WHITE PAPER

Context-Aware GTM

How verified data and business context power the next generation of revenue AI.

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Software vendors have been struggling to grow revenue for nearly a half-decade, with new business particularly difficult to come by due to intensified market saturation, increasingly complex B2B buying behaviors, and persistent macroeconomic instability. Modern sales environments require vendors to overcome entrenched incumbents, high customer switching costs, and internal operational friction that "silently breaks" new customer acquisition.

Furthermore, old plays no longer work as buyers quietly conduct their searches and identify solution candidates before reaching out to any of them. Thus, it becomes increasingly important for GTM teams to detect demand signals, prioritize activity, and refine their messaging. They also need to focus on in-demand accounts that align with their Ideal Customer Profile (ICP) definitions, identify at-risk deals, and improve their outreach to the buying committee.

To make matters worse, email is saturated with bland GenAI messaging that drives down click-through rates and continues to devalue the channel through weak "personalization," making it more difficult to garner prospect attention.

> **Case Study 1: Automated Account Research via Sales Copilot** — To improve its account research, Cloud Network Security vendor Aviatrix deployed HG Sales Copilot, surfacing real-time technographic, intent, and spend signals directly inside Salesforce. Sales Reps could instantly identify accounts running competitor infrastructure, score them by propensity, and act — all within their existing workflows.
>
> Sales Copilot is an AI-powered account intelligence agent delivered natively inside Salesforce and via a Chrome extension. It automates pre-call research, surfaces buying signals, identifies the right contacts, and delivers actionable playbooks — directly in the tools reps already use. HG Sales Copilot eliminates the "toggle tax"; instead of jumping between Salesforce, LinkedIn, intent dashboards, and data exports, reps receive a consolidated, signal-driven account brief on demand.
>
> HG Sales Copilot supports pre-call prep for Account Executives, outbound call prioritization for SDRs, expansion and renewal signals for Customer Success Managers, and pipeline review recommendations for Sales Managers.

Many of these problems stem from poor or unusable data that has accumulated over the years and continues to decay. CRMs are rife with outdated contacts and significant gaps in company and contact data. While vendors now license intent data, marketers are still figuring out how to identify "in-market" accounts that conform with their ICP. To make matters worse, sales reps are simply ignoring intent signals due to data overwhelm.

And now we are looking to feed this poor or unusable data into AI platforms, making the situation even worse. If we are to fuel effective GTM, we need to address problems concerning bad data and deploy context-aware AI.

GIGO

The term *Garbage In, Garbage Out* (GIGO) has been around for seven decades and is more relevant today than in the days of punch cards. With interconnected platforms, bad and outdated data propagate across many platforms, making remediation more expensive. What's worse, bad data is now being fed into AI platforms and used for business recommendations. But if your model is working with incorrect data, its recommendations will be useless and quickly discredit your AI programs. Thus, sales and marketing will quickly come to distrust Next Best Action recommendations if they prioritize the wrong accounts. The same holds true for AI messaging that falls flat.

For a long time, marketing handed MQLs (Marketing Qualified Leads) to sales reps, who ignored them because they were deemed of poor quality. RevOps shouldn't replicate this scenario but will if AI-recommended leads waste sales reps' time due to an unremediated underlying data layer.

One area where DaaS processes are particularly valuable is inbound lead management, which has historically been a mess. In 2011, Harvard Business Review published "The Short Life of Inbound Sales Leads", which noted that only 53% of sales reps responded to inbound leads within 24 hours, and 23% of leads went unanswered. While there has been some improvement in these numbers due to automated workflows, chatbots, and a better understanding of inbound lead management, the problem remains, particularly for vendors that lack AI SDRs or website chatbots.

Real-time visitor enrichment assists with lead scoring, messaging, decisioning (nurture or route to sales), and routing. DaaS enrichment also improves web form performance and enables form shortening, which reduces abandonment rates, enhances firmographics, and reduces channel conflict caused by misrouted leads.

Firmographics are improved through both real-time email verification and subsequent mapping of additional firmographics, technographics, and biographics to the lead record. Standardized data ensures that industry mappings are accurate, that subsidiaries are attached to their parents, and that sizing data is accurate.

