



The GTM Swiss Army Knife

Why marketing Ops will never be cookie-cutter and how AI can boost production

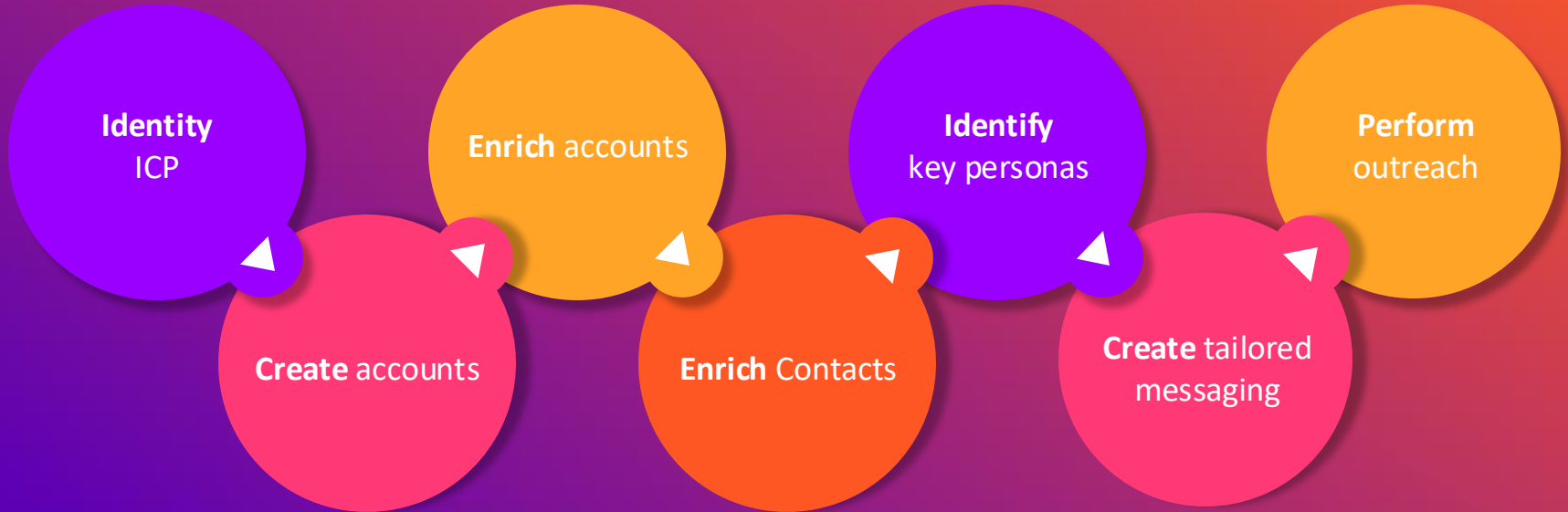
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The traditional outreach process





Challenge:

Costly, manual, and limited



Our task:

