

GTM Entity-Resolution Starter Template

Use this to decide how ad platforms, product data, CRM, and warehouse records should resolve before AI, attribution, or workflow automation trusts the answer.

1. Name the business question

Decision this identity map must support: CAC / pipeline / activation / churn / expansion / AI answer / other: _____

Executive owner: _____ Operating owner: _____ Review date: _____

2. List the entities that get confused

Person: lead, contact, user, buyer, admin, champion, anonymous visitor, customer success contact.

Account: company, billing account, product workspace, parent account, subsidiary, agency-managed account.

Interaction: ad click, form fill, product event, opportunity touch, lifecycle message, support signal.

3. Choose the grain before matching

Primary reporting grain: person / account / opportunity / workspace / subscription / order / campaign.

Do not mix grains in one metric without naming the handoff rule. A product workspace can make a CRM account look cleaner than it is.

4. Set match rules in order

Exact match: CRM account ID, opportunity ID, product workspace ID, user ID, subscription ID.

Strong deterministic match: normalized domain, hashed email, billing account, known workspace-account bridge.

Weak match: fuzzy company name, personal email domain, UTM source guess, vendor-provided account name.

Fallback rule: if the strong key is missing, classify the record as unresolved instead of silently guessing.

5. Record source precedence

CRM wins for: account owner, opportunity stage, pipeline date, sales accepted date, close date.

Product wins for: active workspace, seat usage, feature event, activation milestone, product-qualified signal.

Ad platform wins for: click ID, campaign, ad group, creative, cost, impression/click timestamp.

Warehouse/model wins for: resolved entity ID, cross-source bridge, metric definition, exclusion logic.

6. Define unresolved states

Unmatched paid click: keep spend and click data, but do not credit pipeline without a later deterministic bridge.

Duplicate account/contact: hold routing or score automation until owner and merge policy are named.

Multi-workspace customer: report account-level health separately from workspace-level activation.

7. Decide what is safe to use

Safe for dashboard: directional counts, caveated trend, known unresolved share under threshold: _____%

Safe for workflow: deterministic entity ID, owner, freshness SLA, suppression rule, rollback owner.

Safe for AI answer: certified metric definition, resolved entity path, caveat text, source owner, review cadence.

Domain Methods next step

If identity rules are unclear, start with the AI-Ready Data Diagnostic or Data Foundation before trusting an AI answer, attribution model, or activation workflow.