IDC

Validate your GTM strategy:

How to de-risk and double down



CMO's 2026 GTM validation guide

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Executive summary

At the start of the year, marketing leaders face their highest expectations and their lowest tolerance for error. Boards want momentum. CEOs want confidence. Sales wants pipeline. Yet many GTM strategies still assume there will be time to course-correct if early bets are wrong.

There usually isn't.

This brief draws on exclusive IDC insights, including IDC's B2B Tech Buyer Behavior Survey, Marketing Investment Planner, and CMO Realities research, to pressure-test how and where GTM strategies succeed, or fail.

IDC research shows that marketing budgets are holding steady or increasing, but scrutiny has intensified. Seventy-one percent of CMOs report flat or rising marketing spend, even as expectations for measurable revenue impact increase (IDC CMO Realities). Marketing is no longer protected by brand halo; what gets funded must prove contribution to growth.

In this environment, being directionally wrong early is far more damaging than moving slowly.

The most common failure mode is not poor execution. It's betting early on the wrong markets and discovering it too late to recover. Pipeline is a lagging signal. By the time it reflects reality, budgets are spent, teams are aligned, and organizational momentum makes reversal difficult.

At the same time, buyer behavior has structurally shifted. IDC's 2025 B2B Tech Buyer Behavior Survey shows that 71% of buyers now prefer interactive digital channels and 80% rely on digital sources for complex buying decisions. Markets that require education, category reframing, or behavior change absorb spend without producing early signal.

The core rule is simple: If a market cannot prove urgency without heavy early spend, it should not receive heavy spend.

This brief provides CMOs with:

- A clear POV on why early GTM risk is different
- A decision framework to validate markets before scaling
- A "Market Kill List" to eliminate fragile bets early
- A scorecard to force explicit executive tradeoffs

This isn't about being conservative. It's about capital discipline, ensuring growth investment is concentrated where momentum already exists, not trapped in markets that cannot convert fast enough to matter this year.



The most expensive time to be wrong

Once markets are selected, budgets allocated, and messaging launched, reversing direction becomes expensive. Even when data later proves a bet was wrong, sunk cost and organizational momentum often keep it alive.

Early commitments increasingly lock in technology, not just tactics.

4.4%

of total marketing budgets are allocated to marketing technology, making early GTM decisions harder to reverse once platforms, data flows, and workflows are in place.

IDC Marketing Investment Planner 2025

In today's environment, where marketing spend is under heightened scrutiny, being directionally wrong early is far more damaging than moving slowly. Early-year decisions set constraints that are difficult to undo later, regardless of execution quality.

IDC research shows that marketing budgets aren't collapsing, but scrutiny has intensified. Marketing is no longer insulated by brand halo; funding must prove contribution to growth.

Pipeline confirms mistakes, it doesn't prevent them

Many GTM strategies rely on pipeline as the primary validation mechanism. The logic feels sound: launch, monitor early indicators, then optimize.

The problem is timing.

Pipeline is a lagging signal. By the time it reflects reality, investment decisions have already been made, teams aligned, and executive narratives set. At that point, the cost of course-correction is no longer theoretical, it's sunk.

Once early spend is deployed, reallocating it later becomes exponentially harder, especially when results are ambiguous rather than clearly negative.

Early failures rarely announce themselves as failure. They appear as mediocre performance that quietly limits upside for the rest of the year, long before pipeline makes the problem obvious.



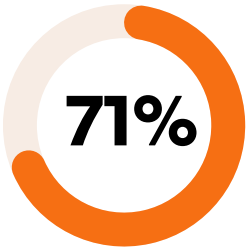
Buyers have moved on, many GTM plans haven't

One of the most common sources of early underperformance is a mismatch between where demand materializes and where GTM teams focus.

IDC's 2025 B2B Tech Buyer Behavior Survey shows a structural shift. B2B buyers prefer digital channels, information sources, and engagements across evaluation, purchase, and renewal stages of the buying journey.

The implication is clear. Markets that require education, category reframing, or behavior change may be strategically attractive, but they convert poorly when urgency matters. They consume spend before producing signals.

The beginning of the year rewards markets where buyers are already in motion.



of B2B buyers now prefer interactive digital engagement and 80% rely on digital sources for complex buying decisions.

IDC 2025 B2B Tech Buyer Behavior Survey

Fast-growing markets are often the hardest to win

Another common miscalculation is equating market growth with GTM viability. Growth attracts competitors, compresses differentiation, and raises the cost of winning attention faster than most models assume.

Marketing investment grew 10.8% YoY, even as budget ratios declined, signaling reallocation, not retrenchment.

IDC Marketing Investment Planner 2025

IDC's Marketing Investment Planner 2025 shows this clearly. While the average marketing budget ratio decreased to 2.8% of revenue, overall marketing investment still grew year over year. In several sectors, increased spend is defensive, not accelerative. On-premises software providers, for example, increased marketing investment to counter competitive pressure from cloud vendors (IDC Marketing Investment Planner).

In these environments, execution advantages erode quickly. Late entrants subsidize incumbents. Cost per result rises. Differentiation becomes harder to sustain.

If early success depends on flawless execution or outspending better-positioned competitors, the market, not your team, will decide the outcome.

What high-performing CMOs do differently

Top-performing CMOs are not immune to uncertainty. They manage it deliberately.

They narrow focus early. They pressure-test assumptions with external evidence. They treat the beginning of the year as a commitment point, not a sandbox.

IDC research shows marketing leaders increasingly fund in microbursts tied to learning milestones, enabled by AI and real-time insight, rather than locking full-year allocations upfront (IDC CMO Realities). AI is collapsing the time between signal and decision, allowing leaders to identify what is (and isn't) working faster.

