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**MParDreamin' 2022**

# Understand and Protect Your System of Record

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CEO and Founder, Stack Moxie



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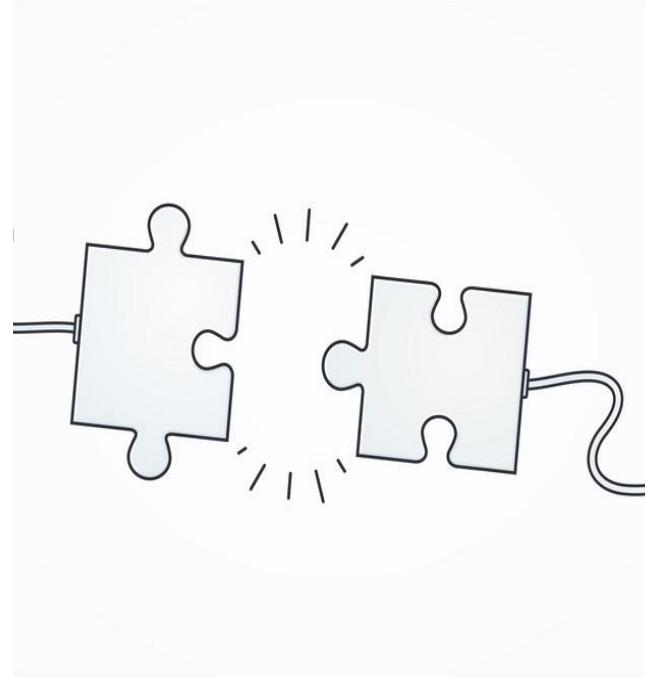


**Which system has the final say in tracking your KPIs?**

# Your system of record



- When your organization decides on its KPIs, does each team understand (and agree) on how those metrics will be tracked?
- What happens when at the end of the quarter, teams are debating over whether or not a goal was reached?



# The pitfalls of a misaligned system of record



- When teams don't know which system is the source of truth for a given metric, disagreements arise
- Unless records for each metric are identical across systems (spoiler alert: they never are), there needs to be one defined system responsible for measuring each of your KPIs
- If your teams are disagreeing on whether a metric was reached, your system of record is misaligned





**How do you get everyone  
on the same system of  
record?**

# Getting started with alignment



## What do you need to begin defining your system of record?

- Published tech stack diagram
- An understanding of the current data you own and how it's managed
  - Sales funnel data
  - Deals data
  - Lead data
- An understanding of how other teams view their system of record (Sales, Engineering, etc.)





# Defining your system of record

**Let your tech stack diagram inform your system of record.**

- Which system owns which metric?

**Your tech stack diagram informs which system is the system of record for each of five key metrics, including:**

- Core metrics
- Conversion and scalability metrics
- Product-led growth metrics





# Sample agenda: Agreement



## × System of Record: Cross Team Sync

Nov 2, 2022 7:00pm to 7:50pm Nov 2, 2022 Time zone

☐ All day Does not repeat ▾

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M.H. Lines ▾ ● ▾



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📎 B I U ☰ ☷ ⌨ ✎

📅 Create meeting notes

The purpose of this meeting is to align on teams on the source of truth for sales, marketing and product numbers.

1. Review a map of all systems - how do things flow?
2. How is data pushed? How is it accepted?
3. Create a data map (red, yellow, green, black)
4. Schedule cadence to review



# What are system of record best practices?

# Manage your system



**If people are depending on a system you own as their system of record, you must practice transparency.**

- Publish SLAs related to that system for everyone to see
  - Integration speed
  - Reporting notifications
- Have a clear process for managing outages that may affect other teams' work



# Stack Moxie Strategic Quality Model

	Transparency	Communication	Error Maturity	Monitoring & Testing	Capacity Management
5	SLA Tracking & Published Postmortem	Established Release Process w/ Proactive Notifications	Ability to Roll Back	Predictive Analytics & ML Trends (Chaos Engineering)	Agile Predictability (When is it done?)
4	Postmortem Process	Live Site Incident Process	Integrated into Corporate-wide Bug Tracking System	Automated Monitoring	Increasing Team Capacity without Headcount
3	Published Status Combined with Demand Central	Communicated Priorities via OKRs & Goals	Ticketing SLA Tracking	Regression Checklist	Clear Communication Capacity & Prioritization to Stakeholders
2	Demand Central	Defined Distribution and Self Subscription	Ticketing System	Well-defined Checklist	Total Cost Analysis
1	Published SLAs List	Ad Hoc Distribution Groups (Email or Slack)	Bug Tracking List	Per Campaign Launch or Program Change	Cross-team Scoping
0	Diagram of Tech Stack Partner	No Organized Communication	No Communication or Ad Hoc Email	No Monitoring	No Plan



EVERYONE STARTS AT THE BOTTOM

QUALITY - moving from individual frame of responsibility to full visibility and ownership across multifunctions

# Plan your KPIs



**As your team is assigned or decides on KPIs, planning is critical for keeping your organization on track.**

- Define KPIs in a glossary the entire organization can access
  - Include a link to the live dashboard where your KPIs exist for everyone to track
- For each KPI, align on:
  - An explicit definition of the goal for team members to understand
  - An explicit definition of where this goal is tracked (what its system of record is)



