

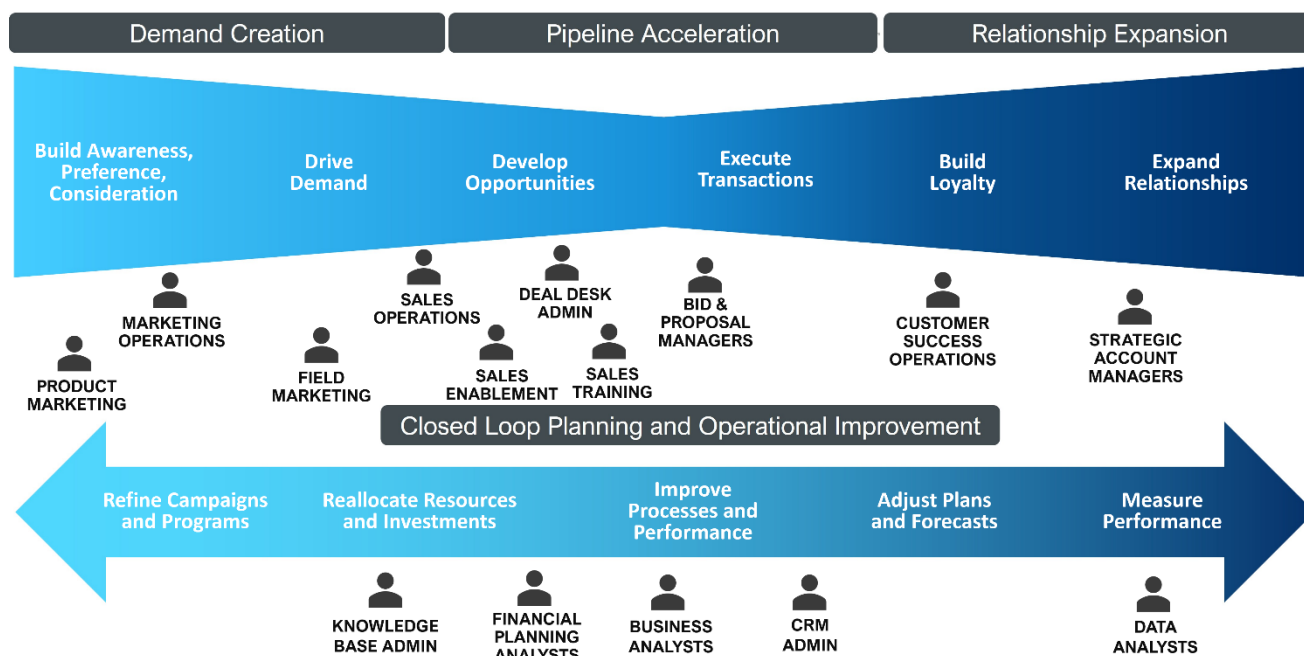


REVENUE **OPERATIONS**

**A BLUEPRINT TO DEFINE THE ROLE
OF REVENUE OPERATIONS IN A
MODERN GO-TO-MARKET MODEL**

A MATURITY MODEL TO GUIDE THE DEFINITION,
EVOLUTION AND CAPABILITIES OF THE REVENUE
OPERATIONS ROLE IN YOUR BUSINESS

I. THE GROWING ROLE OF REVENUE OPERATIONS IN THE GO-TO-MARKET MODEL



THE EVOLUTION AND CONSOLIDATION OF THE OPERATIONS THAT SUPPORT THE REVENUE CYCLE TO DRIVE SCALABLE AND SUSTAINABLE GROWTH

Revenue Operations has emerged as one of the fastest growing jobs in the US right now according to jobs analysis by Linked In. But a quick Google search will tell you nobody really agrees on what Revenue Operations is. Few can define it.

Our analysis of hundreds of RevOps job descriptions, and discussions with over seventy executives who carry the Revenue Operations moniker in their title – it’s pretty clear that no one job description is the same. Rather, Revenue Operations describes a conflation of a dozen or more historically fragmented functions and roles – Sales Operations, Sales Enablement, Marketing Operations, Customer Analytics, as well as Training and Development.

At the highest level, the primary goal of a Revenue Operations leader is to unify and align the operations, systems, and data that support revenue teams along the entire revenue cycle to generate more consistent and scalable growth. That’s important because growing a business in 2026 is a digital, data-driven, and technology enabled team sport. B2B growth leaders are driving a machine that uses customer data as gasoline, selling content as oxygen, and digital technology to get traction with customers. The assets that support this growth machine – customer data, digital selling infrastructure, and brands – are the largest financial assets on the company balance sheet.

On a practical level, running this growth machine using traditional marketing, sales, customer service, product, IT and finance functions is like driving an expensive racing car that is only firing on two cylinders, gets terrible gas mileage, and needs a wheel alignment. Customers won’t suffer the bumps and bruises of being passed from disconnected marketing, sales, and customer success teams as they move along the revenue cycle. And investors won’t stand for high selling costs, leaky revenue forecasts, and untapped customer expansion potential for long.

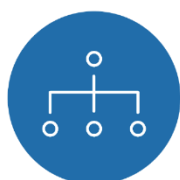
That’s the primary reason why 90% of organizations are actively changing the way they lead and align revenue teams and the operations that support them according to research in the book Revenue Operations. The lines between these functional teams have blurred. And the systems and data that support them are becoming increasingly connected. The difference between the marketing and sales technology stack are disappearing. First party customer data from web sites needs to be merged with account data in CRM and customer inquiries from Customer Success. And the entire notion of a sales transaction has changed as businesses go from selling individual widgets to streams of consumable services and subscriptions. “We don’t really talk in sales and marketing at our company,” says Jenna Pipchuk, the EVP in Chief Sales Officer of Smart Technologies. “We really talk about

the Unified Commercial Engine which is all the people, channels and the entire revenue stack that supports the revenue cycle. And we work together on that.”

This has spawned the Revenue Operations job function – a next generation operations leader with a mandate to orchestrate sales, marketing, and service teams – and align the operations, systems, data and processes that support revenue teams to get better control over the end-to-end revenue cycle. To achieve that level of alignment, leading companies are redesigning the role of operations that support the revenue cycle to create Revenue Operations roles that have an expanded scope and mandate to accelerate revenues. Large enterprises like Juniper Networks, Pure Storage, Conga, Affirm, and Schneider Electric are introducing expanded Revenue Operations roles that have a broader scope and a remit to better manage commercial assets, the operations and enablement infrastructure, and the customer journey across the enterprise. Some organizations are folding all of the operations and systems that support the revenue cycle under one operations leader. For example, Affirm has put in place a Revenue Operations VP reporting to the Chief Commercial Officer, who has analytics, sales enablement, program management, field operations, selling systems and tools, and incentive compensation as direct reports. Others have expanded the remit of an existing operations function, as in the case of Conga, which added Sales Operations, Field Operations, Deal Desk, and Order Operations under the purview of Marketing Operations leader, as part of a RevOps Transformation initiative. “The Revenue Operations moniker reflects the changing strategic priorities, business operation realignment, and new tasks and responsibilities that the company did not have before,” says Kim Whitler, Professor of Marketing at The Darden School of Business who has studied the emergence of the Chief Revenue Officer and Chief Growth Officer. “For example, in many cases we are seeing marketers are being asked to take on a bigger role in supporting development, activation and expansion capabilities and take on a broader role in analytics and accountability as part of a Revenue Operations strategy.”

Our analysis of RevOps job descriptions found the Revenue Operations job function is a moving target. The role is constantly evolving as organizations consolidate the operations and systems that support the revenue cycle. “Revenue operations is the future evolution of sales operations,” says Mary Lee, Senior Director, Business Operations at Lionbridge, who manages CRM, analytics, financial reporting and advanced analytics in her role. “The industry is moving on a journey along a continuum from sales operations to revenue operations. Sales operations wasn’t even a function 15 years ago. It started as reporting. It expanded into technology with the administration of CRM. Then we had to connect selling measurements to financial measurements. Then we had to integrate marketing technology with sales technology. Then we had to change the behavior of the sales team. And we have to motivate them with incentives and quotas. The role keeps getting bigger and bigger.”

