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How Product-Led Should Your Go-to-Market Strategy Be?

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27 February 2024

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Published 27 February 2024 - ID G00805575 - 15 min read

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Initiatives: Product/Service Introduction and Delivery; Foundations of Product Introduction; Product and Services Strategy for Tech CEOs; Tech Marketing Approaches

Although the concept of product-led growth may be enticing, an exclusively product-led growth strategy cannot be successful in every situation. Product leaders should use the Gartner Product-Led Growth Fit Matrix to assess how far a product-led growth strategy can take their product or portfolio.

Overview

Key Findings

- Product-led growth (PLG) concepts can be implemented to different degrees, ranging from a few supplementary techniques to a fully committed product-led growth strategy.
- Product-led growth does not work equally well in all circumstances. Characteristics of the market, the product offering and the value it provides influence how successful product-led growth concepts will be for a given product.

Recommendations

Product leaders considering adopting a product-led growth strategy for product introduction should:

- Determine how far to go with product-led growth — identifying whether a sales-led, hybrid or fully product-led growth strategy will prove most effective in their environment — by assessing critical characteristics of their product and the value it delivers.
- Drive increased user awareness and advocacy by implementing those product-led-growth techniques that are appropriate for their overall strategy.

Introduction

Interest in product-led growth (PLG) continues to expand throughout the tech industry — and rightfully so. When successful, PLG offers providers a path to transformational improvement in business results.

PLG promises not just greater success for customer acquisition, but also higher customer retention and increased customer lifetime value through expansion and upsell. PLG may also enable a provider to decrease investment in traditional sales and marketing activities (on a percentage of revenue basis).

PLG is a go-to-market strategy that relies on the product as the main vehicle for user acquisition, activation and expansion. Growth begins by enticing users to try a product and experience its value firsthand. To be successful, PLG requires internal teams to fully align toward the objective of offering a superior product and customer experience. It is this superior experience that delights users, such that they increase their adoption and pay (or pay more) for the product and spread awareness to other potential users.

High-profile technology providers such as Atlassian, Datadog and Twilio have achieved tremendous success with PLG, leading many industry executives and investors to encourage their product teams to investigate applying the strategy to both new and existing products. This is especially true for SaaS offerings.

While product leaders may be intrigued by the visible success of PLG in the industry, they must still evaluate whether the approach can work effectively for their offerings. The anticipated return on investment in user experience and engagement may not be compelling, particularly in situations where the product user has limited influence on the buying decision.

While this research is intended for the product leader, the decision to implement PLG is not owned by the product leader alone. Due to its cross-functional impact, engineering, marketing, sales, customer success and finance are generally involved in making (or at least supporting) the decision. The product leader's responsibility is to recommend if, and to what extent, a shift to PLG should be made. The Gartner PLG Fit Matrix (described in this document) provides a framework for product leaders to evaluate the appropriateness of PLG for their current and planned offerings, and to align their organizations in implementing the optimal mix of PLG techniques. Where the current offerings are not appropriate for PLG, a product leader may recommend creating a new offering (potentially by leveraging existing product capabilities) that is optimized for product-led growth.