> **Case Study 2: Improving Lead Forms** — AI GTM Platform Outreach struggled with form abandonment rates and partnered with HG Insights to perform form shortening and enrichment. Outreach added a JavaScript to Outreach's Segment account, which shortened Marketo forms to a single field (email) and performed real-time data enrichment, including calculated fields such as the estimated number of sales reps.
>
> When a lead was a strong fit, the forms included an opt-in demo checkbox. Outreach conversion rates jumped 45%. Read Case Study →

Furthermore, AI SDRs still require accurate company and contact information for personalizing discussions. As they gather emails, real-time queries to reference databases return firmographics and biographics that help customize the website and personalize the messaging. A CRM query would then determine whether the company is an existing account, a current prospect, or a new prospect, thereby further informing the AI SDR.

These enriched details greatly add to the context of the conversation, including positioning, content recommendations, and whether to offer a live conversation with a rep, schedule a meeting, or simply answer the questions.

Bad data will only build bad models that make bad recommendations. In the 1990s, Business Re-engineering guru Michael Hammer talked about "paving the cow paths" as an issue with automating outdated or inefficient business processes. If a process is poorly designed, speeding it up only exacerbates the problems.

The same is true of bad data fed into AI, which results in poor recommendations and inaccurate "insights." Operations teams need to build a context layer accessible to agents throughout the customer lifecycle. The current AI delivery model is headless SaaS, with business context shared with agents and LLMs via the Model Context Protocol (MCP), Command-Line Interfaces (CLIs), or older-school APIs. That is how data and insights power context-aware GTM.

Business Context

AI requires more than open web intelligence. It needs an accurate, comprehensive Business Context covering companies, people, branding, products, deals, account history, intent, engagement, journey stage, etc. Business context helps AI build audiences, prioritize activity, and personalize messaging. It helps ensure messaging is brand and product-specific, while adding deal and discussion context to later-stage discussions.

Without business context, such as account history and previous conversations, AI will repeat the same messaging to employees and clients. Likewise, customers will refuse to interact with AI customer agents if they believe the AI is faulty or doesn't understand them.

Simply feeding more data into GTM agents does not improve results if the data lacks relevance, accuracy, timeliness, completeness, previous activity and discussions, or standardization. At its core, context-aware GTM should help revenue teams answer a trio of questions:

> *“Why this account, why now, and what do I do about it?”*

Revenue AI should be delivering these answers in context and without friction.

In their State of Martech 2026 report, Scott Brinker and Frans Riemersma said that MarTech transformation requires context: "It's what will give marketing's AI transformation its shape, its strength, and its ability to fly." They identified three overlapping categories of context, with their union forming the necessary "golden context" that will drive enterprise AI:

1. **Company Context** captures corporate goals, strategies, brand, processes, capabilities, governance, and priorities. It is everything GTM professionals “know — or should know — about who they are, what they’re trying to accomplish, and how they operate.”

   “Should know” is part of the value AI brings to sales and marketing processes and includes best practices, the latest positioning, technical capabilities, competitive positioning, compliance rules, and the latest product enhancements.

2. **Customer Context** is what is known about customers and prospects, including their situation, goals, intent, preferences, history, jobs-to-be done, and moments-that-matter. “This is everything you would want to know about why a specific person is engaging with you right now — and what would help and delight them.”

   Customer Context is gathered from first- (CRM, Conversations, Emails, Engagement, Service Tickets, etc.) and third-party datasets (Firmographics, Contacts, Technographics, Intent, Business Signals). It is collected dynamically and updated with each interaction, business announcement, and executive change.

3. **Systems Context** is the technical reality of which information sets are accessible. It encompasses “what the company’s systems can actually access, connect, and deliver.” Unfortunately, not all customer and company contexts are accessible to AI. “Systems context is what determines whether either of those reaches the right AI agent, the right touchpoint, or the right decision at the moment it matters.”

Brinker and Riemersma call the union of the three contexts the "golden context," but view it as a step beyond the traditional "golden record," as it is dynamic and "evolves as customer needs do."

