vonazon | SOFTWARE GTM

Software GTM Playbook

Connecting product interest, HubSpot, CRM and sales



Product interest only becomes pipeline when someone acts on it.

Software teams generate interest in many places: a trial sign-up, a demo request, a pricing-page visit, a feature used for the first time. This playbook shows how to capture those signals, qualify them, route them and keep the system in step as the product changes.

Who it's for: marketing, sales and RevOps leaders at SaaS and software companies using HubSpot, alone or alongside Salesforce.

How to use it: each section ends with a checklist. The last page is a short self-assessment.

Software buyers don't follow a straight line.

Three things make software go-to-market different from most B2B:

01

Many people, different roles. A technical evaluator, an end user and an economic buyer each need different content and a different next step.

02

Interest can show up in the product, not only on your website. Where there is a product-led motion, trials, free tiers and first-time feature use are all signals.

03

The product keeps changing. Releases, packaging and pricing change what you sell and who you sell it to.

Buyer role	What they want to know	What the system should do
Technical evaluator	Does it integrate, scale and meet our security needs?	Send technical documentation and flag for a solutions engineer.
End user	Will it fit how I work?	Send onboarding and in-product education.
Economic buyer	What is the business case, cost and risk?	Send business-case content and route to sales.

Know which motion you run.



A **free trial** is time-limited access.



Freemium is an ongoing free tier with limits.



A **demo** is a sales-led walkthrough.

Each produces different signals, so decide which you run before you design anything else. Your GTM system should reflect how the product is actually bought. A high-touch enterprise sale, a demo-led motion and a self-service product motion create different signals, handoffs and follow-up requirements.

The journey changes by stage and by role. A technical evaluator, end user and economic buyer may all be involved in the same deal, but they are looking for different proof before they can move forward.

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Make trials and demos count.

A request is a signal. It becomes actionable when you capture enough context to decide what happens next.



What to Capture

Motion and source: trial, freemium sign-up, demo request or contact sales.

Role and company: ask for what sales needs, and use progressive profiling for the rest.

Product interest: which product, plan or use case.

Product activity (for product-led motions): the key actions that show intent, such as inviting a teammate or connecting an integration. Define these for your own product.

Consent and email preferences.

In HubSpot: forms and form properties, lifecycle stage and lead status, contact-to-company association, and a route for product data to arrive (through an integration, the API or events).

Common Mistakes: automatically treating every trial sign-up as a marketing-qualified lead, asking for too much on the form, and leaving product data in a separate system nobody checks.

CHECKLIST

- ☐ We know whether each request is a trial, freemium sign-up or demo.
- ☐ Role, company and product interest are captured on every request.
- ☐ Where it applies, key product actions are defined and visible to marketing and sales.

Score for real buyers.

Ask two separate questions: **Is this a good fit?** and **Are they showing intent?** Scoring them separately keeps a great-fit prospect from being buried by a high-activity user who will never buy.



FIT
role, company, segment, size and tech stack.



INTENT
demo requests, pricing-page visits, product activity (where you have it) and email engagement.

	Lower Intent	Higher Intent
Higher fit	Nurture	Route to sales now
Lower fit	Deprioritize	Low-touch or self-serve path

For product-led motions: product-qualified leads. If users can try or use the product before talking to sales, a product-qualified lead (PQL) is a user whose product activity suggests buying intent. Agree on the specific actions with sales and product, and review them as the product changes.

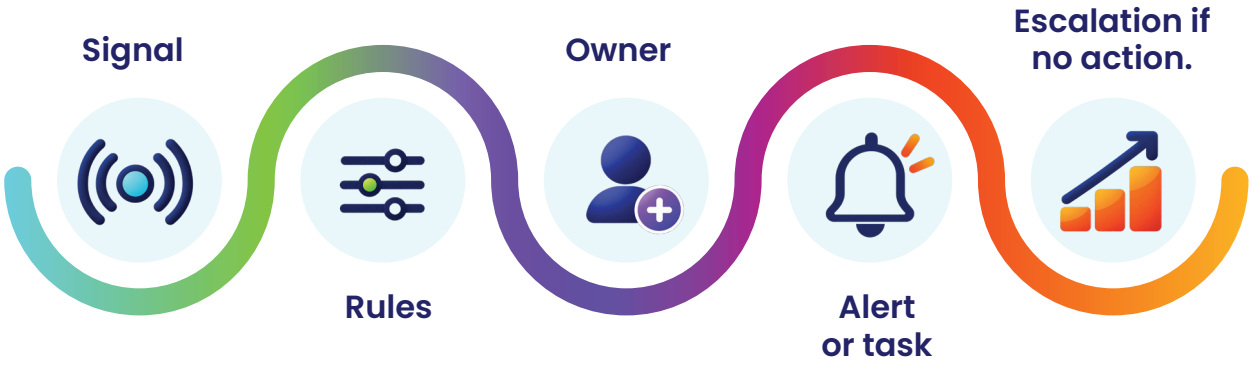
In HubSpot: lead scoring can model fit and engagement separately, and lifecycle stages record where each contact stands.