THE FIVE CORE DISCIPLINES OF THE REVENUE OPERATIONS ROLE



**COMMERCIAL
OPERATIONS**



**COMMERCIAL
ARCHITECTURE**



**COMMERCIAL
INSIGHTS**



**COMMERCIAL
ENABLEMENT**



**COMMERCIAL ASSET
MANAGEMENT**

But while job titles and the specifics of the role will vary over time with the maturity of organizations, the destination is clear. All of the roles we evaluated draw from 5 core disciplines. These five disciplines reflect the convergence and evolution of the traditional functions that support the revenue cycle. They combine in ways that can grow customer lifetime value, maximize the return on growth assets, and accelerate revenues.

1. **Commercial Operations:** This involves aligning the operations that support growth programs and enable human sellers along the entire revenue cycle and providing coherent management of all of the systems, assets, content, and digital selling infrastructure that support revenue teams. For example, the imperative to align data and processes along the revenue cycle is leading to the inevitable consolidation of the marketing and sales operations functions, according to Chris Thompson, VP of Global Marketing Operations at Conga. “What is the difference between Marketing Operations and Sales Operations? – in two years there will not be one,” says Thompson.
2. **Commercial Architecture:** This includes redesigning and optimizing elements of the commercial architecture to maximize coverage, control, and the return on selling assets by improving the speed, visibility, productivity, and engagement of front line selling teams and reducing cost to sell. This is important because using advanced analytics to challenge and optimize the

long standing assumptions about sales force emphasis, roles, workloads, selling costs, and the mix, nature, and cadence of engagement needed to convert prospects to customers offers the potential to double the performance of front line sellers.

3. **Commercial Insights:** This involves using advanced analytics to turn customer engagement data into commercial insights that inform selling priorities, decisions, actions, and conversations and optimize the allocation and return on growth resources, assets and effort. “In my role, I have unprecedented access to revenue intelligence because I manage all of the primary operations that support the revenue cycle - sales enablement, sales operations, analytics,” says Haley Katsman the VP of Revenue Strategy at Highspot. “This gives me access to powerful customer engagement and interaction data that can help us better manage revenue growth by enriching our measurement and making our revenue forecasts more precise, reliable and reflective of the current situation on the ground.”
4. **Commercial Enablement:** This includes building commercial capabilities that enable, develop and retain front line revenue teams and maximize their contribution to expanding customer lifetime value at every stage of the revenue cycle. A key aspect of the job is to coordinate, connect and align the sales and marketing systems that support the revenue cycle including marketing automation, CRM software, sales enablement, sales engagement, and customer success management platforms. 75% of organizations are tasking their sales enablement and operations team to re-configure their commercial enablement technology investments with an eye for simplifying the seller workflow, improving the quality of engagement and reducing administrative costs.
5. **Commercial Asset Management:** This is the strategic management and monetization of the commercial technology, data, and digital selling channel assets to maximize their utilization, financial returns and revenue impact. This is important because the average organization has over 25 tools and services that support the revenue team. Usually these are spread over a dozen different organizations. Capital and operating investment in this growing commercial tool portfolio is expected to exceed \$10,000 per front line seller at high growth organizations. “To better manage revenues in a single interconnected revenue process, we’re trying to bring data from multiple sources to the forefront and are working more cross-functionally across our different operations organizations that support the revenue cycle,” says Steve Gordon, the VP of Global Sales Operations at Pure Storage. “I can’t have the marketing view of the revenue pipeline and the sales view and a finance view - all based on different data sets. I need to have one view of pipeline. So we’re bringing that organization together to centralize those different data sets so that everybody is operating off a single source of truth.”

To get more specific, the capabilities and remits underlying these five core Revenue Operations disciplines expand into fifteen discrete job responsibilities. These capabilities and roles are detailed in greater depth in the 36-point Revenue Operations Maturity Model in this report. Plotting these capabilities over time is important because it maps the evolution of the Revenue Operations function. This lets business leaders assess the state of their commercial transformation and identify the most financially viable way to “stairstep” their organizations towards greater alignment of sales, marketing and customer success teams, assets, systems, and processes.

To better define the Revenue Operations role in the modern GTM model, Revenue Operations Associates engaged hundreds of business leaders, as well as the leading academics and experts in the field. This report analyses the five core disciplines that underlie the Revenue Operations role, the 12 capabilities that go into the job description, and a comprehensive 36 point Revenue Operations maturity model to help business leader quickly assess the state of their commercial transformation and identify the most financially viable way to “stairstep” your organization towards greater alignment of sales, marketing and CX teams, systems, and processes.

Regardless of the title, establishing a leader with a mandate to unify and coordinate sales, marketing and service operations into a high-octane growth machine will be essential to growing a business in the next decade. “Titles, remits, and job scopes will vary company to company, but the challenge of getting sales, marketing and customer success systems, operations, and processes working together will not disappear based on nomenclature,” forecasts Greg Munster of the Revenue Enablement Institute, who has led business transformation initiatives to drive revenue optimization and customer success at IBM, Lenovo, Red Hat, and Canonical. “Revenue Operations is now essential to any growth discipline.” “Revenue Operations is an essential career roadmap for those who have made growth their cornerstone objective,” echoes Bob Liodice, the CEO of the Association of National Advertisers. David Reibstein, Professor of Marketing at the Wharton School of Business points out that Revenue Operations addresses the real world problem that growing a business is fundamentally interdisciplinary in nature – by providing clear roles, structures, skills and systems leaders can use to manage, coordinate and align many disciplines coherently around the customer. The Revenue Operations role has become a “farm system” for CROs because they have the data management, technical, and financial skills required to manage the modern commercial model, according to Warren Zenna, the founder of the CRO Collective. In operations, it has been a career path and a ticket to the C suite. “Revenue operations is a critical issue for me,” says Mary Lee of Lionbridge who has a front line operations role. “It’s my career path.”

THE REVENUE OPERATIONS JOB DESCRIPTION

A BLUEPRINT FOR ALIGNING SALES, MARKETING AND CUSTOMER SUCCESS TEAMS TO OPTIMIZE GTM PERFORMANCE AND MAXIMIZE REVENUE GROWTH



DIMENSION	DEFINITION	CORE COMPETENCIES
 COMMERCIAL OPERATIONS	Aligning the operations that support growth programs and enable human sellers along the entire revenue cycle and providing coherent management of all of the systems, assets, content, and digital selling infrastructure that support revenue teams	1.0 Sales and Marketing Operations. Planning, supporting, consolidating, and measuring sales and marketing programs and the processes and systems that support them
		2.0 Commercial Process Management. Establish, measure, and optimize an enterprise commercial process that spans the entire revenue cycle and spans the marketing, sales and customer success functions
		3.0 Forecasting and Reporting. Reporting pipeline performance reports and developing the sales opportunity, revenue and financial forecasts with finance
 COMMERCIAL ARCHITECTURE	Redesigning the commercial architecture to maximize coverage, control, and the return on selling assets by improving the speed, visibility, productivity, and engagement of front line selling teams and reducing cost to sell.	4.0 Go to Market Architecture Redesign the go-to-market strategy and sales force design to improve performance, engagement, costs and the customer experience
		5.0 Planning and Resource Allocation. Optimize the allocation of growth budgets, resources, and investments and support integrated growth planning with finance
 COMMERCIAL INSIGHTS	Using advanced analytics to turn customer engagement data into commercial insights that inform selling priorities, decisions, actions, and conversations and optimize the allocation and return on growth resources, assets and effort.	6.0 Data Driven Selling. Analyze data from across departments to better inform customer targeting and prioritization, guided selling and coaching, and personalization at scale
		7.0 Performance Measurement. Establish fact-based reporting analytics and KPIs to measure commercial performance and inform the allocation of growth investment, resources and effort.
 COMMERCIAL ENABLEMENT	Building a common core of commercial capabilities that enable, develop and retain front line revenue teams and maximize their contribution to revenue and profit growth and expanding customer lifetime value at every stage of the revenue cycle	8.0 Sales Enablement and Engagement. The design, deployment, integration and management of systems to simplify the day to day selling workflow and enhance revenue team engagement.
		9.0 Sales Training and Development. Design, deploy, integrate and manage to better support sales readiness, training, and development
		10.0 Quote to Cash Operations. Design, deploy, integrate and manage to enhance the lead-to-cash cycle and capture more revenue, margin, and price.
 COMMERCIAL ASSET MANAGEMENT	The strategic management and monetization of the commercial data and technology assets to maximize their utilization, impact, and financial returns and accelerate revenue growth	11.0 Commercial Technology Portfolio Management. The centralized stewardship and reconfiguration of the commercial technology portfolio across functions and every stage of the revenue cycle
		12.0 Customer Data Asset Management. The centralized stewardship of CRM data and establish a common architecture and operating system to consolidate, enhance, curate and monetize customer data assets