Powering Account Research

One area of friction is the "toggle tax" between applications and the difficulty of conducting account research. Sales reps have historically underinvested in account research because it can take hours of focused investigation to assemble an understanding of a company and its buyers. Sales reps must navigate Salesforce, LinkedIn, company websites, social media, regulatory filings, and more to assemble account profiles and account plans.

> **Case Study 3: Account Planning** — Security Platform Snyk's SDRs manually searched for business events and intent signals that indicate buying urgency (e.g., engineering hiring surges, recent security incidents, leadership appointments, funding rounds, and spikes in web activity on security content), but the process was time-consuming and lacked a "coherent narrative" for outreach. Working with HG Insights, Snyk deployed HG Account Briefs to its workflows, reducing SDR pre-research time by 95% while improving messaging with consolidated firmographic, technographic, intent, and contact intelligence.
>
> Reps were also armed with a prioritized list of in-market accounts and were quickly able to craft "why you, why now" messaging, which they activated through Salesloft. Read Case Study →

Except for named account reps, most sales reps strictly limit the time they spend building such profiles because it requires collecting and synthesizing data to determine what is relevant about the company and the buying committee for each deal. Furthermore, as the sales profession tends to attract extroverts, sales reps would rather spend time interacting with customers and prospects than conducting research.

Complicating matters — account research is hampered by a significant signal-to-noise problem:

- Which signals (intent data, engagement data, business events) identify the account as in-demand?
- Is the company within my ICP?
- How should I prioritize researching this company vs. others?
- Who are the likely buyers?
- Which key roles are missing from my buying committee?
- What signals provide messaging hooks?
- Is this a healthy deal?
- What are the open action items and who owns them?
- What are the explicit and implicit concerns of the buying committee members?

Fortunately, account research, activity prioritization, sales methodologies, and buying committee definition are all perfect use cases for agentic GTM, which can ingest large datasets of structured and unstructured data to identify in-market opportunities and recommend next-best actions based on company fit, journey stage, engagement (overall and with key roles), conversations, business events, social media posts, company websites, SEC filings, and LinkedIn profiles.

For GTM agents to be effective, they require a solid data foundation of first- and third-party data, coupled with AI-powered activation and an agent builder for agent customization.

Furthermore, business context cannot simply be built from open web content. It requires the specificity of your brand, products, deal discussions, and customer interactions. That is, the details that make your company and customer interactions unique. It is simply not possible to differentiate yourself from your competitors if your GTM is based primarily on publicly available information. Context-aware GTM is required.

Reference data, whether fed directly to an AI or indirectly through API-enrichment processes into CRMs and MAPs, provides a solid data foundation that reduces hallucinations and expands the business context available to AI.

While company sizing data is often available online and ingested by LLMs, it is often out of date and lacks key details such as whether the entity is a parent or subsidiary.

Firmographics also offer data standardization. AI maps companies to industries, but does not comply with standard taxonomies, making audience building and segmentation more difficult.

Reference data also provides supplementary datasets such as intent and technographics. Technographics helps technology and IT service providers build partner-focused campaigns, engineer competitive takeout campaigns, and identify companies that rely on outdated tech or have upcoming contract renewals.

Data vendors cite wildly different contact decay rates, with **25% per year** at the low end and going as high as **75% per annum**. At a conservative 3% monthly decay rate: after one year, 30% of your contacts are bad. At 22½ months, your CRM and MAP have coin-toss-level quality, and only 1 in 3 records is accurate at 3 years.

Furthermore, standardized and verified contact data facilitates building out the buying committee, including titles, roles, emails, and mobile numbers. Improved contact data reduces email bounces, helping marketing avoid reputational risk. It also prevents wasted sales effort reaching out to bad email addresses or departed executives, and helps ensure legal compliance, an issue for companies operating in Europe (e.g., GDPR), California (e.g., CPRA), and other jurisdictions with data privacy regulations.

Company data (firmographics) is more stable, whereas company event data (e.g., intent, technographics, business signals) change rapidly and offer a first-mover advantage to firms that can act on dynamic information.

