

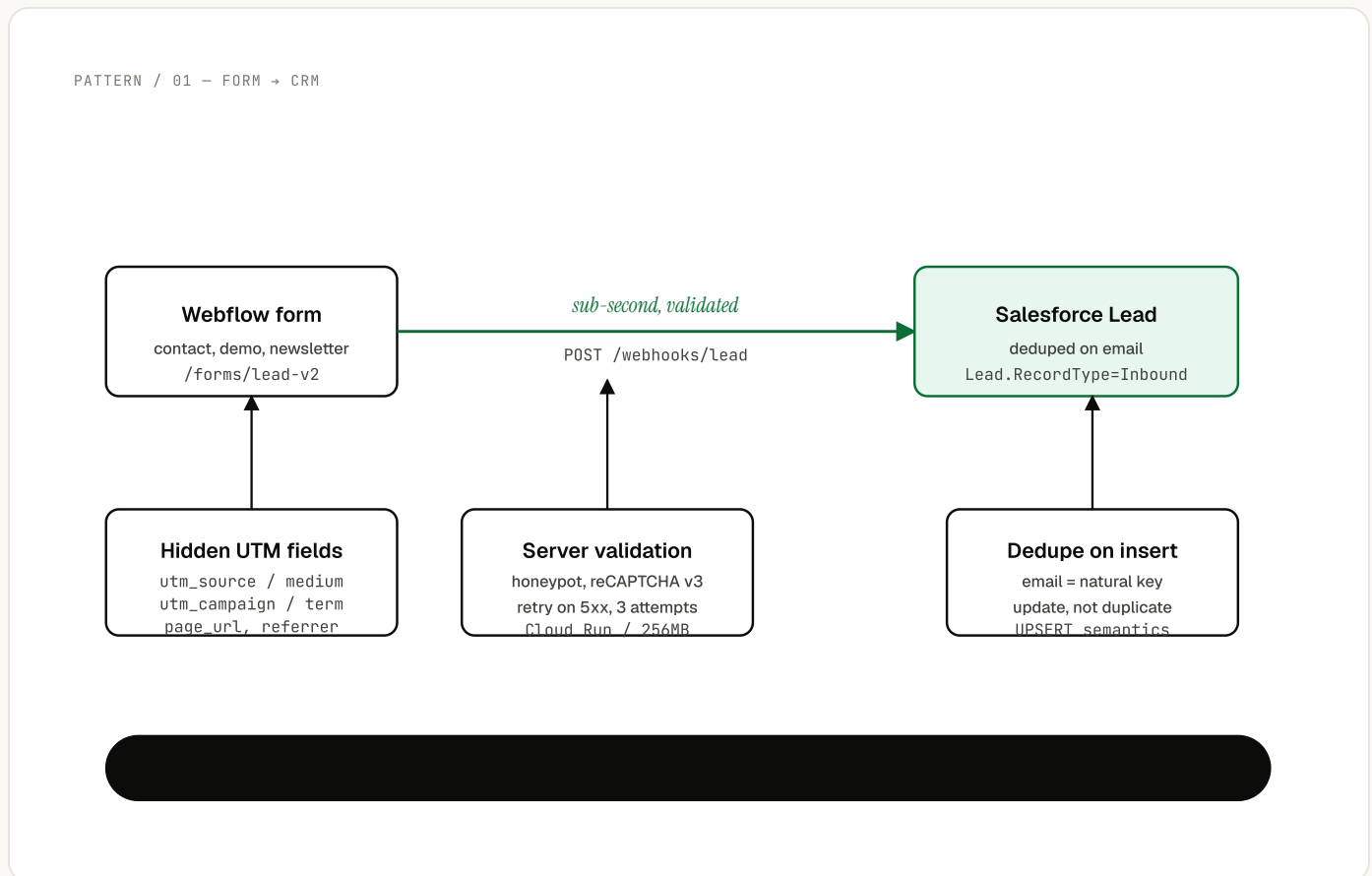
# Modern martech *stack* *diagrams.*

The signal-path diagrams we draw on every kickoff. Five canonical patterns — form to CRM, GTM to ad platforms, Segment to lifecycle, closed-won back to ad spend, edge in front of everything.

PATTERN 01 · FORM → CRM

# Form to CRM, *deduped on insert.*

Webflow form on the left, Salesforce on the right, three branches keeping it honest in the middle. UTM capture, server-side validation, dedupe on email.



### The path

Browser submits to a Cloud Run endpoint, not directly to Salesforce. Validate, enrich, then upsert.