A fully automated AI-driven
outreach process

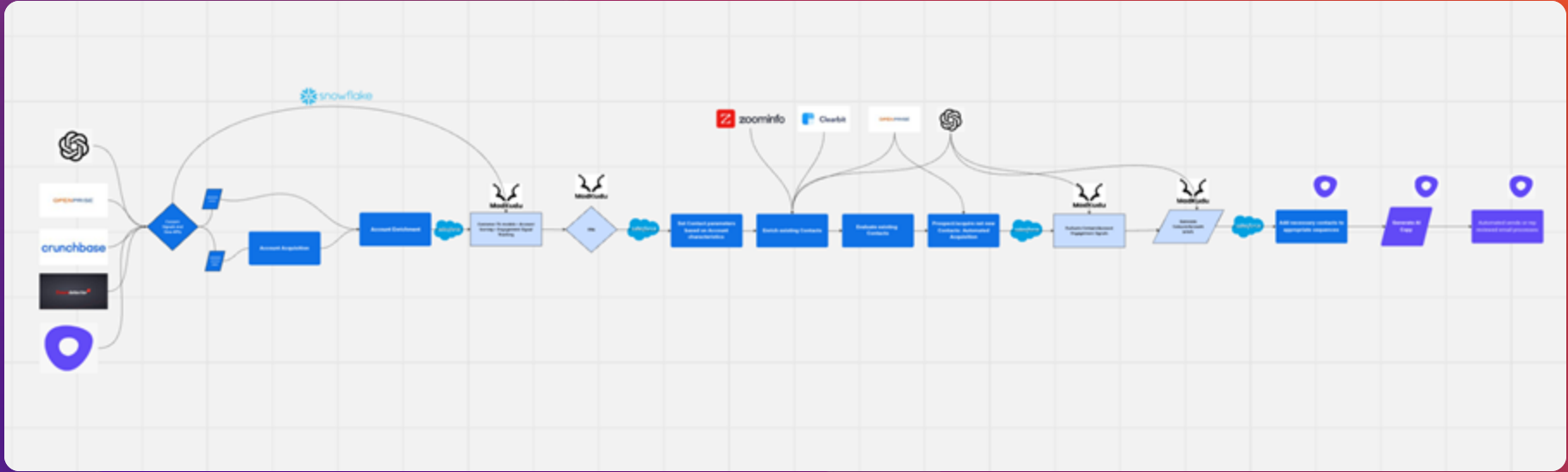


But how do we
get from manual to
fully AI / automated?

Creating a GTM swiss army knife for AI



My vision



STEP 1

Diagnose before you prescribe



1 Holistic evaluation of your

- People
- Process
- Tech/platforms
- And don't forget DATA!

