

From
fragmented
data to
predictable
growth

WOODY'S





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HOW C-LEVEL REVENUE LEADERS BUILD CONFIDENCE ACROSS THE BUYER JOURNEY

Executive summary: Predictable growth is a data problem

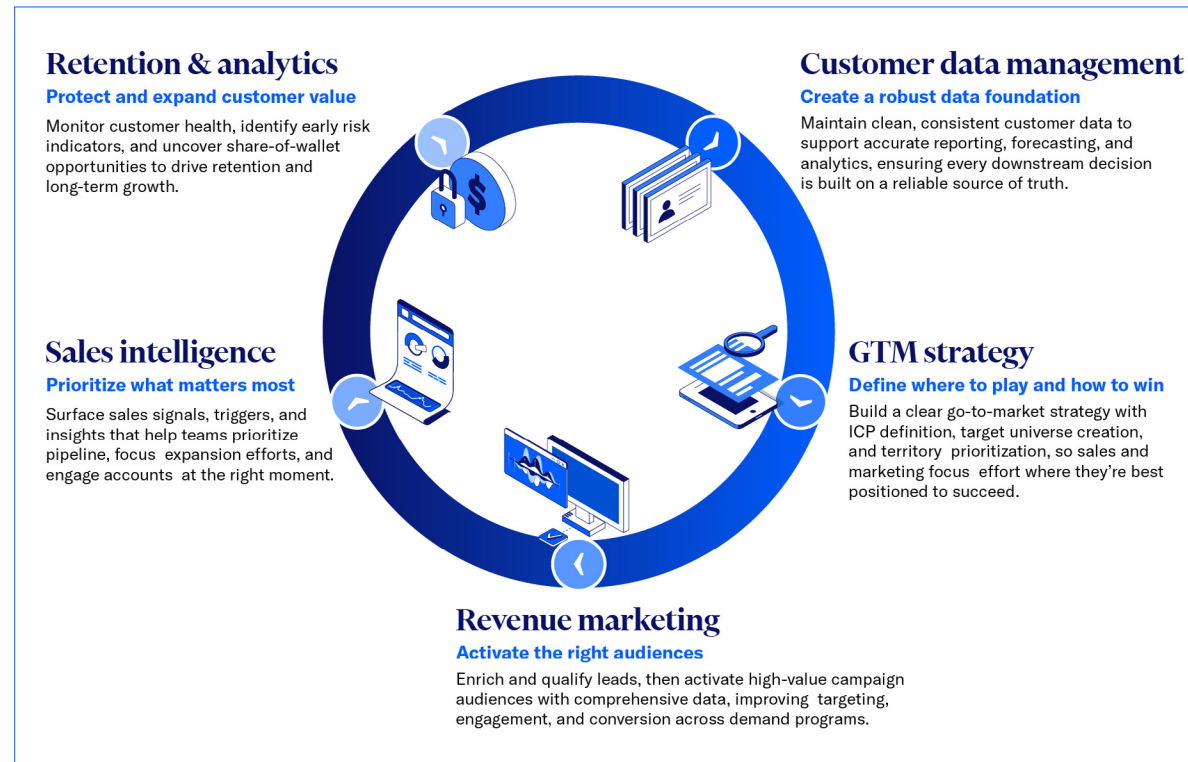
Every revenue leader is chasing the same outcome: predictable, repeatable growth.

Yet growth consistently breaks down for several reasons. Decisions are made without confidence. Customer data is fragmented across systems. Signals arrive too late or without context. Sales and marketing teams are forced to guess where to focus, who to prioritize, and when to act.

In this environment, even best-in-class customer relationship management (CRM) platforms fall short.

CRM systems record activity, but they don't tell you which customers matter most, where risk is emerging, or where growth is most likely to occur next.

Moody's helps sales and marketing leaders transform CRM data into authoritative revenue intelligence, connecting verified company data, ownership structures, and decision-maker contacts with real-time risk and growth signals. The result is confidence at every stage of the revenue life cycle, from first touch to long-term value expansion.



This e-book walks through the five life cycle stages of the modern buyer journey, demonstrating how leading organizations across corporates and banking move from fragmented data to scalable growth.

Stage 1: Customer data management

START WITH AUTHORITATIVE CUSTOMER DATA

If your CRM systems don't agree, every downstream decision suffers.

Most organizations struggle with customer data that is incomplete, outdated, duplicated, or inconsistent across lines of business. The impact is immediate and costly: dirty pipelines, unreliable forecasting, poor reporting, and wasted seller time.