Analysis

Assess the Product's Fit for PLG

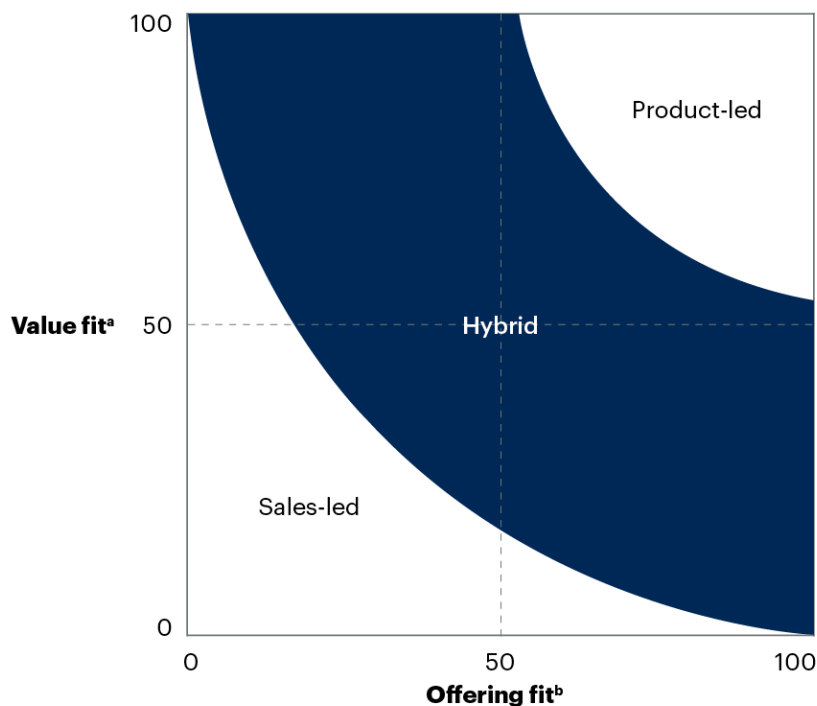
Our analysis of technology product offerings that have — and have not — demonstrated success with PLG reveals that success is not based solely on executing the strategy. Rather, success is determined by the type of value the offering delivers (including the user personas and complexity of the value proposition), and specific product characteristics. By assessing dimensions of the “value fit” and “offering fit” for PLG, the offering can be plotted on Gartner’s PLG Fit Matrix to recommend the most appropriate overall strategy (see Figure 1). We classify the strategic choices into three high-level options:

1. **Sales-led** — Growth is driven through traditional technology marketing and sales methods that focus primarily on the buyer or economic decision maker. The go-to-market approach may be supported by selected PLG techniques to drive user advocacy.
2. **Hybrid** — Growth depends on using PLG techniques to drive awareness and make inroads into prospect accounts, but it relies on sales representative activities to drive most of the revenue.
3. **Product-led** — As a fully embraced strategy, growth follows from focusing on the user and their experience with the product as the primary path to revenue.

Figure 1: The Gartner PLG Fit Matrix

The Gartner PLG Fit Matrix

Illustrative



Source: Gartner

^a The value fit score ranges from 1 to 100 and reflects how conducive the value delivered by the offering is to a PLG approach.

^b The offering fit score ranges from 1 to 100 and reflects how conducive the nature of the offering is to a PLG approach.

PLG = product-led growth

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To use the Gartner PLG Fit Matrix, a product leader should score their offering on a scale of zero to five for each of the dimensions described subsequently. A score of five should be given if the product aligns with the ideal characteristics described for a product-led growth strategy. Conversely, a score of zero should be given if the product aligns with the ideal characteristics for a sales-led growth strategy. Scores of one, two, three or four should be given to reflect cases where the product partially fulfills or falls between the characteristics described.

The Five Dimensions of Value Fit

The following are the key dimensions of core product value that determine alignment with a product-led growth strategy:

1. **Target Customer Segment** — Who is the target user for the product? PLG is most successful with a clear focus on initially solving a problem for a single user persona.

2. **User-Buyer Alignment** — Are the users of the product the same as the buyers?
According to Gartner user survey results, users play an active role in the majority of purchases (78%) of applications acquired through free trial, freemium or open-source engagement. ¹ Reliant on these techniques for initiating user engagement, PLG is most successful where the user is empowered to make a purchase or has significant influence over the buyer. Personal productivity tools are often selected and initially purchased directly by the user, while users hold less sway over enterprisewide systems (such as ERP tools which are more likely to be controlled by the IT department).
3. **Value Articulation** — Is the value of the product obvious or easy to communicate to the user? PLG is most successful where the product's purpose and value are self-evident to the user.
4. **Time to Value** — Is the business value of the product quickly visible? PLG is most successful when the user can see value in minutes or hours — with little or no dependency on others — rather than over weeks or months.
5. **Organic Virality** — Will happy customers spread the word? PLG is most successful when users share their experience and encourage adoption by their peers.

To score each dimension on the zero-to-five scale, compare your product to the characteristics described in Table 1. Then, total the results and multiply them by four to determine the value-fit position on the y-axis.