CHECKLIST

- ☐ Sales and marketing agree on what makes a lead qualified.
- ☐ Fit and intent are scored separately, and the thresholds are written down.
- ☐ The scoring model is reviewed whenever the product or packaging changes.

Know who owns the next step.

Routing answers three questions: who owns it, how fast, and what happens if nobody acts.



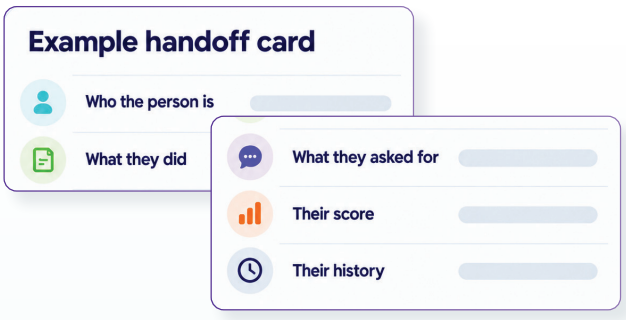
Routing rules usually depend on

Segment, **region** or **territory**.

Whether the account is **new or an existing customer**.

Product line or **plan**.

Request type: a demo request goes to a rep, while a trial may start with a nurture track or a development rep.



What sales should see at handoff: who the person is, what they did, what they asked for, their score and their history.

Set a response expectation and an escalation path, so a lead that nobody follows up on is reassigned rather than lost.

CHECKLIST

- ☐ Every qualified lead has one named owner.
- ☐ The handoff shows activity and context, not just a name and email.
- ☐ Response times and reassignment rules are defined and monitored.

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Keep the data clean as you scale, and connect the stack.



Governance

01 Decide who can create properties, and use standard values for key fields such as lifecycle stage and lead source.

02 Define how duplicates are found and merged.

03 Track consent and subscription preferences.

04 Decide which sign-ups become records you actively market to. If you have product sign-ups, they can add contacts quickly.

05 Protect sending reputation by suppressing bounces and long-unengaged contacts.

Integration

01 For Salesforce, decide which system owns which objects and fields, map fields deliberately, and set the sync direction and rules.

02 Decide when a lead becomes an opportunity and where deal data lives.

03 Define where product data comes from, how often it updates and which fields it fills.

04 Give every integration a named owner.

CHECKLIST

- ☐ Key properties have standard values and a documented owner.
- ☐ Duplicates are monitored and merged on a schedule.
- ☐ Field ownership between HubSpot and Salesforce is written down.
- ☐ Every integration has an owner and a test plan.

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Software GTM changes as the product changes.

Every release can change who you target, what you promise and what counts as buying intent. Build a short review into your release process so campaigns, scoring and routing change with the product, not after it.

BEFORE A LAUNCH

Confirm what ships, for whom, when, and whether the release is beta, limited, soft launch or generally available. Update positioning and messaging.

AT LAUNCH

Check scoring for new signals, routing for new products or plans, and nurture for new buyers.

AFTER A LAUNCH

Retire outdated content, review how scoring and routing performed, and send what you learned back to product.

If this changes...	Review...
A new feature	Scoring signals, nurture content and sales talk tracks.
New plans or pricing	Forms, qualification rules and routing.
A new product line	Ownership, routing and properties.
A feature is retired	Customer communications and suppression lists.

CHECKLIST

- ☐ Product releases trigger a go-to-market review.
- ☐ Scoring and routing are checked after every significant launch.

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Where does your system stand?

Answer yes or no. Each “no” is a place to start.

Y	N	
◯	◯	We know whether we run a trial, freemium or demo motion.
◯	◯	Requests arrive in HubSpot with role, company and product interest.
◯	◯	If we run a product-led motion, product activity is visible to marketing and sales.
◯	◯	We score fit and intent separately.
◯	◯	Sales and marketing agree on what qualified means.
◯	◯	Every qualified lead has an owner and a response expectation.

Y	N	
◯	◯	Field ownership between HubSpot and Salesforce is documented.
◯	◯	Duplicates and consent are monitored.
◯	◯	Product releases trigger a go-to-market review.
◯	◯	Every integration has a named owner.
◯	◯	We track whether qualified demand actually moves through pipeline, using measures such as conversion, sales cycle and pipeline velocity.

HubSpot Solutions Partner Program ELITE

HOW WE WORK WITH SOFTWARE TEAMS.

Vonazon works across marketing, HubSpot, CRM, websites and integrations, so go-to-market changes don’t create another disconnected system each time the business evolves.

Talk to Us