TABLE OF CONTENTS

I. THE EVOLUTION OF THE OPERATIONS THAT SUPPORT THE REVENUE CYCLE AND DRIVE GROWTH	2
II. TABLE OF CONTENTS.....	6
III. THE BUSINESS CASE FOR REVENUE OPERATIONS	
1. What is Revenue Operations?.....	7
2. How Revenue Operations Creates Value.....	12
3. The Emergence of the Revenue Operations Function.....	15
IV. A BLUEPRINT FOR THE REVENUE OPERATIONS JOB FUNCTION	
1. The Five Core Disciplines of a Revenue Operations Job.....	19
2. The Fifteen Functional Domains That Make Up Revenue Operations.....	23
V. A MATURITY MODEL TO GUIDE THE DEFINITION AND EVOLUTION OF THE REVENUE OPERATIONS JOB FUNCTION IN YOUR BUSINESS	
1. The Evolution and Convergence of RevOps Roles.....	35
2. A Maturity Model to Guide the Definition and Evolution of the Revenue Operations Job Function.....	36
1. Commercial Operations: Aligning Sales, Marketing and Customer Success Operations and Teams.....	38
2. Commercial Architecture: Redeploying to Improve Coverage, Control & Customer Experience at Lower Cost....	44
3. Commercial Insights: Turning Big Data into Actionable Insights That Create Value and Visibility in Real Time	49
4. Commercial Enablement: Turning Technology into a Force Multiplier that Simplifies and Speeds Selling.....	54
5. Commercial Asset Management: Greater Accountability and Financial Returns on Growth Assets.....	60
VI. ABOUT THIS RESEARCH.....	66
VII. CITATIONS.....	67
VIII. ABOUT REVENUE OPERATIONS ASSOCIATES.....	71

III. THE BUSINESS CASE FOR REVENUE OPERATIONS



What is Revenue Operations?

Over the last forty years, growing a business has evolved to become a capital intensive, digital, and data-driven team sport. In that time the weight of sales and marketing investment has shifted from media and field sales to owned digital channels and the systems, data, and processes that support them. Today, we have reached a tipping point where growing a business is so capital intensive and interdisciplinary it has broken the back of traditional models for managing the customer cycle and the teams, operations, systems and commercial assets that support it.

The emergence of complex technology enabled selling systems – amplified by the wholesale business model transformation and changing customer buying behavior in B2B businesses – have changed the basis for generating revenue growth in the past 30 years. The forces behind this change are fundamental.

- **Changing buyer behavior** is putting pressure on sellers to deliver a superior customer experience in the “moments that matter” in the customer journey. Digitally enabled customers armed with better information and access are putting a premium on speed, agility, personalized customer experience, and channel integration. This has created pressure on organizations to better manage the cross functional commercial process across the enterprise and coordinate the revenue teams, management systems, metrics, and platforms to ensure a unified customer experience as the primary performance goal.
- **Business model transformation to the cloud** - is driving greater focus on growing customer equity and lifetime value as a driver of firm value and has made selling a team sport. Organizations transitioning to or scaling a cloud, XaaS, or subscription revenues are being forced to align their sales, marketing, customer experience and support services teams to find ways to work together collectively as one revenue team.

- **The emergence of complex commercial technology ecosystems** - The scale and complexity of the commercial technology ecosystems that support revenue teams have grown to represent a large component of growth investment mix and sales and marketing operations overhead. The average enterprise has invested in over 25 selling tools.³⁶ Smaller cloud based businesses use over 30 on average.²⁶ These commercial systems are generating huge amounts of valuable customer engagement, seller activity, product telemetry and performance data. And businesses are investing over 10% of their marketing budgets on advanced analytics budgets to find ways to monetize that data. This is putting pressure on leaders to rationalize, streamline, connect and monetize the growth technology portfolio to generate greater financial returns from these commercial assets and to better enable scalable and predictable growth.

EXHIBIT 1: SIX TRENDS DRIVING THE EMERGENCE OF REVENUE OPERATIONS

	THE EMERGENCE OF ECOSYSTEMS THAT CONNECT TECHNOLOGY ASSETS TO VALUE	A new generation of leaders - CXOs - will accelerate growth and create financial value by knitting together functional and technology ecosystems to unify sales, marketing and service and reimagine the technology stack to enable high-performing revenue teams.
	THE PIVOT TO 4D CHANNELS ACCELERATES CHANGE	A massive shift to remote work and self-directed buying has created a tipping point for sales transformation and transform the sales and marketing mix – shifting budgets to digital, data-driven, and measurable channels and accelerate digital transformation of sales.
	BUSINESS MODEL TRANSFORMATION DRIVES GREATER FOCUS ON THE CUSTOMER	As businesses transform some or all of their sales to a subscription, SaaS and cloud based business model it dramatically increases the importance of recurring revenues, the customer experience and customer lifetime value as a focus of the revenue team.
	BUYING BEHAVIOR PUTS PRESSURE ON SELLERS TO DELIVER IN THE MOMENTS THAT MATTER	Changing customer behavior has reached a tipping point as “new school” buying behavior forces organizations to transform “old school” selling models to meet higher customer expectations for faster cadence, complete answers, digital channel engagement, and relevant content.
	GREATER ACCOUNTABILITY FOR FINANCIAL RETURNS ON COMMERCIAL ASSETS	Increased pressure to prove the contribution of growth assets to firm financial performance will fundamentally change how growth resources/assets are allocated, organized, funded, and measured and focus technology strategies on improving returns on the growth technology stack.
	A REVOLUTION IN AI AND ADVANCED ANALYTICS	A revolution in analytics and AI-led innovation - fueled by rich new sales engagement data sources, increased investment, leadership focus, and the broader adoption of data-driven selling approaches will become the primary driver of value creation in sales and the key to increasing the return on selling assets in the next decade.

- **A revolution in advanced sales analytics and artificial intelligence** - fueled by rich new customer engagement and seller activity data sources and increased investment - are making data-driven selling, information velocity, speed of engagement, and visibility into pipeline, account and opportunity potential increasingly determine selling effectiveness the primary drivers of growth, competitive advantage, and value creation in the new market reality.
- **Greater accountability for financial returns on commercial assets and investments** - Growth leaders - CMOs, CROs and Chief Commercial Officers - are under growing pressure to prove the contribution of growth investments and

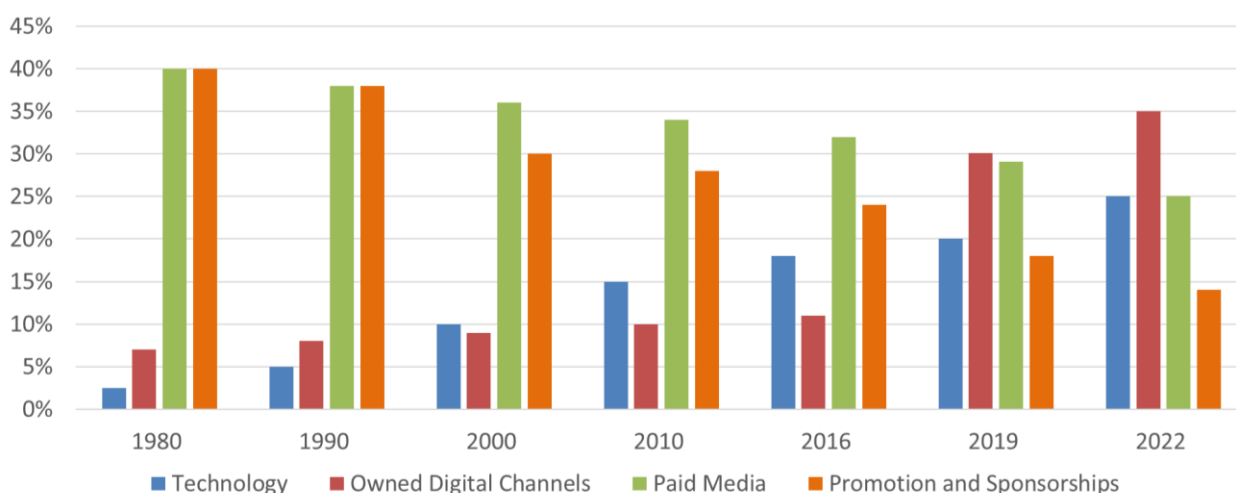
commercial assets to firm financial performance. This focus on increased financial accountability is fundamentally changing how commercial resources and assets are allocated, organized, funded, measured, and deployed.