2 Identify the gaps

3 Technical evaluation to decide on keep/cut/fix

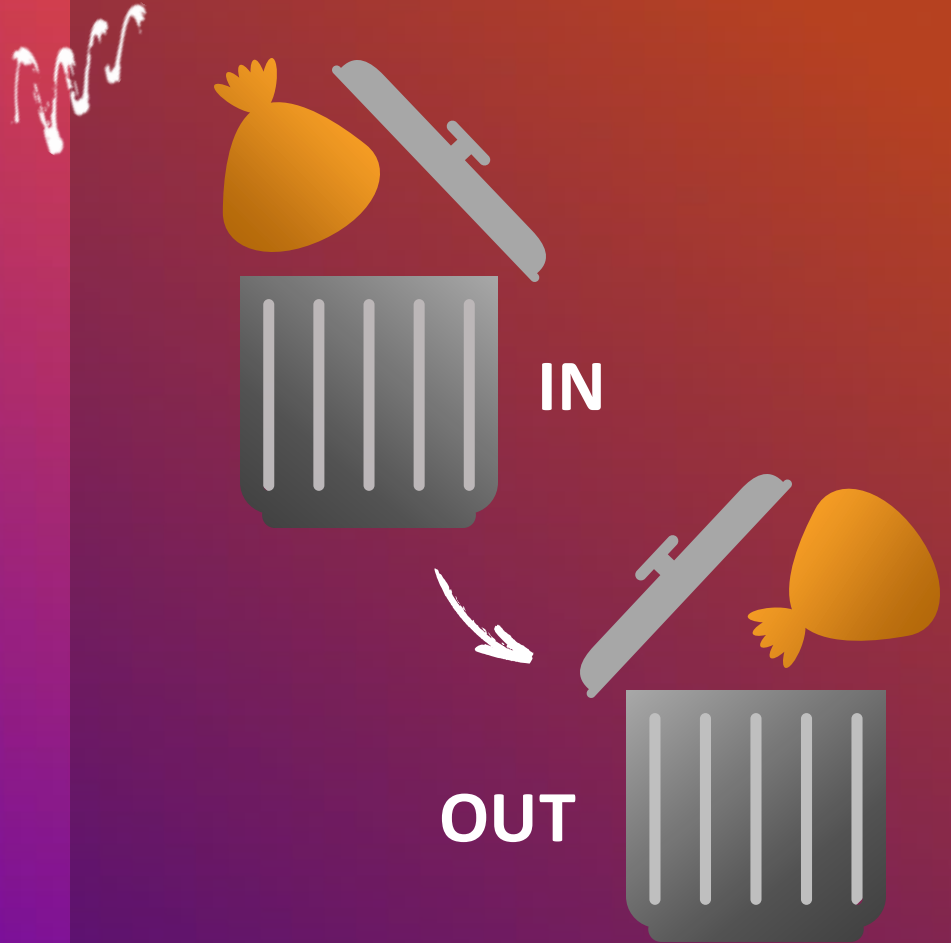


STEP 2

Minimal viable ops – Data hygiene

Pay attention to your data structures

- What is your field bible for this organization and why? (Fields, taxonomy, governance)
- Garbage in? Garbage out.
- Data cleanliness is an ongoing process



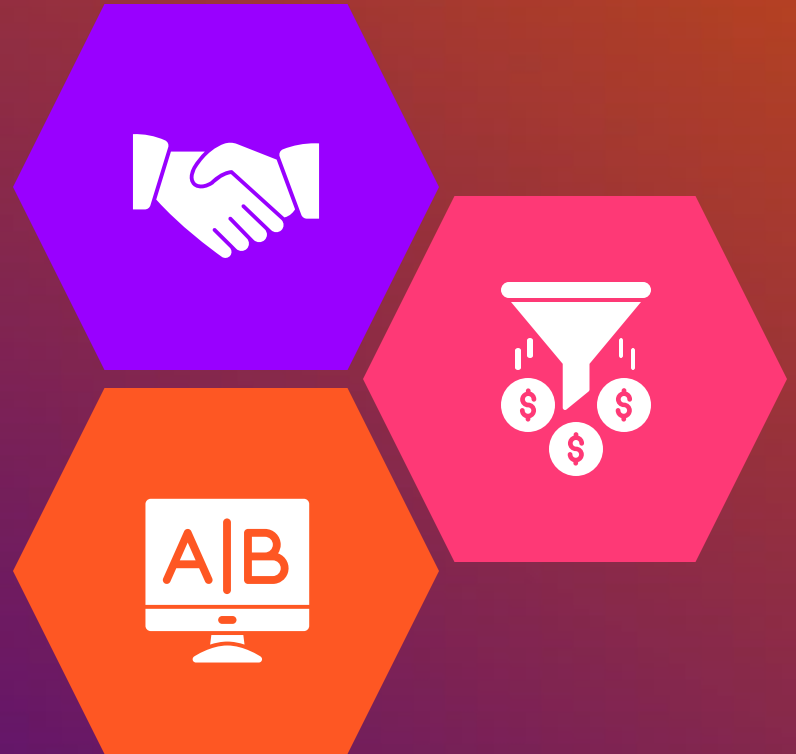
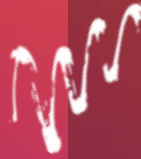
STEP 2

Minimal viable ops – Visibility down funnel

Collaborate with RevOps to
get the history

Visibility to your ROI down funnel

- Assumption – AI will be more effective and efficient than manual processes/judgement
- How to test that – Need the ability to track SLAs and performance
- Ensure reporting infrastructure is in place