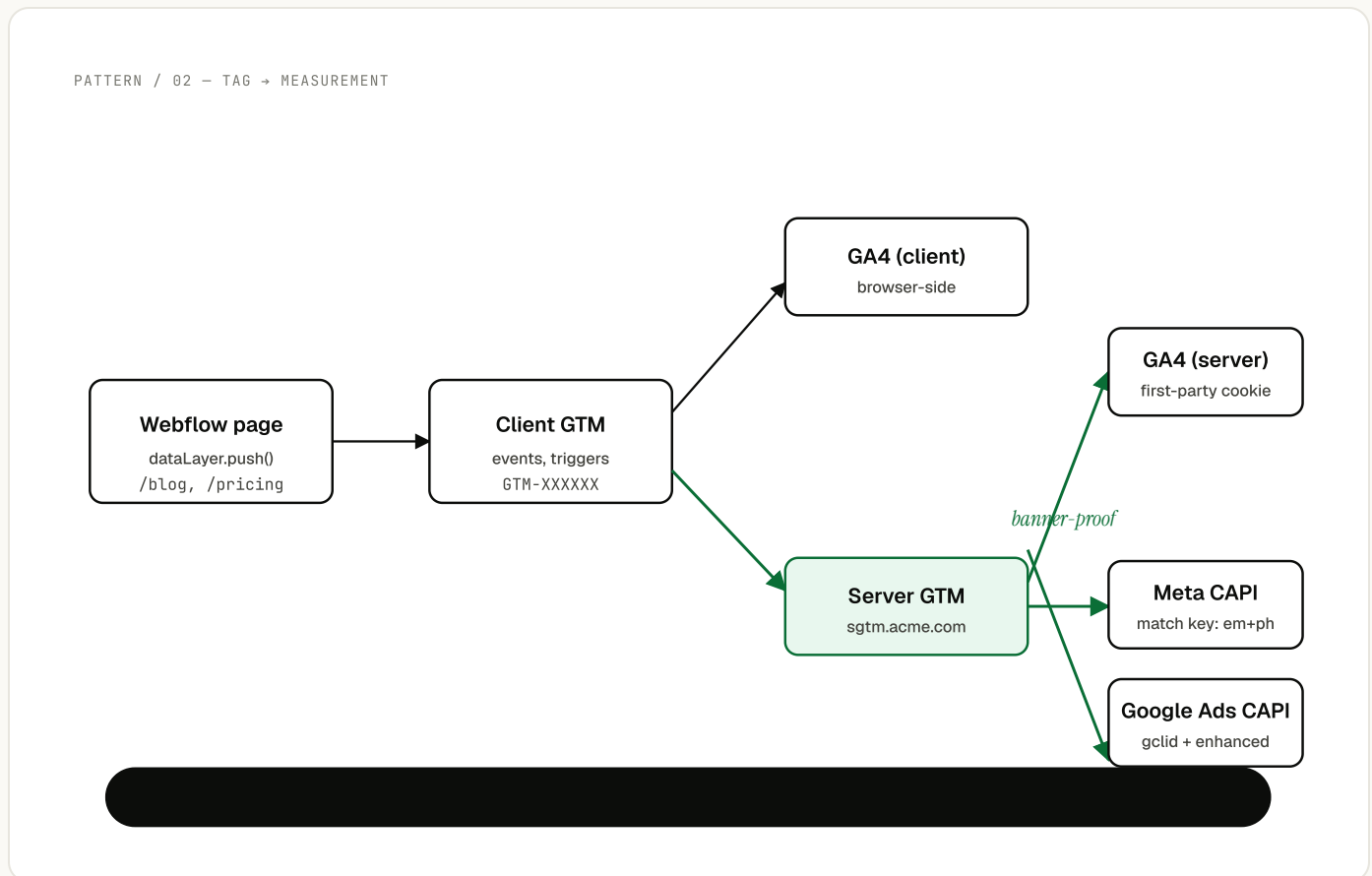
### What this gives you

Retry on 5xx. UTM persistence across page visits. One row per lead, ever — no duplicates after the first month.

PATTERN 02 · TAG → MEASUREMENT

# Tag to measurement, *banner-proof*.

Web GTM in the browser, server GTM on a subdomain you own. The server path is what survives ad-blockers, ITP, and the next round of cookie rules.



### The split

Web container does what needs `document`. Server container does what needs durability. Both fed from the same dataLayer.