The most ephemeral data set is intent data. Intent vendors such as HG Insights and Bombora update their intent scores weekly.

While Marketing Operations has been working to define its ICPs and target personas for the past decade, it has often relied on vague industry and sizing terms. Standardized reference data support more accurate and refined definitions of both the ICP and the functions and levels of buyers. This intelligence is used to define the ICP and target buyer personas. Verified reference data also assists in:

- Finding white-space accounts in the ICP that are not yet in the CRM (i.e., look-a-likes)
- Prioritizing leads
- Building audiences
- Performing market analyses (e.g., TAM, SAM, and SOM)
- Scoring and routing leads

Furthermore, reference data provides a single source of truth for the organization. Thus, all teams use the same data, reducing distrust during handoffs and channel conflict caused by incomplete or missing firmographics. It also ensures consistent messaging across the organization.

First, Second, and Third-Party Data

Business context requires both first- and third-party data that offer a broad set of benefits across the revenue team and improved AI interactions with accounts and prospects (see Table 1).

Table 1: First, Second, and third-party data combine to build context-Aware GTM for teams and AI agents.

TYPE	CATEGORY	SOURCE	VALUE
1	Brand	Marketing	Ensures all messaging, content, logos, and value propositions are consistent and up to date.
1	Products	Product Marketing	Ensures all products, features, value propositions, use cases, users, and messaging are accurate, consistent, and up to date.
1+3	ICP, TAM, SOM, SAM Analysis	Marketing Ops	ICP and other analyses begin with current accounts that are enriched and analyzed to size the market and identify the attributes of ideal customers. ICP analysis defines which customers are good prospects for outreach, which inbound leads should be prioritized, and which prospects are more likely to close.
3	Programmatic Advertising	Marketing	ICP and Target Persona analysis refines programmatic ad spend, reducing the cost per click and improving campaign ROI.

TYPE	CATEGORY	SOURCE	VALUE
3	Prospecting	Marketing, SDRs	ICP and Target Persona analysis also refines prospecting, ensuring that marketing audiences and SDR outreach campaigns target high-fit accounts and associated purchasing decision-makers.
1+3	CRM & MAP Enrichment	CRM or MAP	Refreshes firmographics and biographics while filling in data gaps. Standardizes matching fields, ensuring leads are properly linked to accounts and subsidiaries to parents. Identifies contacts no longer at an account, new titles, relocated businesses, new subsidiaries, etc. Additional fields include technographics (e.g., platforms, spend data, contract expiry dates), sizing data, social media links, signals, etc.
1+3	Visitors (Intent)	Website + DaaS Enrichment + CRM	Visitor Tracking identifies people and companies visiting your website and which pages and content were viewed. Data is enriched with firmographics, technographics, linkage (i.e., parent-subsidiary relationships), account status, account owner, job function, job level, title, previous visits, etc. Data is shared with AI SDRs and chatbots to personalize interactions, enabling leads to be scored and routed more accurately. Data is also synced with the CRM.
1+3	Web forms	Email + DaaS Enrichment	DaaS reduces form fields to one or two, limiting form abandonment rates. Enriched data is more reliable than form fills as it is standardized, tied to parents, and not subject to bogus or incorrect answers. Enriched data can be scored and routed immediately, while informing follow-on messaging (e.g., additional content recommendations and sales callbacks).
1+3	Events	XLS or CSV uploads for events	Event leads are immediately enriched and matched to accounts. Normalizing and standardizing the data improves upload accuracy and reduces dupes. Leads are scored, with high-value leads routed to the assigned rep and the remainder nurtured. Additional context helps reps with initial messaging and improves the likelihood they will act on the lead.
3	Intent Data	B2B Media Sites	Third-party intent collected from buyers while conducting research on B2B media websites. Bombora, which manages a co-op of B2B media sites and updates its coverage weekly, has over 20,000 topics that identify in-market companies with surging intent. Account level only.