- **The pivot to “4D” channels is transforming the commercial architecture.** Massive shifts in self-directed buying and work from anywhere practices has created digital, data-driven, dynamic and distributed selling teams. This has dramatically changed the economics of field sales. This has significantly altered long standing assumptions about sales force emphasis, roles, workloads, selling costs, and the mix, nature, and cadence of engagement needed to convert prospects to customers. This broad adoption of “4D” selling networks has transformed the go-to-market approach of almost every (97%) organization and offers the potential to double the speed, visibility, productivity and engagement of front line sellers.

The confluence of these trends - and the financial, performance and behavioral constraints they impose on sellers - has forced owners, CEOs and growth leaders to transform their commercial models and reconfigure their sales, technology, and growth assets. Selling in 2026 now requires greater coordination of the people, process, and technology of growth.

These dynamics have fundamentally reshaped the allocation of growth resources, operating budgets, and capital investment. Owned digital sales and marketing channels and the systems, data, content and operations that support them now command two thirds of operating budgets, displacing paid media and the overhead that supports field sales. The allocation of operating and capital funds towards growth has shifted dramatically from paid media and field sellers to technology enabled owned digital selling channels. This commands two thirds of operating budgets. (Exhibit 2). The average organization uses over 20 digitally enabled marketing, sales and service channels to engage prospects and customers over the revenue cycle. The systems, operations, data, and content required to run these modern selling machines has grown dramatically. And capital investment in the digital selling infrastructure, customer databases, and enabling technologies that support these digital channels and “4D” selling teams has created some of the biggest financial assets on the balance sheet. In some cases, the customer data within a business can be more valuable than the business itself.

EXHIBIT 2: THE EVOLUTION OF MARKETING BUDGET ALLOCATION



It has also created unprecedented cost and complexity for the executives leading the commercial model. In the last ten years, the size, complexity, and capital investment in the sales and marketing technology infrastructure that supports growth has grown dramatically. This ecosystem of growth assets now includes a large and growing set of thousands of sales infrastructure and customer-facing technology solutions (exceeding 10,000-point solutions and even more applications and algorithms) as well as dozens of customer touch points and data sources. Most organizations have invested in 25 or more technology tools to support selling and try to coordinate many digital selling channels, and struggle simplify and streamline the day-to-day selling workflow where front line sales reps. The cost of arming a front line customer facing employee has risen to over \$2,500 per rep when you count all the information, automation and digital channel capabilities they need to compete in the new market reality. As CFOs reallocate funds from travel and real estate to more scalable investments in technology and training, this number is on a trajectory to exceed \$10,000 of technology and related services per selling resource. Even at this level of enablement, this will bring sales and service reps closer to other highly automated job functions like warehouse, production, and finance workers—who have more technology investment behind them to make them productive.

The complexity of coordinating these channels and harnessing the data they generate is breaking the back of traditional marketing, sales and service silos. It has also forced the consolidation and coordination of many operating teams (marketing operations, sales operations, sales enablement, training and development, customer analytics) that support them. As a direct consequence, the return on selling assets – people, data, technology, and content – still falls below managers' expectations, and even further below their potential to create firm value by any financially valid measure.

Collectively, these forces have made the functional management of marketing, sales, support and fulfillment resources and the notion of a linear customer journey partitioned by function obsolete. Businesses that use functionally based organizational systems developed in the 20th century to manage a far more advanced and digital commercial model in the 21st Century will get sub optimal growth from their growth investments and commercial infrastructure. The financial consequences of this lack of alignment are significant and growing:

- The fragmented management of growth assets results in lower than acceptable returns on the technology, data and digital infrastructure assets that underpin firm value and future revenue streams.
- The fractured management of the enterprise commercial process causes revenue and margin to leak through “air gaps” and handoffs in the customer journey.
- The uncoordinated leadership of customer facing revenue teams leads to coverage gaps, suboptimal resource allocation, higher selling costs, customer churn, and missed opportunity.

On a practical level, a poorly managed commercial model is like an expensive racing car that does not drive very fast or far because it is only firing on two cylinders, gets terrible gas mileage, and needs a wheel alignment and a tune up.

The core problem is there is no established system for getting the many different channels, teams, technologies in the growth equation working together. Business leaders lack a management system for coordinating their growth teams, functions and disciplines. They lack an operating system for managing their growth assets, systems, and processes.

Something has to change. Until these fundamental issues are addressed, the potential of technology and AI to unlock consistent, profitable, and scalable growth will not be realized.

The solution to this problem is clear. There is a material move on the part of B2B organizations to better align sales, marketing, and customer support teams to sustain and accelerate growth in light of the forces and dynamics outlined above. The vocabulary most commonly used to describe this shift in commercial model focus is Revenue Operations (or RevOps for short).

A new system for growth is urgently needed. One that aligns revenue teams and the systems, operations, and processes that support them across the entire revenue cycle. And generates more growth from the expensive data, technology and channel assets that are the foundation of modern selling. We call that system for growth a Revenue Operations. In this report we explain what that system is, why it came to be, and describe the structure and evolution of the operations leader who will make that system work.

From a strategic perspective, Revenue Operations is a management system that aligns marketing, sales, and service teams - and the systems, operations and processes that support them – around the entire revenue cycle to unlock more predictable and scalable organic revenue growth. The majority of organizations are actively changing the way they lead and align revenue teams and the operations that support them according to Revenue Operations. Current research estimates universally report and project high levels of Revenue Operations adoption, particularly among smaller B2B organizations and technology businesses undergoing transformation to a recurring revenue model. For example, Forrester suggests over two thirds of organizations have deployed Revenue Operations – either partially (58%) or fully (an additional 10 - 15%).²¹ Gartner forecasts that 75% of the highest growth firms will have deployed a revenue operations model by 2025.¹⁷

From an execution standpoint Revenue Operations has emerged as a job function that orchestrates aspects of the operations, systems and analytics that support revenue teams to get better control over the end-to-end revenue cycle. Revenue Operations has emerged as the fastest growing job in the US right now according to jobs analysis by Linked In.

The discipline of RevOps can span more than a dozen titles – Marketing Ops, Sales Enablement, CRM Administration, Customer Success Operations or Deal Desk. But make no mistake, these unsung operations teams are increasingly the key to providing the insights, content, plans, targets, automation, and channels you need to grow. No other function is primarily motivated to connect the dots across functions and systems to generate the business outcomes that drive profitable growth and firm value. And if you want to have any chance of leveraging AI to multiply the efforts of your team, it's your RevOps team that controls the knowledgebases that fuel them, the customer facing channels and use cases to monetize AI, and the algorithms that drive those use cases.

“You can’t execute a modern Go-to-Market without Revenue Operations,” reinforces Steve Busby, the CEO of Revenue Operations Associates, a company that offers RevOps certification programs and GTM acceleration tools that help businesses unlock their GTM potential. “RevOps is emerging as the strategic discipline required to execute, accelerate a modern GTM strategy as growth becomes more data driven, digital and client driven. The expectation that AI will transform the GTM only amplifies the importance of the RevOps function and discipline.”

“Revenue Operations teams are full of very smart people who are brilliant in their own domain, such as marketing operations, sales training, territory and quota planning and CRM administration,” says Ashmi Pancholi, who has over a decade of experience leading RevOps teams at GE, Amazon, and Affirm. “What holds many revenue teams back is that the individual players on those teams don’t understand how those domains connect and work together to drive reliable, scalable and profitable growth,” adds Pancholi.