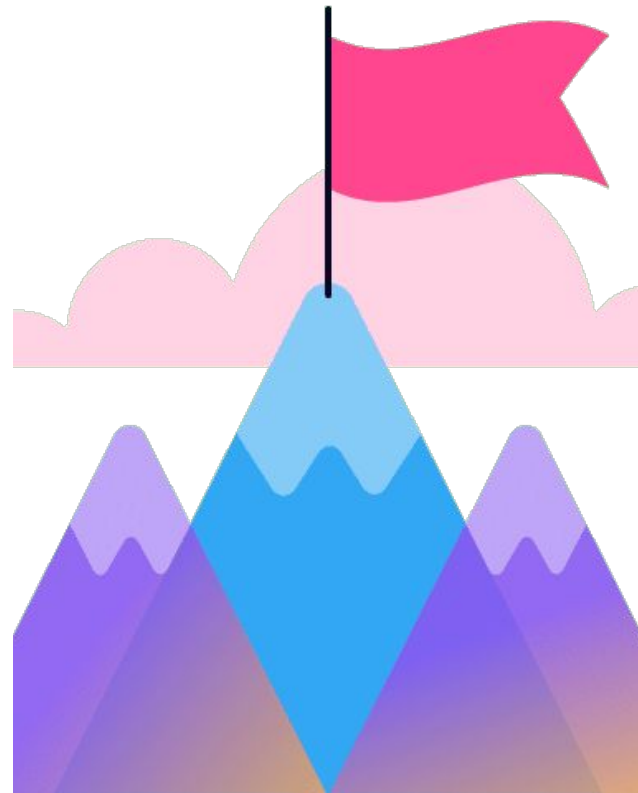
A	B	C	D	E
System	22 Goal	Gap	Current	Status
Lead Routing to Sales	> 10 minutes		8 min	
Sales Followup	>2 hours	2 hours	4 hours	Hiring additional project managers
MQL > SQL Conversion	50%	28%	22%	
MQL > SAL Conversion	95%	45%	50%	
Time to Convert from Known to SQL	120 days		?	

# Have the hard conversations



**When you take on new KPIs or introduce new processes that influence them, there will be challenges.**

- Implement a weekly cadence to discuss challenges and seek to understand their root causes
- Have these conversations regularly until they are irrelevant
  - Eventually you will achieve alignment and these conversations will no longer be necessary to have weekly
  - Graduate to discussing challenges as needed





# Two systems of record, one metric



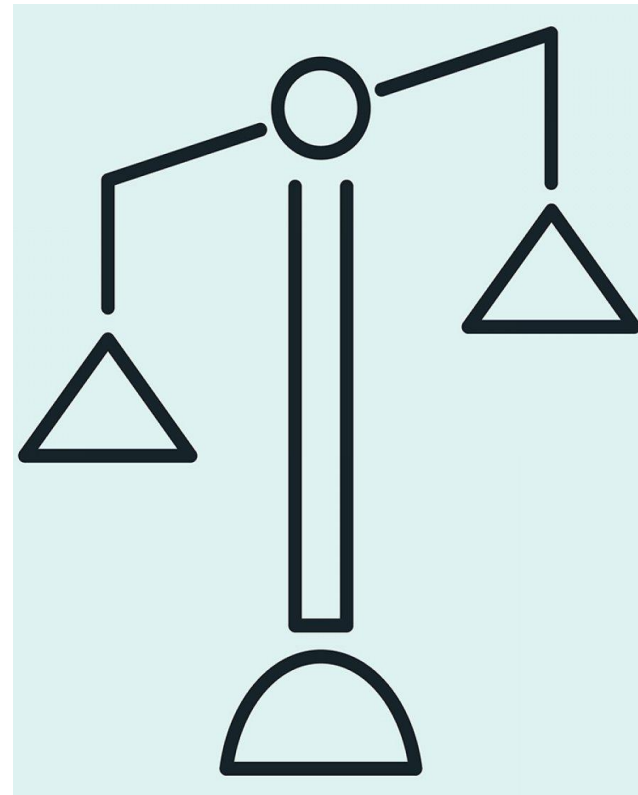
**MQL:** A lead your MAP has defined as qualified

**Sales-accepted lead:** A lead that was created in your CRM and assigned to a salesperson

- These numbers should be the same, but their respective systems of record may show differences.

**Why is this valuable?**

- Being able to compare one system with another to report on the same number means you can identify technology problems or lead routing issues
- It is good practice to glance at each of these numbers each week to understand alignment



# An example: The demand waterfall





**Protect your system of  
record (your digital life  
depends on it).**



# Thank you!

We appreciate your attendance at this session. If you have any questions please reach out to us via Goldcast or use the information below. We hope you enjoy the rest of the conference!

**M.H. Lines**  
[mhlines@stackmoxie.com](mailto:mhlines@stackmoxie.com)

# Welcome Speakers!



The MarDreamin' Team would like to thank you for your participation in this incredible event. It is because of you that we are able to provide a global community of Marketers with the best tips and tricks in the world of Salesforce and marketing automation.

Sharing our knowledge is one of the key goals for this event. We understand that by doing so we are growing the community which ultimately means growing the “pie” - and that means more opportunities for everyone. Whether you’re joining us from California, Spain or even Australia we welcome you to this event and hope you share our enthusiasm.

Again, thank you for your time and for sharing your gift with others.

**You're all incredible trailblazers!**

If you have any questions please don't hesitate to reach out to us.



# Branding



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# Branding



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