The differentiator is not better execution. It's earlier validation.

Focus isn't a constraint. It's a risk strategy.

Where external validation changes the equation

Internal dashboards show what happened. They rarely show whether a bet ever made sense.

By combining buyer-side data, competitive analysis, and analyst interpretation, IDC enables CMOs to pressure-test GTM assumptions before they harden into commitments. IDC data helps leaders distinguish:

- Markets with real buyer urgency from those with deferred interest
- Competitive environments that are survivable from those that are structurally hostile
- Near-term revenue opportunity from long-term narrative appeal

> Organizations using data-driven validation frameworks are better positioned to reallocate investment quickly and defend decisions under scrutiny.
>
> –IDC Marketing Investment Planner

The question that determines your GTM outcome

The most dangerous assumption CMOs make at the start of the year is not that a market might fail. It's assuming there will be time to fix it.

The first half of the year doesn't determine its entirety, but it sets the constraints under which the rest of the year operates. The markets you prioritize now dictate where attention flows, where credibility accumulates, and where recovery remains possible.

The real question isn't whether your team can execute. It's whether you're betting on the right markets before execution begins.

What this means for strategic decisions

Most GTM plans are already emotionally and operationally locked in early in the year. Budgets have been allocated, teams aligned, and executive expectations set. That is precisely why early decisions carry disproportionate weight and why the wrong ones are so difficult to reverse.

This brief is not arguing for caution. It's arguing for capital discipline.

The single most important implication for GTM planning is this: If a market cannot prove urgency without heavy spend, it should not receive heavy spend.

Urgency is the only reliable early-year signal that converts efficiently. Markets that require education, narrative reframing, or behavior change may still be strategically important, but this is not when they should absorb the majority of your investment. When urgency is absent, spend creates activity, not momentum.

For CMOs, this means three things in practice:

1. First, early in the year is the time to narrow, not expand. Fewer markets, fewer messages, fewer bets but with higher confidence behind each one.
2. Second, validation must happen before scale, not alongside it. Waiting for execution to reveal truth isn't agile; it's expensive.
3. Third, success should be defined less by volume and more by signal quality. Early clarity about what not to pursue is as valuable as early wins.

GTM validation toolkit: Make early decisions for year-long impact

Simple tools to decide where to commit early, and where to hold back, before spend and expectations are locked in.

Market kill list: Fragile bets to eliminate early

If any one of the conditions below is true, the market should not receive early scaled investment, regardless of how attractive it looks on paper.

1. Urgency requires education

If demand depends on explaining a new problem, reframing buyer priorities, or changing established behavior, early in the year is the wrong quarter to force momentum. These markets consume spend before they produce signal.

2. Pipeline is the first proof point

If the plan assumes early pipeline will validate the bet, validation is already too late. Pipeline confirms outcomes after capital has been committed, not before.

3. Competition is manageable, but not favorable

If incumbents control default consideration, pricing expectations, or buyer trust, early activities will expose this disadvantage rather than overcome it. Execution does not neutralize structural power quickly.

4. Buyer urgency is inferred, not observed

If urgency is based on market narratives, analyst enthusiasm, or internal optimism rather than buyer-side behavior, delay scale. Assumed urgency is the most common source of GTM waste.

5. The plan only works with perfect execution

If success depends on messaging landing immediately, sales converting above benchmark, or campaigns outperforming historical norms, the strategy is fragile.



IDC rule of thumb:
Scale only what is already moving. Everything else belongs in validation, not execution.

GTM market validation scorecard

Before approving scaled investment, pressure-test each priority market against the four dimensions below.

Dimension	Green	Yellow	Red
Buyer urgency	Active buying	Interested but delayed	Needs education
Competitive structure	Fragmented or open	Crowded	Incumbent-dominated
Demand evidence	Buyer-side data	Internal indicators	Assumptions
Time to signal	≤30 days	45-60 days	>60 days

Decision rules:

- **All GREEN** — Eligible for scale
- **Two or more YELLOW** — Delay or limit investment
- **Any RED** — Don't scale in yet

This scorecard isn't about precision. It's about forcing explicit tradeoffs early, before momentum and sunk cost make them impossible.

“This sounds smart, but isn’t it just conservative?”

This is the most common executive objection, and the most dangerous. It usually sounds like this: “Where’s the proof that validation beats execution?”

IDC research proves this isn’t about doing less. It’s about avoiding irrecoverable waste.

6 in 10 CMOs have moved away from rigid annual plans toward quarterly, scenario-based planning to respond faster to when assumptions fail, precisely because static commitments in volatile environments increase downside risk. This shift exists because waiting for confirmation costs more than acting with evidence. (IDC CMO Realities)

Execution doesn’t compensate for lack of urgency. IDC’s B2B Tech Buyer Behavior Survey shows that buyers are already deep into digital-first evaluation before vendors engage. Markets without inherent urgency do not accelerate simply because vendors spend more; they absorb spend until buyer timing catches up, often too late to benefit the current year.

This approach isn’t conservative; it’s proactive. IDC’s Marketing Investment Planner research shows that **overall marketing investment grew 10.8% year over year, and budgets were reallocated toward programs and markets that could demonstrate impact**. Leaders aren’t pulling back, they’re concentrating firepower where returns are provable.

The real risk isn’t delaying a market. It's committing early to the wrong one. By the time pipeline confirms a misstep, the budget is spent, narrative set, and opportunity cost is locked in. Validation doesn’t slow growth. It prevents growth from being trapped in the wrong places.

2026 is already in motion. Are you prepared to keep pace?

Before momentum locks in direction, IDC can help you pressure-test where to commit and where to wait, so you can adapt with confidence as markets move.

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