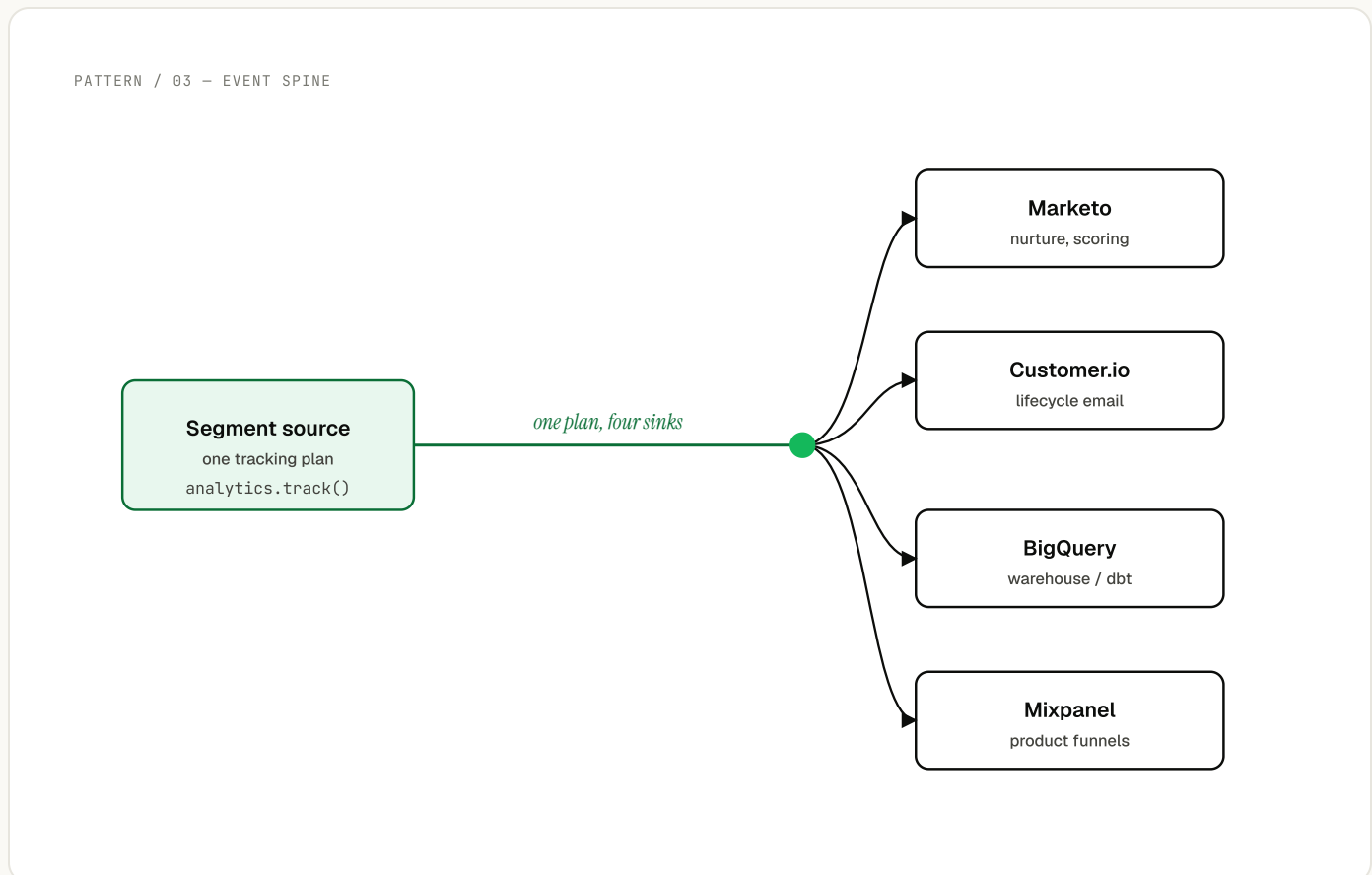
### Cookie life

Server-side first-party `_ga` lives the full 2 years. Client-side gets capped at 7 days on Safari, 24 hours on Firefox in some configs.

## PATTERN 03 · EVENT SPINE

# One tracking plan, *four sinks*.

Segment as the spine. Define an event once, send it everywhere. The tracking plan is the contract; the destinations enforce it.



## Why the spine

If marketing, lifecycle, warehouse, and product analytics each define their own events, you have four versions of "Signed Up". With a spine, one.

