

Buyer Journey Data Model Sample Questions

1. Trace the average lead through your sales cycle from inquiry to renewal (with as much detail as possible. Feel free to include real-life examples if they currently exist in your CRM)
2. Break down your discovery -> signed contract process with as much detail as possible (with as much detail as possible. Feel free to include real-life examples if they currently exist in your CRM)
3. Name and define all of your Lead Sources. Which sources do you consider the most important today? What sources do you think are rising in importance and why?
4. Name and define all of your Lead / Contact Statuses. Include the exit criteria for each status and the expected actions from internal and external stakeholders
5. What is your ICP, Buyer Persona, and Qualification criteria? Do these change across different stages?
6. Name and define all of your Opportunity: Deal Stages. Include the exit criteria for each stage and the expected actions from internal and external stakeholders
7. What data do you wish to gather in each phase of your buyer journey? Where / when do you typically fail to capture that data?
8. What tools are currently in use across your buyer journey and at what points?
9. What tools are being under leveraged and why?
10. What content is being leveraged at each stage of the funnel? (White papers, landing pages, webinars, one sheeters, proposals, contracts, etc)
11. Define marketing's role today at each stage of your funnel. How would you like that role to evolve?
12. Who is responsible for upsells / renewals and why?
13. What automations are currently active in your CRM? How would you like to add to them?
14. What reports and dashboards do you (Leadership) consult most often? How can they improve?
15. What metrics are you not tracking today that you want new reports and dashboards to visualize?
16. What fields / properties do you feel need to be removed? Why?
17. What fields / properties do you feel the need to add? Why?
18. Please share all internal documentation and content that you have on this buyer journey from every function's perspective (marketing, sales, success)