TYPE	CATEGORY	SOURCE	VALUE
2	Intent Data	Review Sites (e.g., G2, TrustRadius, PeerSpot)	Intent data identifies active buyer research by technology category, including research into you and your competitors. When your customers are researching your competitors, it should be viewed as a giant churn risk flag, but with time to save the account. Likewise, if they are researching a product category that you also support but they haven't licensed, it should be viewed as a cross-sell opportunity. When ICP accounts that are not your clients are researching your competitors, it signals that they are in-market but potentially still defining their shortlist, a perfect time for sales outreach.
3	Business Signals	News, Press Releases, SEC Filings, Social Media, Company Blogs, Job Sites, etc.	Business Signals are gathered from the web and delivered as either sales alerts or ingested into AI to assist with account and deal scoring, deal alerts, churn risk flags, cross-sell opportunity signals, and messaging.
1	Engagement	Email, Meetings, Downloads, Page Views, Digital Sales Rooms	Engagement data is a source of deal health and identifies the level and scope of interactions with a buyer. When fed into AI with conversational AI, it will identify at-risk deals, deal progression by stage, buying committee gaps, etc.
1	Conversational AI	Email, Meetings, Chatbots	Identifies who is engaged, their concerns, action items, and sentiment. Provides a transcript and summary to sales reps and buyers and helps identify at-risk accounts. In the aggregate, it provides a "voice of the customer" source to sales management, product marketing, and product management.
1	CSM	Training Sessions, Support Tickets, Usage, QBRs	An underdeveloped source of engagement intelligence, but critical for upgrades and churn reduction.
1 + 3	Deal Scoring / Deal Health	CRM + MAP, Engagement Data, Conversational AI, Signals, Intent	Identifies deals that are progressing properly, stalled, missing key buyer personas, or at risk of churning. Assists with activity prioritization, forecasting, coaching discussions, and activity planning.

Intent, business signals, conversational AI, and engagement provide a holistic view of deal and account health across the customer lifecycle, with different intelligence sources driving activity at different stages. For prospecting and initial outreach, intent data identifies who is in-market at your ICP, but once sales reps have struck up a conversation with a prospect, engagement data and conversational insights become more valuable for driving the deal forward. Engagement data tells reps (and AI) whether deals are single-threaded or multi-threaded, whether account interest is growing or waning, and whether sales reps are speaking to the full set of decision-makers and influencers or missing key roles.

When fed to agents, engagement and conversational data help determine whether deals are advancing to later stages of the buyer's journey and recommend re-engagement activities to stalled deals.

Once a deal closes, engagement data shifts from sales teams to Customer Success. Feeding operational data into account health scores is in its early stages, but low training attendance, product usage levels and trends, and customer service tickets will provide insights into whether an account is likely to upgrade, renew at current levels, or churn. These data sets should be viewed as next in line for inclusion in account health scoring and alerting.

Business Signals should also be factored into account health scores and provide value across the entire customer lifecycle. Account teams should know when a key member of the buying committee departs or when C-level changes could stall deals.

Other high-value signals include:

- Corporate Expansions (e.g., new locations or expanded facilities)
- Corporate Contractions (e.g., layoffs or weak financials)
- Funding Rounds
- M&A
- Platform Deployments
- Technology Investment Plans

Some signals are initially ambiguous and could be either positive or negative, necessitating additional account planning, outreach, and monitoring. If a customer is acquired, it could result in future churn or drive a significant expansion opportunity into the parent. If both accounts are current customers, the contracts are likely to be merged in the future, which could result in volume discounts driving revenue downgrades unless the Account Manager proactively looks for upselling or cross-selling opportunities. Of course, there may also be short-term integration projects. Thus, M&A, particularly at top accounts, should be carefully evaluated and monitored.

Likewise, losing a champion creates churn risk at their previous company but provides a valuable opportunity at a new account.

In each case, business signals help drive activity that improves deal closure, fosters upsell or cross-sell opportunities, and mitigates churn risk.

The Evolution of GTM

Traditionally, brand building, event marketing, and outbound marketing drove leads into the pipeline. Firms operated with segregated marketing, sales, and customer success teams, and the atomic unit of sales was leads (people), with MAPs spamming wildly. If you visited a trade show booth, downloaded collateral, or somebody from your company visited the company website, you could be targeted.