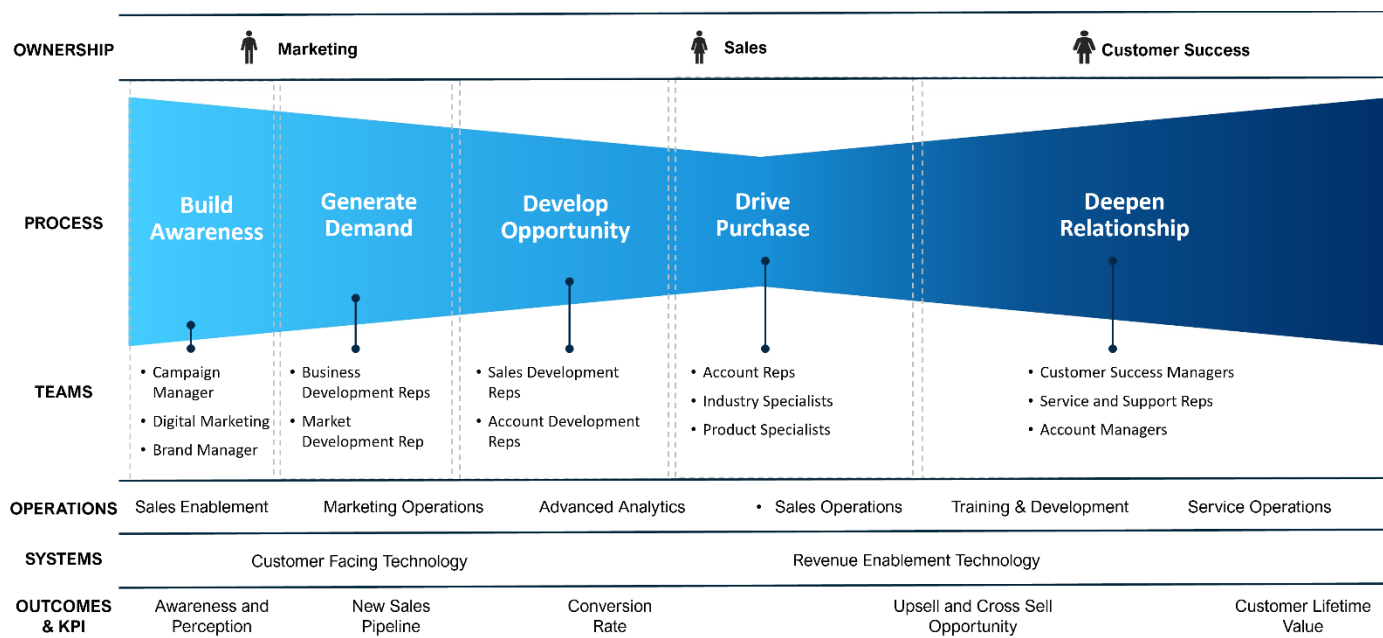
The problem is defining the Revenue Operations job description is like describing great art, writing, or music. Most people agree it’s a good thing, and everybody seems to know it when they see it, but few people can describe it. There are at least a dozen inconsistent definitions of Revenue Operations in written research. These range from a methodology to a strategy to a job function, software platform and organization design. Our analysis of hundreds of RevOps job descriptions, and discussions with over fifty executives who carry the Revenue Operations in their title – it’s pretty clear that no one job description is the same. Rather, revenue operations describes a conflation of a dozen or more historically fragmented functions and roles – sales operations, sales enablement, marketing operations, and training and development.

That may sound random. But that’s the fundamental point of Revenue Operations.

At the highest level, the primary goal of a Revenue Operations leader is to unify and align the operations, systems and data that support revenue teams along the entire revenue cycle to generate more consistent and scalable growth. That’s important because growing a business in 2026 is a digital, data-driven, and technology enabled team sport. B2B growth leaders are driving a machine that uses customer data as gasoline, selling content as oxygen, and digital technology to get traction with customers. The assets that support this growth machine – customer data, digital selling infrastructure, and brands – are the largest financial assets on the company balance sheet.

The goal of this analysis is to lay out a clear execution blueprint for the individuals who must make it a reality – the leader of Revenue Operations.

EXHIBIT 3: ALIGNING THE OPERATIONS, SYSTEMS, DATA AND PROCESSES THAT SUPPORT REVENUE TEAMS ALONG THE REVENUE CYCLE

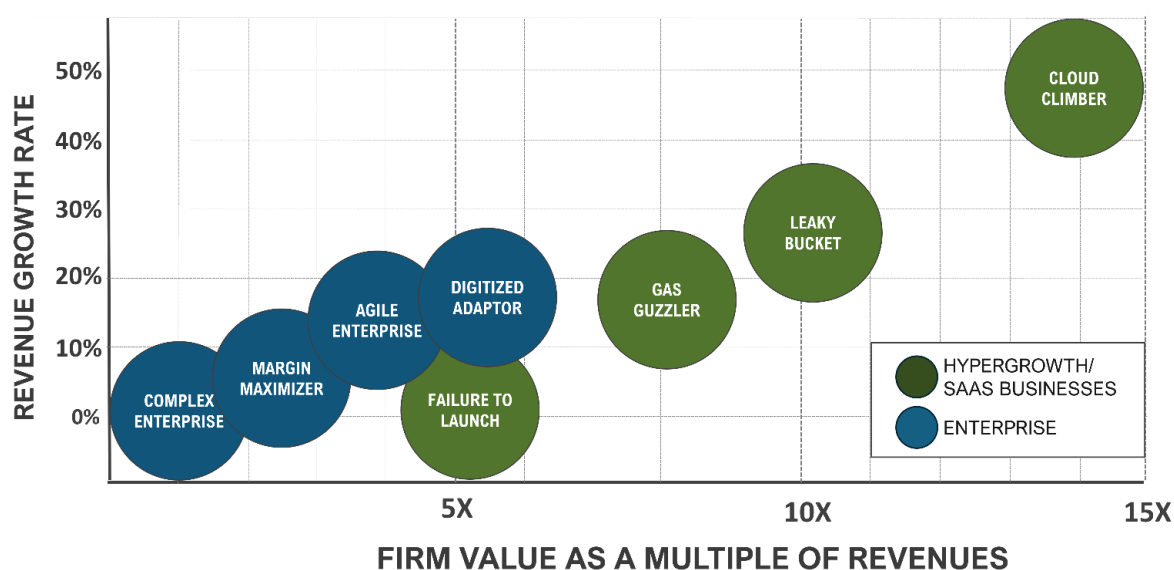


How Revenue Operations Creates Value

Revenue operations has emerged as a critical job function for a simple reason - it directly impacts the ability of an organization to protect its largest assets and grow firm value. This is because organic growth, and the commercial processes, channels, systems and assets that create it, have become essential to value creation.

For example, in the 21st century, the assets that support growth – customer relationship equity, brand preference, data and insights, process know-how, and digital channel infrastructure – are the most valuable items on the firm balance sheet. A number of commercial and academic research studies have documented that, when properly measured and accounted for, these intangible assets represent in excess of 80% of the value of a business.^{55, 56, 57} The ability of revenue teams to deploy these assets to grow future revenues and profits by building customer preference, conversion, loyalty, and usage while commanding price premiums are the primary drivers of firm value.

EXHIBIT 4: THE RELATIONSHIP BETWEEN REVENUE GROWTH AND FIRM VALUE FOR DIFFERENT COMMERCIAL ARCHETYPES



Source: Blue Ridge Partners, Pitchbook, Blossom Street Ventures, Dow Jones, Refinitive 2021, Inc 500, NASDAQ

The growing relationship between revenue growth and firm value can be seen in the high valuations awarded to businesses that can deliver predictable, scalable, and profitable growth or hyper growth (in the case of cloud businesses). For example, the marketplace values firms with hyper growth (over 40%) and predictable revenues (Annual Recurring Revenues) disproportionately. That is why a hyper growth business like HubSpot commands PE ratios in the hundreds while not yet showing a profit. It also explains why a pure play SaaS business like Salesforce.com – where the majority of revenues are recurring and revenue growth rates are in double digits – will have a valuation in excess of 60 times its earnings while the average business in the S&P 500 growing at 4% has historically generated 18 times its earnings.^{59, 62}

Revenue Operations can help any business to unlock more growth and value by improving their GTM execution and maximizing the return on their revenue teams, customer data, systems, channels, brand and customer relationship equity assets. In all there are forty drivers of revenue and GTM performance that can be better managed to unlock more growth from your existing business. Historically, these forty drivers have not been the focus of sales and marketing measurements. The discipline of RevOps as a holistic value creating role that allows leaders to optimize more of these growth levers in their businesses.