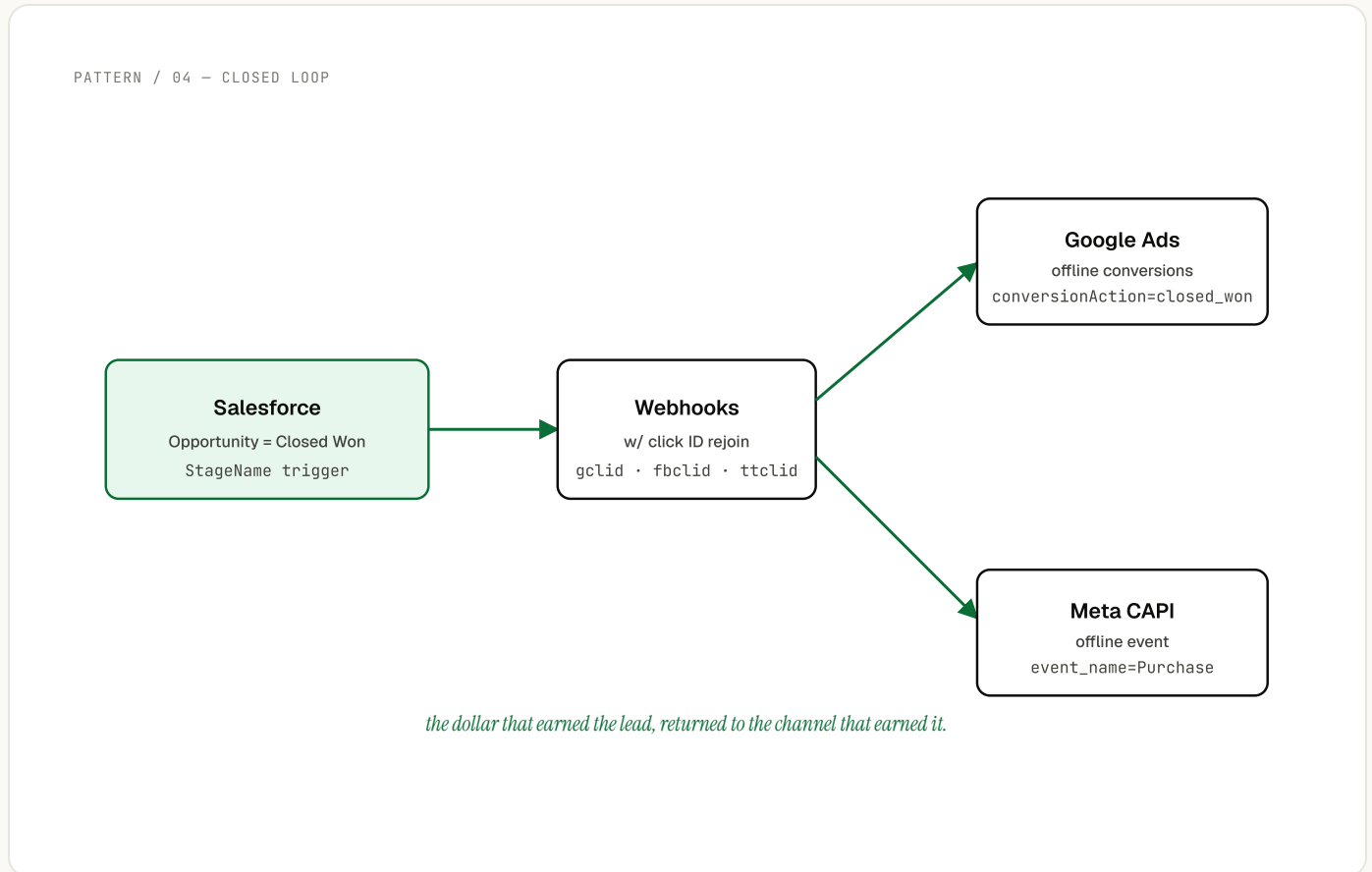
## The contract

The tracking plan is a YAML file in the repo. Events are typed. PRs reject schema drift. Engineers ship features; the plan stays clean.

PATTERN 04 · CLOSED LOOP

# Closed-loop attribution, *CRM back to ads.*

When a deal closes in Salesforce, the value flows back to the platforms that earned it. Offline conversions in Google Ads, offline events in Meta. Bid algorithms learn.



### The click ID rejoin

Capture `gclid` / `fbclid` / `ttclid` on lead create.  
Store on the contact record. Re-attach on close.

