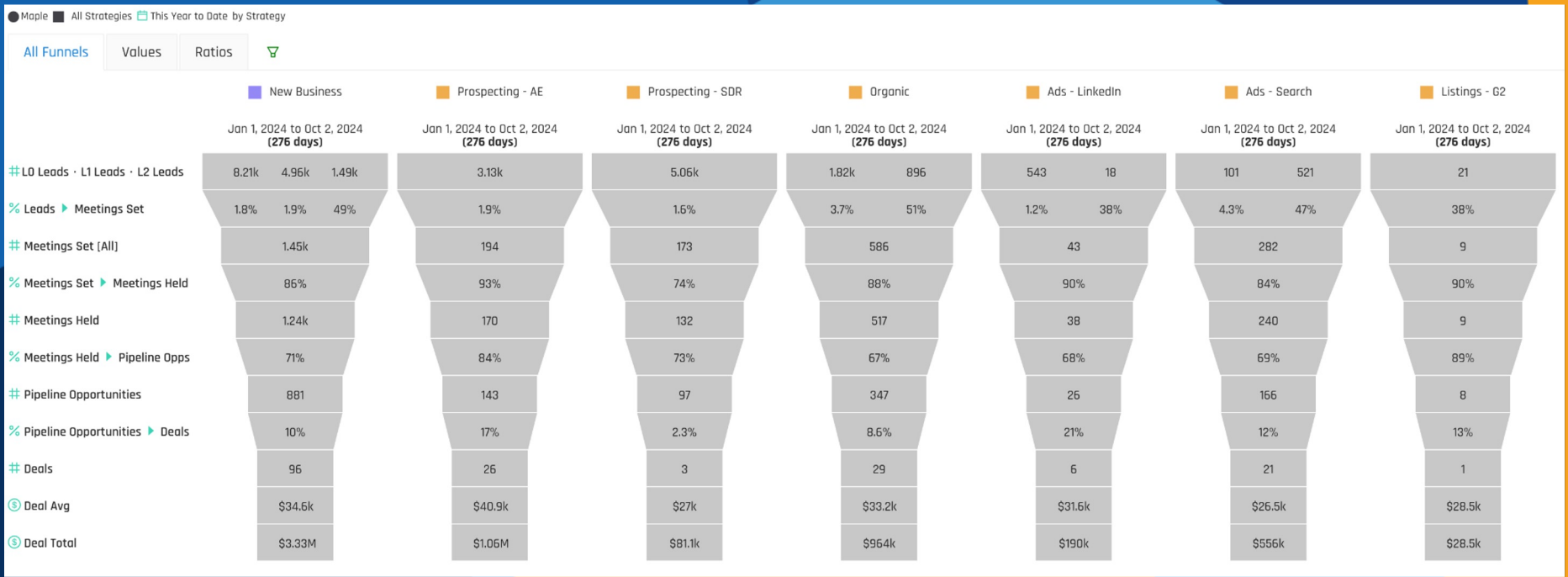
Ratios: Opportunities per Deal by Channel - Last 12 Months



Ratios: Leads per Deal by Channel - Last 12 Months



Full-Funnel Analytics Helps to Answer ROI & Scalability Questions



Example: Change Channels



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What **data** do we need and how should it be presented to produce those insights?

- Lead-to-deal full-funnel analytics
 - Volume
 - Conversion Rates
 - Time
- Costs attributed to ToFu, MoFu, and BoFu
- Historical NRR by channel



How do we need to configure the **tech** or change **processes** to produce that data?

- CRM objects, fields, page layouts, automations
- CRM integrations with other GTM Tech
- Ingestion of finance data
- Process enablement and training



Case Study

\$40M+ SaaS

(Customer Success Platform for Mid-Market
B2B)

Challenge

- Significant win rate decline.
- Leadership thought it was related to macro conditions and poorly performing new sales cohorts.

GTM Insights

- Great GTM data (and analysis) exposed that they were over indexing top-of-funnel around SMB and SMB was outside of ICP.

Actions & Outcomes

- Company refocused ToFu investments on true ICP fits.
- Doubled win rate in less than a year.

Case Study

\$15M+ SaaS

(Local Marketing Platform for SMB)

Challenge

- Company saw positive correlation between spend on Facebook advertising and associated leads.
- Pulled SDRs off of prospecting to service Facebook leads and doubled down on FB ad investments.
- Costs went up, revenue down.

GTM Insights

- Full-funnel analytics showed poor conversion rates on FB leads. FB ROI was substantially worse than outbound SDR prospecting.
- Resource drain on SDRs and AEs to service FB was pulling from other productive channels.

Actions & Outcomes

- Customer redirected efforts towards prospecting and away from FB.
- 6X bookings growth in 4 months.

For a Free Template for Operationalizing Your GTM Data...Get in Touch



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