Table 1: Dimensions of Value Fit

(Enlarged table in Appendix)

Value-Fit Dimension	Ideal Characteristics for a Fully Sales-Led Growth Strategy (Score = 0)	Ideal Characteristics for a Fully Product-Led Growth Strategy (Score = 5)	Score for Your Offering (0 to 5)×4
Target Customer Segment	<ul style="list-style-type: none"> ■ Nontechnical users ■ Large customer organizations 	<ul style="list-style-type: none"> ■ Technical users ■ Smaller organizations 	
User-Buyer Alignment	<ul style="list-style-type: none"> ■ Buyer does not use the product ■ Buyer is not influenced by users 	<ul style="list-style-type: none"> ■ User is the buyer or user heavily influences the buyer 	
Value Articulation	<ul style="list-style-type: none"> ■ Difficult to explain the product's value 	<ul style="list-style-type: none"> ■ Purpose, usefulness and value to the user and/or business is self-evident 	
Time to Value	<ul style="list-style-type: none"> ■ Months or years required to see value after purchase 	<ul style="list-style-type: none"> ■ Valuable to user at initial use ■ Value scales quickly with increased adoption 	
Organic Virality	<ul style="list-style-type: none"> ■ Users not likely to talk about the product or even admit to use ■ No possibility of users inviting other users 	<ul style="list-style-type: none"> ■ Broadly applicable ■ Users likely to tell peers ■ Users will invite other users through normal use 	

Source: Gartner (February 2024)

The Five Dimensions of Offering Fit

The following are the key dimensions of the complete offering's alignment (including and around the product itself) with a product-led growth strategy:

1. **Packaging** — Does the product packaging support self-service land-and-expand adoption? PLG is most successful where there is a free starter package and easy-to-understand packaging options.
2. **Pricing** — Does the pricing scale with customer adoption and value? PLG is most successful where the entry price is low and scales with increased usage.
3. **Onboarding/Implementation** — Can a user get started quickly and easily? PLG is most successful where a user does not need approval from their organization to begin and the implementation effort is negligible.
4. **User Experience** — Is the user experience (UX) delightful? PLG is most successful when the UX is intuitive and compelling.
5. **Cost of Delivery** — What is the cost to the provider of supporting free users? PLG is most successful when additional users can be added with negligible incremental cost.

To score each dimension on the zero-to-five scale, compare your product to the characteristics described in Table 2. Then, total the results and multiply by four to determine the offering-fit position on the x-axis.

Table 2: Dimensions of Offering Fit

(Enlarged table in Appendix)

Offering-Fit Dimension	Ideal Characteristics for a Fully Sales-Led Growth Strategy (Score = 0)	Ideal Characteristics for a Fully Product-Led Growth Strategy (Score = 5)	Score for Your Offering (0 to 5)×4
Packaging	<ul style="list-style-type: none"> ■ Single, large, monolithic offering 	<ul style="list-style-type: none"> ■ Free starter package ■ Straightforward tiers or package options 	
Pricing	<ul style="list-style-type: none"> ■ Custom price must be quoted after consultation with sales ■ Pricing is capped for each account 	<ul style="list-style-type: none"> ■ Low entry price ■ Consumption-based pricing or similarly transparent scaling of price with scope of use 	
Onboarding/Implementation	<ul style="list-style-type: none"> ■ Corporate approval required ■ Security concerns ■ System integration required ■ Long, expensive implementation effort 	<ul style="list-style-type: none"> ■ User can independently adopt ■ No installation ■ No configuration required ■ No formal training required 	
User Experience	<ul style="list-style-type: none"> ■ Complex UI ■ Usage requires significant outside knowledge 	<ul style="list-style-type: none"> ■ Intuitive ■ Compelling UX ■ Easy self-service sign-up 	
Cost of Delivery	<ul style="list-style-type: none"> ■ High infrastructure cost per customer ■ Labor-intensive service or support 	<ul style="list-style-type: none"> ■ Can support large number of free users ■ Negligible incremental cost per user 	
UX = user experience			

Source: Gartner (February 2024)

Plotting the value fit and offering fit scores on the matrix will suggest an overall strategy of sales-led, hybrid or product-led growth. To keep the model simple to use, it does not include weightings for the dimensions or adjustments for edge cases.