This stage is about fixing the root cause.

Leading revenue teams establish a clean, consistent, continuously refreshed view of every company and contact, aligned to an authoritative foundational data model. Records are deduplicated, enriched, and governed at the entry point before bad data propagates across systems.

- For corporates, this eliminates productivity drag caused by fragmented data across business units.
- For banks, it ensures customer data supports downstream decisioning, consolidated insights, and system interoperability.
- For insurance organizations, it aligns CRM with policy administration and workbenches, improving data quality at first contact, including clearance and sanctions checks.

When data is clear at the entry point, every workflow downstream moves faster.

OUTCOME:

Clean data at the entry point →
comprehensive decisions everywhere



CASE STUDY

Fixing the foundation before scaling growth

THE CHALLENGE

A global corporate and investment banking group was investing heavily in CRM modernization, yet sales leaders still lacked confidence in pipeline reports. Customer records were duplicated across regions, ownership hierarchies were inconsistent, and relationship managers spent significant time validating basic account information before engaging clients.

WHAT CHANGED

The organization established a single, authoritative customer data layer aligned across CRM, onboarding, and downstream decision systems. Company records were deduplicated, hierarchies were standardized, and key decision-maker contacts were enriched at the point of entry, all before data flowed into marketing, sales, and risk workflows.

THE IMPACT

Sales and marketing teams began working from the same version of truth. Reporting stabilized, onboarding friction dropped, and sellers spent more time engaging clients instead of correcting records.

TAKEAWAY

Predictable growth doesn't start with better campaigns or better sellers but rather with comprehensive data at the entry point.



Stage 2: GTM strategy

PLAN GROWTH WITH CONFIDENCE

Go-to-market (GTM) strategies fail for a simple reason: Planning is built on assumptions instead of evidence.

Territories, segmentation, and targets are often defined using incomplete or inaccurate data, leading to misaligned coverage, low productivity, and poor return on investment.

In this stage, revenue leaders move from estimation to quantification.

By grounding GTM planning in authoritative company data, organizations can accurately size markets, identify white space, and prioritize best-fit opportunities, aligning territories and targets to where they are truly positioned to win.

- Corporate sales and marketing teams gain sharper segmentation, better targeting, and less wasted effort.
- Banking growth teams focus acquisition on prospects aligned to their services, capabilities, and commercial strategy.
- Insurance teams gain clearer visibility into client hierarchies, spend concentration, and coverage gaps.

Capabilities such as white-space analysis, ideal customer profiling, look-alike modeling, and territory management turn GTM planning from “best guess” into best fit.

OUTCOME:

Verified opportunity replaces assumption-driven planning.



CASE STUDY

Turning market potential into executable growth plans

THE CHALLENGE

A multinational corporate services firm struggled with uneven territory performance. Some teams were overloaded while others chased low-value accounts. GTM planning relied on historical revenue and intuition rather than a true view of market opportunity.

WHAT CHANGED

By grounding GTM planning in authoritative company data and ownership structures, leadership quantified total addressable market, identified white space, and rebuilt territories around where the firm was best positioned to win, not just where it had sold before.

THE IMPACT

Territories became more balanced, coverage improved, and sellers focused on higher-value prospects. Planning conversations shifted from defending assumptions to aligning on evidence.

TAKEAWAY

Confidence in growth planning comes from knowing where opportunity actually exists, not where it's always been.



Stage 3: Revenue marketing

TURN SIGNALS INTO PIPELINE

Marketing doesn't struggle because of effort. It struggles because of signal ambiguity.

When teams can't identify the external forces influencing buyer behavior, opportunities are missed, prioritization breaks down, and conversion rates suffer.

This stage is built for precision over volume.

By enriching CRM and marketing automation with digital, operational, and risk-aware datasets on accounts and contacts, revenue teams create high-confidence audiences and intelligent lead flows, prioritizing handoff to sales based on readiness and relevance instead of noise.

- Corporate teams see cleaner targeting and faster pipeline conversion.
- Banking teams improve qualification and discovery by clarifying fit with risk appetite, wallet size, decision-makers, and product alignment.
- Insurance growth teams reduce time spent by analysts and underwriters by improving data inputs earlier, supported by industry, economic, and news signals.

Revenue marketing becomes measurable, accountable, and defensible.

OUTCOME:

- Build audiences → prioritize leads
- accelerate handoff



CASE STUDY

Moving from volume-based demand to precision pipeline

THE CHALLENGE

A global bank's marketing team generated high lead volumes but struggled with conversion. Sales questioned lead quality, and marketers lacked visibility into which accounts were truly sales-ready.