STEP 3

Adapt to your GTM Motion

Alignment on GTM strategy –

Tie ops projects to exec priorities

Define how your funnel works –

Lead stages and funnel management

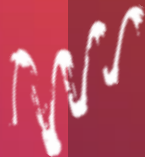
Team and people alignment –

Define handoffs and ownership

Reporting - Attribution that leadership trusts

Automation of gaining external account signals

- Ex: Outages, hiring for specific roles



CRO

CMO

CFO



Ops

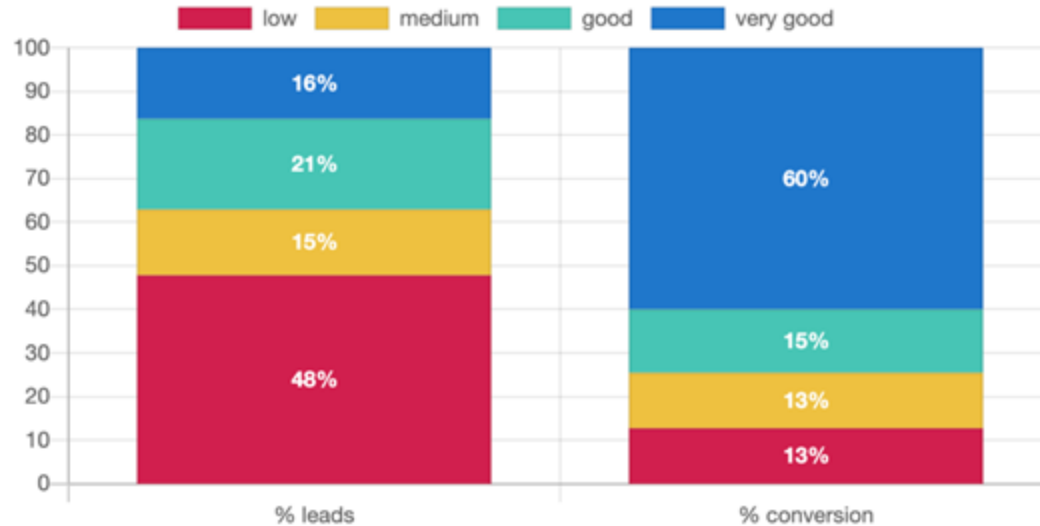
Adapting to your GTM motion

Signal	N With	N Without	Stage 0 CVR with	Stage 0 CVR without	Stage 0 Lift	Stage 1 CVR with	Stage 1 CVR without	Stage 1 Lift
Conference Attendance	284	799	5.99%	7.63%	-21.59%	7.04%	7.38%	-4.63%
Cloud Activity	205	878	12.20%	6.04%	102.03%	9.27%	6.83%	35.63%
Guide Download	157	926	2.55%	7.99%	-68.12%	3.18%	7.99%	-60.15%
Field Marketing	79	1004	3.80%	7.47%	-49.16%	3.80%	7.57%	-49.83%
High Intent Page Views	27	1056	7.41%	7.20%	2.92%	7.41%	7.29%	1.59%
Sponsor Network	33	1050	18.18%	6.86%	165.15%	21.21%	6.86%	209.35%
Webinar registration or attendance	150	933	8.67%	6.97%	24.40%	10.00%	6.86%	45.78%
Website Visits (20+)	100	983	11.00%	6.82%	61.39%	11.00%	6.92%	59.01%
Website Visits (10+)	103	980	4.85%	7.45%	-34.83%	4.85%	7.55%	-35.71%
Conference Engagement	49	1034	20.41%	6.58%	210.32%	26.53%	6.38%	315.64%
Contact Us Form	473	610	9.09%	5.74%	58.44%	9.30%	5.74%	62.13%
Conference Meeting Request	373	710	9.12%	6.20%	47.09%	9.12%	6.34%	43.82%

Adapting to your GTM motion

Account and Conversion distribution by Segment

How many leads are identified as qualified? Do they represent the majority of your conversions?