CEOs are waking up to the large opportunity to generate more revenue and profits from these commercial assets. That is a primary goal of the Revenue Operations function. In the broadest sense, the revenue operations leader is the steward of the large commercial assets in the business – including the revenue team, the commercial technology portfolio, the customer data they generate. When viewed through that lens, the job function makes a lot of financial sense.

From a people perspective, a wave of statistics by analysts, consultants and solutions providers strongly suggest moving to a Revenue Operations model will improve the performance and financial contribution of the revenue team. The majority of research indicates aligning the operational and customer facing teams in sales, marketing and customer support around a common workflow and goals will improve rep productivity, firm growth, and profitability in a variety of meaningful ways. These include:

- **Productivity:** Rep productivity gains ranging from 10 to 60%.^{26,47}
- **Growth:** Revenue growth improvements ranging from 19 to 31%.^{45,17,26}
- **Ramp:** The speed of ramping new sales reps of up to 60%.²³
- **Churn:** Reducing rep churn by 75% or more.²³

EIGHT REASONS WHY REVENUE OPERATIONS MATTERS

1. **Monetizing corporate assets.** Commercial assets – customer data, digital technology, digital channel infrastructure, customer relationship equity – are expensive and valuable intangible assets that make up a significant portion of the financial value of the firm and directly support scalable growth.
2. **Managing selling economics.** Improving the seller experience improves the economics of selling by simplifying and better supporting the day-to-day seller workflow. It is essential to ramping and retaining talent, reducing selling costs, scalable growth, and competitive differentiation.
3. **Differentiating the customer experience.** Optimizing the commercial process, revenue team incentives, and investments to better differentiate the customer experience is fundamental to selling in the new market reality.
4. **Executing scalable growth technologies.** More centralized management and stewardship of enterprise data, technology and content assets is essential to executing 1:1 personalization, coaching, response management and ABM capabilities at scale across the enterprise.
5. **Facilitating business model change.** Creating a common purpose across the revenue team to grow customer lifetime value is essential to enabling business model change to a subscription, SaaS, and recurring revenue model.
6. **Improving visibility and transparency.** Gaining access to real time commercial insights into account health, opportunity potential, seller and pipeline performance are now essential to managing the performance of digital, displaced, diverse and dynamic revenue teams.
7. **Motivating team selling.** All of the customer facing employees across the sales, marketing, and customer support teams need to be managed, measured, and incentivized as one revenue team focused on executing the corporate growth agenda and growing customer lifetime value.
8. **Enabling force multipliers.** Modern revenue teams have evolved to operate more like an army that relies on agile logistics and operational support infrastructure to be successful. One in four members of the revenue team are now in operations and enablement roles.

For example, growth leaders are quickly learning they are caretakers of what may be their company's most valuable asset: its customer data. For instance, customer data assets in the airline industry – which include revenue management, frequent flyer, and customer engagement databases - account at times for 100% or more of an airline's profitability and value. Yet they do not show up on any balance sheet or management report because these databases are regarded as "intangibles" - just like R&D, "process know how", and brand equity - by accountants and don't get measured, reported, and managed as closely as physical assets like inventory or real estate – even though they are far larger and more strategic. As evidence of this, both United Airlines and American Airlines recently secured multi-billion dollar loans by collateralizing their MileagePlus and AAdvantage customer loyalty programs, respectively. The third-party appraisals of their data suggest that it is worth two to three times more than the market value of the companies themselves. United's customer data was valued at \$20 billion while its market cap at the time was about \$9 billion. Similarly, American's data was valued at a minimum of \$19.5 billion and up to a jaw-dropping \$31.5 billion, whereas its own market cap was hovering at less than \$8 billion.

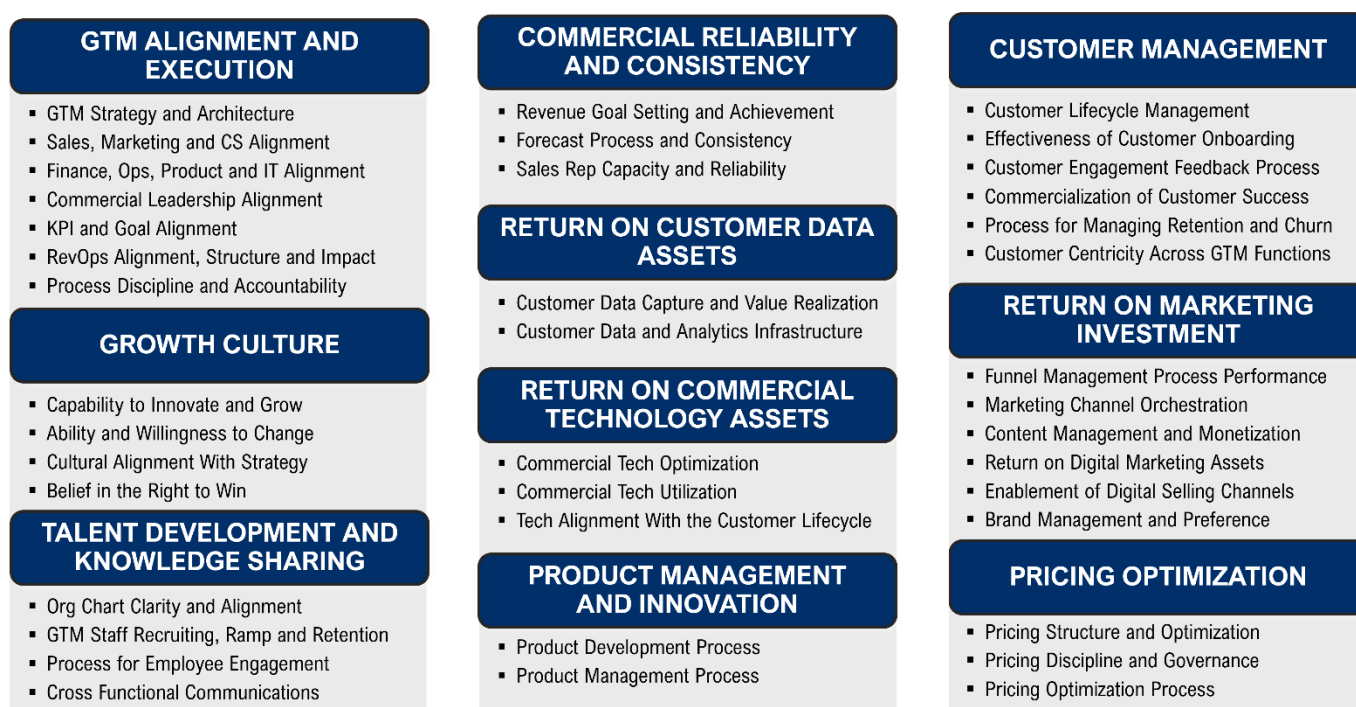
Academic and commercial research have made it clear that there is a causal relationship between organizational competence in analytics, marketing, information sharing, agility, and cross-functional collaboration with enterprise value. This [research](#) shows that a 10% increase in organizational competence will drive on average a 5.5% increase in stock price.⁷ An analysis of 380 CMOs by Forbes found that organizations investing in data-driven measurement processes, competencies and systems were achieving significantly higher levels of marketing effectiveness and business outcomes – achieving 5% better returns on marketing

investments and more than 7% higher levels of growth performance.⁷ The analysis revealed that these high-performing marketers – who were exceeding growth goals by over 25% – were significantly more data-driven in their approach to measuring, optimizing, and reallocating their offline and online sales and marketing investments.