WHAT CHANGED

Marketing aligned account-based strategies to enriched CRM data and external signals, layering firmographics, ownership context, economic indicators, and relevant news to prioritize accounts and contacts based on fit and readiness rather than just activity.

THE IMPACT

Lead handoff became more intentional. Sales engagement increased, discovery conversations improved, and marketing performance became measurable in pipeline contribution, not just volume.

TAKEAWAY

Modern revenue marketing isn't about more leads. It's about clearer signals and undeniable handoffs.



Stage 4: Sales Intelligence

STOP WINGING IT. SELL WITH CONTEXT.

Sales acceleration breaks down when sellers don't have the full picture.

Too often, reps enter conversations without relationship history, market context, or insight into what matters most right now. Prioritization suffers, preparation is inconsistent, and productivity declines.

In this stage, organizations combine data, signals, and AI-driven intelligence to support sellers before, during, and after every interaction.

Foundational account and contact data are triangulated with sales triggers, historical context, and institutional knowledge to recommend the next best actions.

- Corporate sales teams focus on the right accounts with better conversations.
- Banking teams strengthen qualification and discovery, assessing risk fit, opportunity size, and decision dynamics.
- Insurance teams, including brokers and managing general agents, improve placement and underwriting outcomes with deeper prospect intelligence.

Sales move from reactive to intentional.

OUTCOME:

Data, signals, and context →
next best actions



CASE STUDY

Equipping sellers with context, not just contacts

THE CHALLENGE

A large insurance brokerage saw inconsistent sales performance across regions. Top performers prepared diligently for client conversations whereas others relied on intuition and last-minute research.

WHAT CHANGED

Sales teams were equipped with contextual intelligence combining foundational account data, relationship history, relevant market signals, and AI-driven recommendations for next best actions, all surfaced directly in existing workflows.

THE IMPACT

Sales preparation became consistent. Reps prioritized the right accounts, entered meetings better informed, and advanced opportunities faster. New hires ramped more quickly by inheriting institutional knowledge instead of rebuilding it.

TAKEAWAY

Great sellers don't wing it; they depend on context, timing, and clarity.



Stage 5: Retention and analytics

PROTECT REVENUE. GROW THE RELATIONSHIP.

Retention rarely fails overnight. It fails quietly.

When institutional knowledge isn't captured and monitored, warning signs go unnoticed, especially amid staff turnover and fragmented systems.

This stage helps revenue leaders quantify what matters most: risk and retention, wallet share, and expansion opportunity.

By combining internal and external data with AI and advanced analytics, teams stay proactive rather than reactive.

- Corporate teams identify which accounts are healthy, which are drifting, and where expansion is real.
- Banking teams monitor account performance through intelligence gathering, credit reviews, and usage analytics while learning from lost opportunities.
- Insurance teams improve renewal management, retention analytics, and customer health metrics across complex hierarchies.

Retention becomes a system that learns and improves over time.

OUTCOME:

- Detect risk early → act fast**
- expand value

CASE STUDY

Preventing revenue loss before it shows up in results

THE CHALLENGE

A diversified corporate group experienced unexpected account churn despite strong historical relationships. Warning signs existed, but they were buried across disconnected systems and teams.

WHAT CHANGED

Leadership implemented a life cycle analytics approach that combined internal performance data with external risk and growth signals. Team members continuously monitored accounts for early indicators of drift, consolidation risk, or expansion opportunity.

THE IMPACT

Relationship teams intervened earlier, protected at-risk revenue, and identified cross-sell and upsell opportunities that had previously gone unnoticed. Retention became proactive instead of reactive.

TAKEAWAY

Retention is not a relationship problem; it's a visibility problem.



Conclusion: The revenue life cycle as a competitive advantage

Predictable growth isn't driven by more tools or activity. It's driven by confidence in data, signals, and decisions.

By treating the buyer journey as an integrated life cycle instead of disconnected functions, C-suite leaders can align marketing and sales around a single source of truth, unlock productivity, and build durable growth.

Make the CRM trustworthy, then scale everything else.

About Moody's Corporation

Moody's growth and strategy solutions help sales, marketing, and revenue leaders turn fragmented customer data into authoritative growth intelligence. Built on global coverage of more than 625 million public and private entities, Moody's turns connected company, ownership, risk, financial, and real-time event data into usable intelligence. This helps teams anticipate customer needs, prioritize high-value opportunities, strengthen customer relationships, and drive growth through insight-led engagement. Learn more at moodys.com/sales-and-marketing.



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