But individual leads were not usually the decision makers, and the approach was scattershot. Marketers were trawling the ocean with large nets, and most of the leads were bycatch. It was highly inefficient and often led to a poor brand experience.

Fifteen years ago, firms began to wake up to account-based marketing and began homing in on their ICPs. The atomic unit shifted to accounts, and activity became much more focused, allowing sales reps to conduct limited account research (the exception has always been named account reps who manage only a few accounts). Sales Engagement Platforms supported structured campaigns within accounts, and sales outreach (vs. marketing) enabled greater personalization across the buying journey.

In 2017, Sirius Decisions stated the obvious with their Demand Unit Waterfall — buying committees are the true atomic unit for GTM. But targeting buying committees is much more difficult than targeting accounts, as they are ephemeral and vary across buying journeys, even within the same account. Reps, however, began multi-threading their accounts, and digital sales rooms offered a portal for sharing key documents between buyers and sellers.

The demand unit (Sirius Decision's term for buying committees) advice remained mostly theoretical until the pandemic. Suddenly, sales became heavily digitized with conversational AI capturing meetings and ingesting emails.

Intent data also came into vogue a decade ago, but was used mostly in the marketing department, as intent provided more noise than signal for sales reps.

The truth is that a single intent signal is rarely an actionable indicator of buyer intent. Its true value comes when disparate intent and engagement signals are aggregated and fed into AI to determine which signals are relevant and which accounts are in-market and not conducting background research.

AI is very good at analyzing disparate signals of different types and determining which are fool's gold and which are valuable, helping to score leads, analyze deal health, and offer recommendations.

The evolution from leads (MAPs) to accounts (ABM Platforms) to buying committees (AI SDRs, GTM AI) occurred because the underlying data, connectivity, organizational structures, and technology enabled improvements in qualification, targeting, messaging, activity prioritization, and communication.

The latest innovation is Agentic Sales and Marketing, which requires a dynamically maintained business context for both human/agent collaboration and agent-to-agent (A2A) integrations. While APIs remain important, the next stage of agentic collaboration is being powered by MCP, a standard released by Anthropic in November 2024, and CLIs, which are quickly emerging as agentic interfaces for delivering business context to agents.

While humans are more likely to spot inaccuracies, A2A workflows, decisioning, and recommendations will only be effective if business context, including governance rules and permissions, is built into agentic collaboration.

Conclusion

Enriching enterprise software applications with verified reference data addresses one of the core issues facing GTM teams: the poor quality of data they rely on to make business decisions. Whether it is qualifying and routing leads, prioritizing sales activity, flagging at-risk accounts, or building audiences, GTM teams that enrich their applications with reference data make better decisions, close more deals, and message more effectively. Enrichment addresses problems during data entry (typos, incorrect values, missing fields) and due to data decay, ensuring a solid data foundation for decisioning.

High-quality data becomes even more critical with the advent of agentic sales and marketing that prioritize accounts, recommend next-best actions, display rich account profiles, flag at-risk accounts, and generate effective, branded messaging. Agents that lack grounding in business context, whether from first- or third-party datasets, will disappoint. Agents infused with business context will deliver context-aware GTM.

AI holds out great promise for GTM teams, but it can only provide solid recommendations and high-value workflows when it models with accurate data and rich business context across the customer lifecycle. Failing to deploy proper business context will cede the market to your competitors. It is past time for AI experimentation and point solutions focused on specific use cases. Now is the time to build context-aware GTM across the revenue team that encompasses all of your customer touchpoints.

About the Author

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About HG Insights

HG Insights delivers AI-powered Revenue Growth Intelligence (RGI) solutions that modernize GTM strategy and activation, enabling B2B companies to prioritize, target, engage, and convert the best opportunities faster. HG Insights platform's analytics and agents turn deep market, account, technology, spend, intent, and customer data into actionable insights and automated workflows that accelerate pipeline and enhance predictability. That's why 95% of Fortune 1000 B2B tech companies and all major hyperscalers rely on HG Insights to grow revenue, boost efficiency, and improve retention. For more information, visit www.hginsights.com.

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