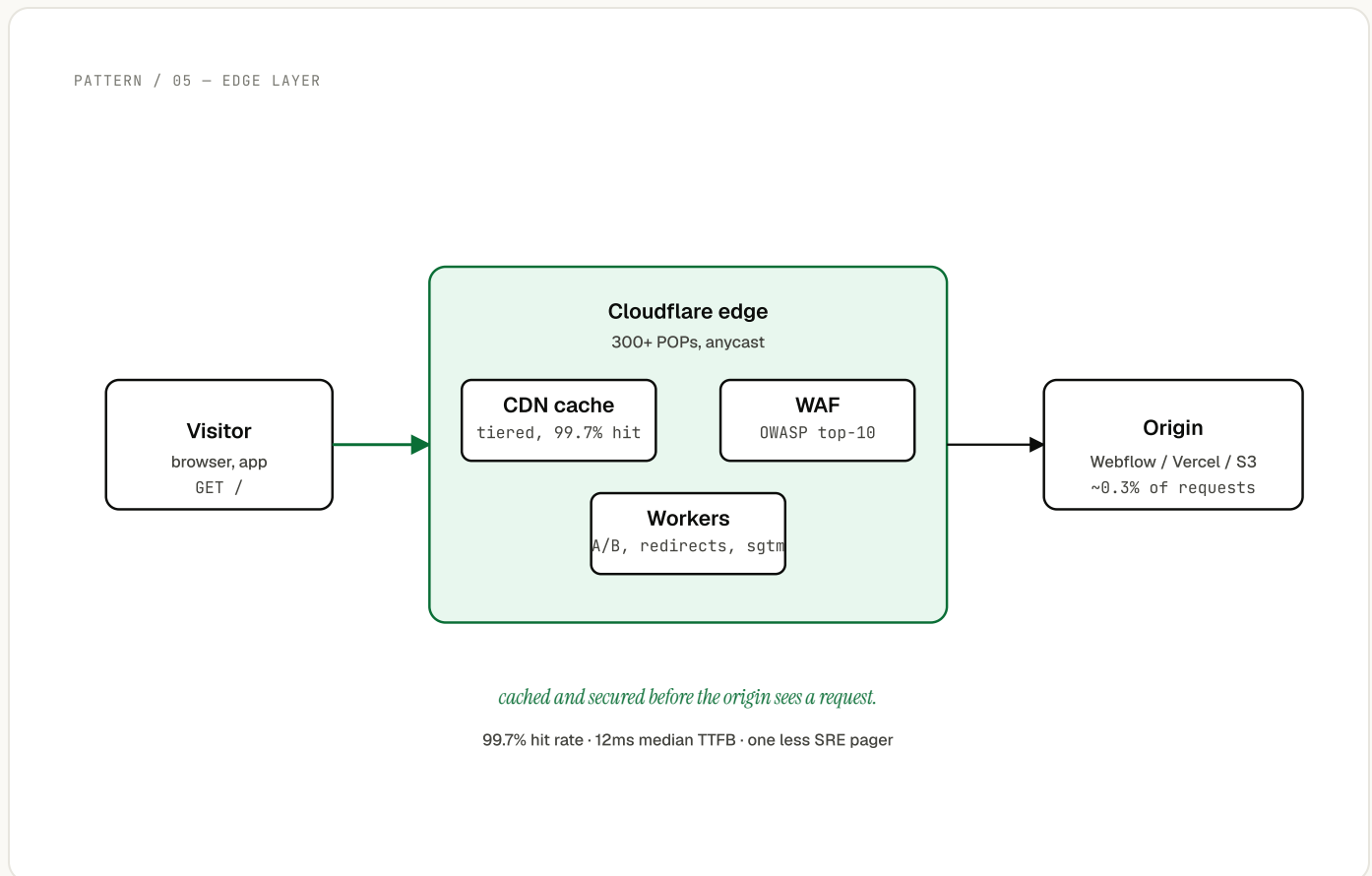
### Why it matters

Most B2B advertisers optimize for leads. Lead volume is easy; lead quality is what the bid algorithm needs. Closed-won is the only ground truth.

PATTERN 05 · EDGE LAYER

# Edge layer, *cached and secured.*

Cloudflare in front of everything. CDN, WAF, Workers. The origin handles ~0.3% of requests on a steady-state site.



### What lives at the edge

Static assets, A/B test routing, redirect rules, sgtm if you run server GTM through Workers instead of Cloud Run.

### What stays at origin

Authenticated views, anything personalized, anything writing to the database. Everything else, edge.

## SECTION 06 · NEXT

# Useful as a kickoff artifact. *Useful at month nine.*

Print these. Mark them up in a kickoff. Re-print them at month nine to find the drift. If you'd rather we run the exercise on your stack, we keep half a day a week for it.

## 01 · Edit

Figma file with each diagram as a frame. We share on request.

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## 02 · Map

Replace box labels with your tools. Where the line dies is where the integration is brittle.

## 03 · Annotate

Mark every line: what's flowing, how often, who owns it. The unowned lines are the bugs.

## Want us to draw yours?

Two-hour working session over Zoom. We leave you with a Figma file and a triaged list of three to seven gaps.

[Book a working session →](#)

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