“If your offering rates as a zero in any of the dimensions, consider the dimension more closely, as there may be a showstopper issue preventing you from adopting a PLG or hybrid approach.”

An example of scoring an offering and plotting the result on the matrix is included in Note 1.

Adopt the PLG Techniques Appropriate for Your Strategy

It is a common misconception that PLG is an all-or-nothing decision. A “product-led growth strategy” (for clarity, referred to in this research as a “fully product-led growth strategy”) implies embracing PLG in place of more traditional sales and marketing efforts. Yet PLG techniques can also be used as a supplement rather than a full replacement for traditional go-to-market approaches.

The list of methods, tools and techniques associated with product-led growth is long and continues to evolve. While we refer to them as “PLG techniques,” most of these user-engagement-related approaches predate the advent of the term “product-led growth” and their coordinated use in a go-to-market strategy. PLG techniques all share an emphasis on winning over the user of the product rather than an initial goal of persuading the buyer to purchase. User focus can be applied in varying ways to almost any technology product. Therefore, the question for product leaders is not, “Should I adopt a PLG strategy?” but rather, “Which PLG techniques should I employ to drive greater success with my chosen strategy?” This is why all of the techniques listed apply to a full PLG strategy, only a subset of them make sense to apply in a hybrid strategy, and a smaller subset is applicable to a sales-led growth (SLG) strategy.

While hard and fast rules for applying PLG techniques are not possible due to differences in the detailed circumstances surrounding products, markets and providers, we provide guidelines in Figure 2 for the PLG techniques likely to be applicable for sales-led, hybrid and fully product-led growth strategies.

Figure 2: PLG Techniques Applicable to SLG, Hybrid and Full PLG Strategies

PLG Techniques Applicable to SLG, Hybrid, and Full PLG Strategies

Techniques	
PLG	Self-service purchasing Self-service onboarding Referral incentives
Hybrid	Automated nurture campaigns Published pricing User-to-user marketing Freemium Customer self-service and support
SLG	Free trial Product analytics Delightful UX User community Tiered packaging Frictionless expansion

Source: Gartner
PLG = product-led growth; SLG = sales-led growth; UX = user experience
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PLG Techniques Applicable to SLG and Hybrid Strategies

- **Free Trial** — The ability for the customer to use the product for a limited time in a self-service manner without charge. Typically, the customer is permitted to exercise the full range of product features during the trial period.
- **Product Analytics** — Instrumentation used to understand the behavior of users to inform decisions about how to improve the product experience and increase product engagement.
- **Delightful UX** — The design goal of making users not simply satisfied with a functional user experience, but making the user experience easy, intuitive and enjoyable.
- **User Community** — An organization of product users interacting in a peer-to-peer manner to exchange knowledge and provide mutual support for product usage.
- **Tiered Packaging** — Packaging design in which the included features increase in a structured way, for example, “good,” “better,” and “best” versions, making the packaging options easy for customers to understand without explanation from a salesperson.

- **Frictionless Expansion** — The design of packaging, pricing and customer agreements to enable customers to buy more and higher-value products without requiring a traditional buying process.

PLG Techniques Applicable to Hybrid Strategies

- **Automated Nurture Campaigns** — A series of email or in-product messages to inform users (and motivate them) to take advantage of the opportunity for expanded product functionality. For example, the opportunity to upgrade from a free to paid tier of the product.
- **Published Pricing** — Pricing information made freely available on the provider's website, without a prospect having to engage in a dialogue with a sales representative.
- **User-to-User Marketing** — The ability for a product user to easily make another potential user aware of the product, for example via a link within the product to invite another user.
- **Freemium (Free Tier)** — A free version of a product that delivers clear value to the user is offered with access to a limited set of features or limited capacity. The customer has an ongoing option to convert to a premium version of the product that includes more features or capacity, but requires payment.
- **Customer Self-Service and Support** — Customers can obtain product support through self-service resources and automated interactions.