Investments in customer insights and agility do create firm value. How fast and effectively an organization analyzes, leverages and shares information and customer data can increase tactical marketing returns but also generate long term enterprise value.⁶³ Academic research has proven there is a significant and casual relationship between how fast your organization shares data and customer insights across revenue teams and share price.⁶ A comprehensive analysis of 114 academic research studies by the Marketing Science Institute (MSI) has demonstrated that the ability of an organization to generate, disseminate and respond to market intelligence – called Organizational Knowledge Sharing – has a quantifiable positive effect on firm value and financial performance in terms of profits, sales, and market share.⁶

Similarly, customer relationships, go to market effectiveness, organizational information sharing, customer experience, and the quality of products, people and innovations have all been empirically proven to drive increases in firm value by academics.⁶

EXHIBIT 5: THE 40 DRIVERS OF REVENUE AND GTM PERFORMANCE



Source: Analysis of 100 Academic and Commercial Research Studies on Commercial Transformation, The GTM Accelerator Model Report, Revenue Operations Associates, 2025

In particular, the push to focus the organization on the customer and make building customer lifetime value the common purpose of the revenue team has a financial basis. Customer equity is a significant driver of share price. According to academic research the value elasticity of customer equity is 0.72.⁶ This means a 10% increase in the value of customer assets will drive a 7.2% increase in stock price because higher levels of customer satisfaction, trust and online service innovations enhance long term margins, sales growth, and enterprise value.^{6,7} This is because the lifetime value is being redefined as an economic model in a digitally driven economy. This is evidenced by the ability of businesses like AirBnb (\$92B in firm value with no profits) and the GHX Global Healthcare Exchange to convert digitally enabled consumer and business networks into valuable assets.⁵⁹

The Emergence of the Revenue Operations Function



For decades companies and boards struggled to match 20th century management roles against 21st century models of serving customers, new channels to market, and new sources of creating value for shareholders and customers. They learned over time that it is difficult to manage and enable unified revenue operations with traditional Marketing, Sales and Service leadership roles in place. These traditional functional structures with hierarchical command and control approaches are too slow, culturally toxic, and introduce too many points of leakage and failures as revenue opportunities move across functions.

A new generation of operations leaders is emerging in the enterprise with an expanded mandate to unify sales, marketing and customer success operations and make the commercial model more data-driven, digital, agile, and measurable, and bring new skills and perspectives to the executive suite and buyer decision-making process.

B2B organizations large and small are experimenting with new operations models that are intended to transform sales, marketing, and service in ways that accelerate growth and address the needs of digitally enabled customers. This has spawned the Revenue Operations job function – a next generation operations leader with a mandate to blend their sales, marketing, and service teams – and the systems, data, processes and content that support them - into a high-octane growth machine.

To achieve a high level of alignment across revenue teams, leading companies are redesigned the role of operations that support the revenue cycle to create Revenue Operations roles that have an expanded scope and mandate to accelerate revenues. Large enterprises like Juniper Networks, Pure Storage, Conga, Affirm, and Schneider Electric are introducing expanded Revenue Operations roles broader scope and a remit to better manage commercial assets, the operations and enablement infrastructure, and the customer journey across the enterprise.

Our analysis of hundreds of RevOps job descriptions, and discussions with over seventy executives who carry the Revenue Operations moniker in their title – it's pretty clear that no one job description is the same. Rather, Revenue Operations describes a conflation of a dozen or more historically fragmented functions and roles – Sales Operations, Sales Enablement, Marketing Operations, Customer Analytics, as well as Training and Development.

That may sound random. But that's the fundamental point of Revenue Operations.

At the highest level, the primary goal of a Revenue Operations leader is to unify and align the operations, systems, and data that support revenue teams along the entire revenue cycle to generate more consistent and scalable growth. That's important because growing a business in 2026 is a digital, data-driven, and technology enabled team sport. B2B growth leaders are driving a machine that uses customer data as gasoline, selling content as oxygen, and digital technology to get traction with customers. The assets that support this growth machine – customer data, digital selling infrastructure, and brands – are the largest financial assets on the company balance sheet.

But while job titles and the specifics of the role will vary over time with the maturity of organizations, the destination is clear. All of the roles we evaluated draw from 5 core disciplines. These five disciplines reflect the convergence and evolution of the

traditional functions that support the revenue cycle. They combine in ways that can grow customer lifetime value, maximize the return on growth assets, and accelerate revenues.

1. **Commercial Operations:** This involves aligning the operations that support growth programs and enable human sellers along the entire revenue cycle and providing coherent management of all of the systems, assets, content, and digital selling infrastructure that support revenue teams. For example, the imperative to align data and processes along the revenue cycle is leading to the inevitable consolidation of the marketing and sales operations functions, according to Chris Thompson, VP of Global Marketing Operations at Conga. “What is the difference between Marketing Operations and Sales Operations? – in two years there will not be one,” says Thompson. In the last year, Thompson’s job remit has expanded to include Sales Operations, Field Operations, Deal Desk, Order Operations, and Marketing Operations as part of a unified Go-to-Market Operations team reporting into the CRO.
2. **Commercial Architecture:** This includes redesigning and optimizing elements of the commercial architecture to maximize coverage, control, and the return on selling assets by improving the speed, visibility, productivity, and engagement of front line selling teams and reducing cost to sell. This is important because there are an infinite number of product, client, coverage, and effort scenarios that go into defining territory boundaries, sales quota assignments, and go to market programs for sales reps. Challenging and optimizing the long standing assumptions about sales force emphasis, roles, workloads, selling costs, and the mix, nature, and cadence of engagement needed to convert prospects to customers offers the potential to double the performance of front line sellers.
3. **Commercial Insights:** This involves using advanced analytics to turn customer engagement data into commercial insights that inform selling priorities, decisions, actions, and conversations and optimize the allocation and return on growth resources, assets and effort. “To better manage revenues in a single interconnected revenue process, we’re trying to bring data from multiple sources to the forefront and are working more cross-functionally across our different operations organizations that support the revenue cycle,” says Steve Gordon, the VP of Global Sales Operations at Pure Storage. “I can’t have the marketing view of the revenue pipeline and the sales view and a finance view - all based on different data sets. I need to have one view of pipeline. So we’re bringing that organization together to centralize those different data sets so that everybody is operating off a single source of truth.”
4. **Commercial Enablement:** This includes building commercial capabilities that enable, develop and retain front line revenue teams and maximize their contribution to expanding customer lifetime value at every stage of the revenue cycle. A key aspect of the job is to coordinate, connect and align the sales and marketing systems that support the revenue cycle including marketing automation, CRM software, sales enablement, sales engagement, and customer success management platforms. 75% of organizations are tasking their sales enablement and operations team to re-configure their commercial enablement technology investments with an eye for simplifying the seller workflow, improving the quality of engagement and reducing administrative costs according to research in the book Revenue Operations.
5. **Commercial Asset Management:** This is the strategic management and monetization of the commercial technology, data, and digital selling channel assets to maximize their utilization, financial returns and revenue impact. This is important because the average organization has over 25 tools and services that support the revenue team. Usually these are spread over a dozen different organizations. Capital and operating investment in this growing commercial tool portfolio is expected to exceed \$10,000 per front line seller at high growth organizations. “We don’t really talk in sales and marketing at our company,” says Jenna Pipchuk, the EVP in Chief Sales Officer of Smart Technologies. “We really talk about the Unified Commercial Engine which is all the people, channels and the entire revenue stack that supports the revenue cycle. And we work together on that.”

Some organizations are folding all of the operations and systems that support the revenue cycle under one growth leader. For example, Affirm has put in place a Revenue Operations VP reporting to the Chief Commercial Officer, who has analytics, sales enablement, program management, field operations, selling systems and tools, and incentive compensation as direct reports. Others have expanded the remit of existing operations function, as in the case of Conga, which added Sales Operations, Field Operations, Deal Desk, and Order Operations under the purview of Marketing Operations leader, as part of a RevOps Transformation initiative.

Our analysis also found the Revenue Operations job function is a moving target. The role is constantly evolving as organizations consolidate the operations and systems that support the revenue cycle. “Revenue operations is the future evolution of sales operations,” says Mary Lee, Senior Director, Business Operations at Lionbridge, who manages CRM, analytics, financial reporting and advanced analytics in her role. “The industry is moving on a journey along a continuum from sales operations to revenue operations. Sales operations wasn’t even a function 15 years ago. It started as reporting. It expanded into technology with the administration of CRM. Then we had to connect selling measurements to financial measurements. Then we had to integrate

marketing technology with sales technology. Then we had to change the behavior of the sales team. And we have to motivate them with incentives and quotas. The role keeps getting bigger and bigger.”