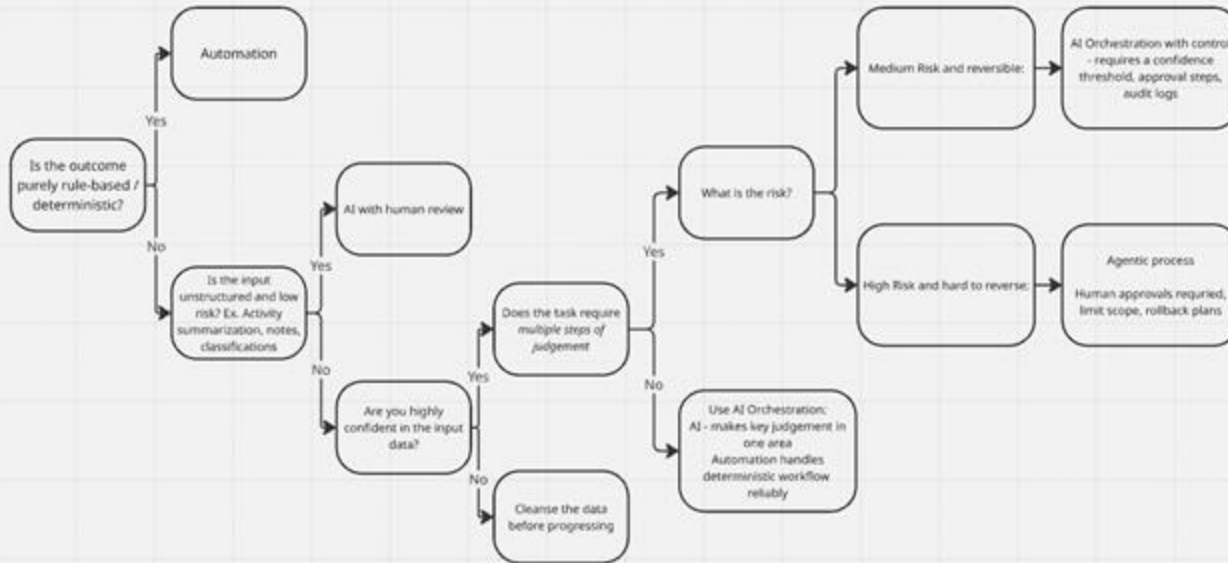
Now you're finally have the
right foundation to **scale AI**
within your organization



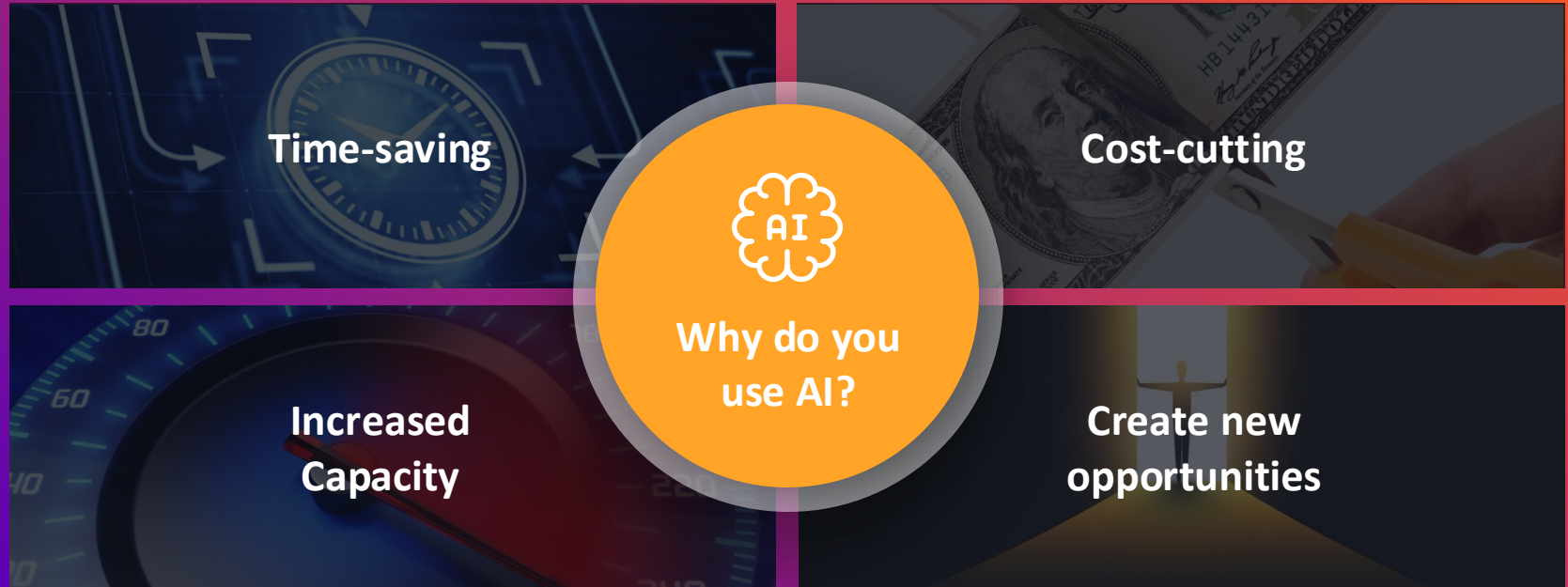
But first, the age old question:

To ~~be~~, or not to ~~be~~
AI AI

Decision tree – AI **Should Not** replace automation



Get alignment & manage expectations



And don't forget:
It's always good to **under-promise, over-deliver** 😊

The three levels of scaling AI



APPROACH 1

Achieve some quick wins



Examples of some quick wins



Activity summarization – structured “next step / pain theme”



Enhanced enrichment: Mining data that aren't readily available by 3rd-party data providers (ex: industry, sub-vertical, tech tags)

APPROACH 2

AI orchestration via a platform



Platform to stitch together the steps where you might require human intervention

Taking care of:

- ✓ Providing context between steps
- ✓ Prompt management
- ✓ Picking/routing between models
- ✓ Hallucination management
- ✓ Integration to existing tech
- ✓ KPIs and ROI measurement

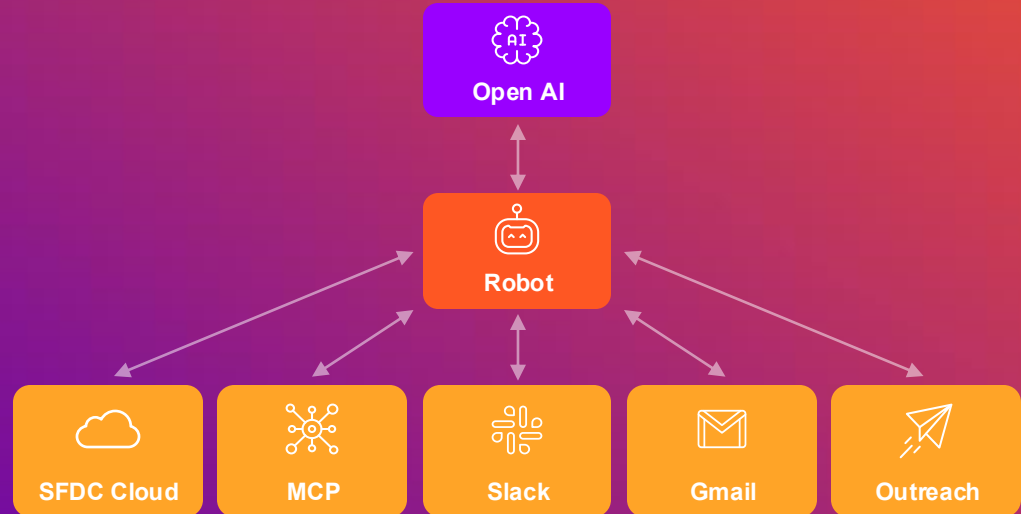
APPROACH 3

Fully agentic workflow

Triggers - actions - approvals – logs

Gates: when to require human review

Scope: start small, expand by segment



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Thank you