Techniques Applicable Only to Full PLG Strategies

- **Self-Service Purchasing** — The ability for a customer to purchase the product without interacting with a sales representative. This includes visibility, reporting and management of usage and billing.
- **Self-Service Onboarding** — The ability for a new user to begin using the product without an implementation project or outside assistance.
- **Referral Incentives** — A compensation offer for existing users to refer the product to new users. Compensation may be financial or in the form of product usage credits.

Conclusion

PLG can lead to a transformational change in a provider's business strategy and outcomes by elevating the importance of individual users and the value the users obtain from the product. However, while the potential results of PLG are attractive to a broad range of technology providers, a full PLG strategy will not be successful for all products. Product leaders must evaluate their offerings and customers, and adopt PLG techniques to the degree that is appropriate to optimize their product success.

Evidence

¹ **2023 Gartner User Behavior and Influence Survey.** This survey sought to uncover the mechanisms behind the kinds of tech user behaviors that could affect adoption and, therefore, perceived solution value for buyers. It focused on the software applications used at work, whether provided by the company or acquired independently.

The study was designed to also uncover trends relating to users who engage with vendors executing product-led growth strategies. The survey was conducted online from October 2023 through December 2023, among 4,082 respondents from organizations with at least 100 employees from the United States (38%), France (21%), Germany (21%) and Singapore (20%). Industries surveyed include education providers, energy, financial services, government, health payer, healthcare, insurance, manufacturing and natural resources, media, pharmaceuticals, biotechnology and life sciences, retail, services, technology, telecom, transportation, utilities, and wholesale. Qualified respondents were required to be full-time users or staff (including managers) that use technology products and services for their day-to-day work. They were also required to not be involved in vendor management or procurement.

Disclaimer: Results of this study do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

Acronym Key and Glossary Terms

ERP	enterprise resource planning
PLG	product-led growth
POC	proof of concept
RPA	robotic process automation
SaaS	software as a service
SLG	sales-led growth
UI	user interface
UX	user experience

Note 1: Gartner PLG Fit Matrix Example

To illustrate the use of the PLG Matrix, we consider the hypothetical example of a robotic process automation (RPA) software offering (see Tables 3 and 4).

Table 3: RPA Example — Value Fit

(Enlarged table in Appendix)

Value-Fit Dimension	Score	Comments
Target Customer Segment	4	Technical users at large enterprises
User-Buyer Alignment	4	Users are not buyers, but have significant influence in technology selection
Value Articulation	5	Straightforward value proposition
Time to Value	4	Can demonstrate business value on a small scale quickly
Organic Virality	2	Specifics of the product are not likely to be discussed outside of individuals and groups already involved in the RPA market
Summed Subtotal	19	
Total	76	Multiplied by 4 for axis placement
RPA = robotic process automation		

Source: Gartner (February 2024)

Table 4: RPA Example – Offering Fit

Offering-Fit Dimension	Score	Comments
Packaging	4	Free trial; multiple products that may be difficult to choose between without sales consultation
Pricing	5	Very scalable pricing; self-service buying available for starter packages with month-to-month licensing
Onboarding/Implementation	2	User cannot integrate with existing systems without approval; full implementation can be costly and time-consuming
User Experience	3	Well-designed UI but complex offering
Cost of Delivery	4	Manageable infrastructure costs for POC or pilot projects, but large projects often require support from the provider
Summed Subtotal	18	
Total	72	Multiplied by 4 for axis placement
POC = proof of concept; RPA = robotic process automation; UI = user interface		

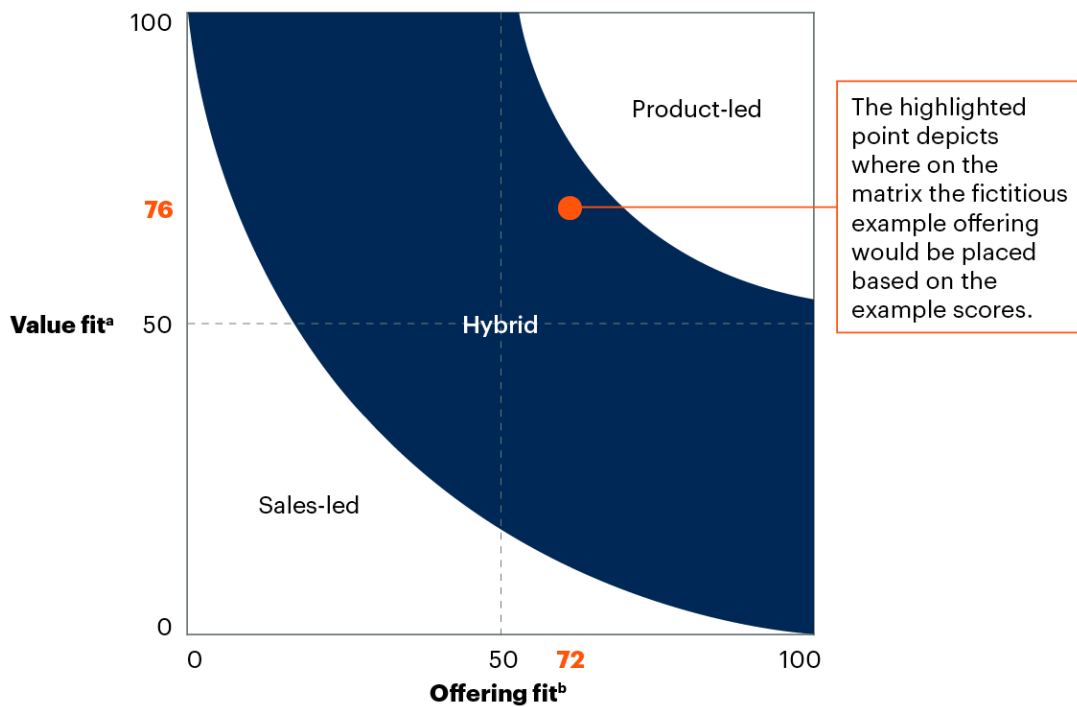
Source: Gartner (February 2024)

Plotting the results on the PLG Fit Matrix, the offering is shown to be in the hybrid growth region of the matrix (see Figure 3).

Figure 3: Robotic Process Automation Provider Example

Robotic Process Automation Provider Example

Illustrative



Source: Gartner

^a The value fit score ranges from 1 to 100 and reflects how conducive the value delivered by the offering is to a PLG approach.

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Document Revision History

How Product-Led Should Your Go-To-Market Strategy Be? - 12 July 2022

Recommended by the Authors

Some documents may not be available as part of your current Gartner subscription.

Product Leader Self-Assessment: Fit for Product-Led Growth

Product Leader Self-Assessment: Performance of Product-Led Growth

2024 Tech Provider Top Trends: PLG and Value Converge for Hybrid GTM

Top Tech Provider Trend for 2023: Product-Led Growth

Can Software Products Generate and Qualify Their Own Leads to Drive Growth?

Infographic: Product-Led Growth and Sales-Led Growth Continuum

Product-Led Growth Requires Product Qualified Leads: Here's How to Create Them Types of 'Free Software' Users That Lead to More Purchases

Quick Answer: What Are the Key Responsibilities for a Product-Led Growth Leader? Enable Product Growth With a Field CTO

Quick Answer: What Software Vendor Actions Drive More Recommendations From Users?

Product Manager Insight: Enterprise Users Demand Consumerlike User Experiences

Tech Providers 2025: Growth of Freemium Programs Requires Product

Leaders to Determine Their Value

3 Critical Steps for Tech CEOs to Optimize Free Offer Conversion Rates

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User Experience	<ul style="list-style-type: none"> ■ Complex UI 	<ul style="list-style-type: none"> ■ Intuitive 	

	<ul style="list-style-type: none">■ Usage requires significant outside knowledge	<ul style="list-style-type: none">■ Compelling UX■ Easy self-service sign-up
Cost of Delivery	<ul style="list-style-type: none">■ High infrastructure cost per customer■ Labor-intensive service or support	<ul style="list-style-type: none">■ Can support large number of free users■ Negligible incremental cost per user
UX = user experience		

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