Haley Katsman the VP of Revenue Strategy at Highspot, has a control over most of the operations and technology that supports the revenue cycle within her remit. Haley is a new generation of Revenue Operations leader who has a command of data and finance and can inform the board level conversation on managing consistent and scalable revenue growth. “In my role, I have unprecedented access to revenue intelligence because I manage all of the primary operations that support the revenue cycle - sales enablement, sales operations, analytics,” says Katsman. “This gives me access to powerful customer engagement and interaction data that can help us better manage revenue growth by enriching our measurement and making our revenue forecasts more precise, reliable and reflective of the current situation on the ground.”

“As the leader of Global Sales Operations at a fast growing \$3 Billion organization, my role is getting broader and broader every day across functions as we transform our commercial model and move from a historic Capex type model to more recurring revenue and subscription models,” says Steve Gordon, VP of Global Sales Operations, Pure Storage who is part of an Integrated Operations organization that is consolidating and connecting the traditional operations teams – sales operations, marketing operations, and customer experience operations - along the revenue cycle.

“To me, when tasked with managing and supporting a single interconnected revenue process it's all about alignment,” Gordon continues. “To better manage revenues in this environment, we're trying to bring data from multiple sources to the forefront and are working more cross-functionally across our different operations organizations that support the revenue cycle. Because I can't have the marketing view of the revenue pipeline and the sales view and a finance view - all based on different data sets. I need to have one view of pipeline. So we were working up different data sets and bringing that organization together and centralizing those different data sets so that everybody is operating off a single source of truth. A couple years ago we started an organization called Integrated Operations to do this. We took the traditional operations teams – sales ops, marketing ops, and customer experience ops brought them together. It also brought our analytics or advanced analytics, data science, business intelligence, and strategic planning teams together. While I'm not a big believer that an organization structure drives transformation, but I will tell you bringing everybody together to drive alignment and open up conversations does. Just bringing those teams together really started a different dialogue and that alignment is already paying dividends for us in terms of some results we're seeing.”

Regardless of the title, putting in place a growth leader with a mandate to unify and coordinate sales, marketing and service organizations into a high-octane growth machine will be essential to growing a business in the 21st Century.

Titles, remits, and job scopes will vary company to company. But the challenge of getting sales, marketing and customer success working as one revenue team will not disappear based on nomenclature. “There is a longstanding desire to create “new positions” with new titles to either attract talent, embellish a role with limited scope and authority or fundamentally realign different tasks and responsibilities,” adds Kim Whitler, Professor of Marketing at The Darden School of Business who has researched the recent emergence of Chief Customer Officer and Chief Growth Officer roles. “In the case of Revenue Operations, the moniker reflects the changing strategic priorities, business operation realignment, and new tasks and responsibilities that the company did not have before. For example, in many cases we are seeing marketers are being asked to take on a bigger role in supporting development, activation and expansion capabilities and take on a broader role in analytics and accountability as part of a Revenue Operations strategy.”

Revenue Operations is now essential to a career in any growth discipline. David Reibstein, Professor of Marketing at the Wharton School of Business points out that Revenue Operations addresses the real world problem that growing a business is fundamentally interdisciplinary in nature – by providing clear roles, structures, skills and systems leaders can use to manage, coordinate and align many disciplines coherently around the customer. In sales leadership, the Revenue Operations role has become a “farm system” for CROs because they have the data management, technical, and financial skills required to manage the modern commercial model, according to Warren Zenna, the founder of the CRO Collective. In marketing, Bob Liodice, the CEO of the Association of National Advertisers views Revenue Operations as an essential career roadmap for those who have made growth their cornerstone objective. In operations, it has been a career path and a ticket to the C suite. “Revenue operations is a critical issue for me because it's the future evolution of sales operations,” says Mary Lee of Lionbridge who has a front line operations role. “It's my career path.”

Through engaging over 100 growth leaders, revenue operations managers, and benchmarking their success in the marketplace, the Faculty of Revenue Operations Associates was able to isolate the specific financial, operational and management levers. According to the business leaders we interviewed, the remit of Revenue Operations is unique from the traditional sales operations, sales enablement, training and development and marketing operations roles from which they evolved. Notably,

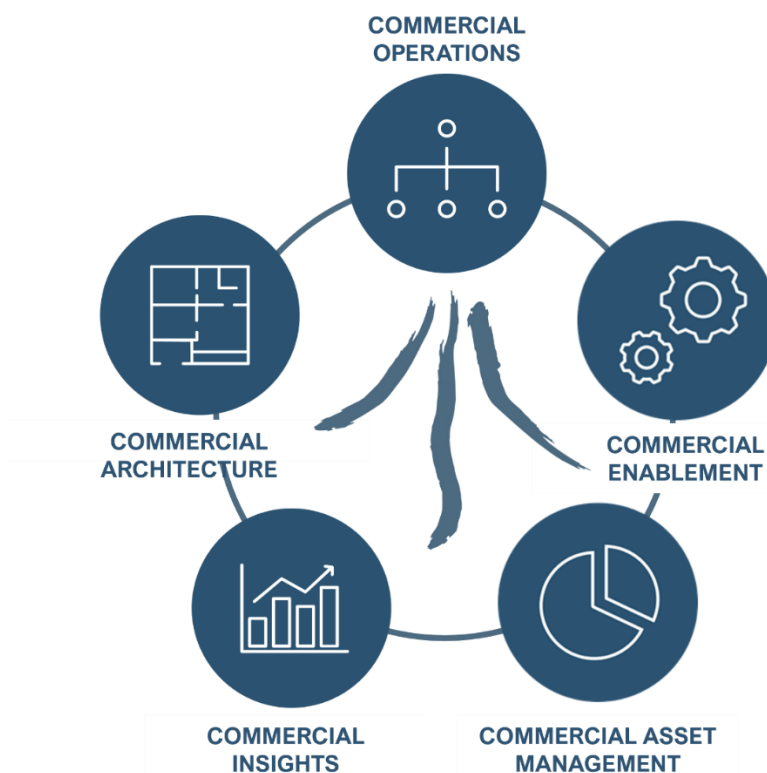
Revenue Operations is a newly configured operations role that is designed to deliver immediate financial gains and measurable performance improvement in several areas:

1. Eliminating the handoffs and “air gaps” in the prospect-to-cash cycle to revenue and margin leakage with a single point of management of the customer journey across the enterprise.
2. Redeploying operations resources to streamline the administration of data, technology, and content.
3. Redeploying operations and analytics resources to create scalable and consistent growth including 1:1 personalization at scale, real time training at scale, response management, data-driven sales resource allocation, and account based marketing.
4. Doubling the engagement, speed, and productivity of revenue teams by adjusting the commercial architecture and enablement while reducing the associated cost of sales.
5. Rationalizing the technology stack to eliminate waste, stranded or non-performing assets and improve seller experience and adoption.
6. Generating more commercial insights from customer engagement and seller activity assets.
7. Reallocating sales overhead from real estate and travel to more scalable investments in training and enablement.
8. Improving the economics of field selling by improving the speed of ramping sales reps, raising the overall level of readiness and skill across the entire revenue team, and reducing churn to retain top talent that performs at a high level.

IV. A BLUEPRINT FOR THE REVENUE OPERATIONS JOB FUNCTION

Five Core Disciplines of the Revenue Operations Role

The role of Revenue Operations is evolving along five dimensions. They including managing commercial operations, generating commercial insights, enabling commercial teams with technology, curating commercial data and channel assets, and architecting the commercial model. These primary elements of the Revenue Operations role – current and future – are summarized with more detailed examples on the following pages. Every Revenue Operations job evaluated by our team had elements of these five core competencies embedded within.

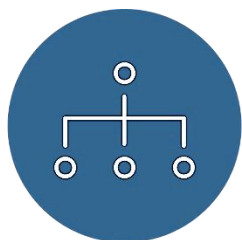


The table on the next page breaks down the core responsibilities and remits that underly these five elements into specific operational components that comprise the revenue operations job function. The core responsibilities and remits that underly these five elements of the Revenue Operations model are explained on the following pages.

While these core capabilities are universal to RevOps, specific job descriptions, roles and remits vary by company. Many of these variances are based on the size of the organization. In smaller companies operations professionals may wear many hats. For example, over 60% of RevOps leaders say their job encompasses sales operations, customer success operations and marketing operations according to the book *The RevOps Advantage*, by Dr. Amy Osmond Cook. In larger organizations, RevOps roles can become more specialized into different functional, process or systems domains. To get more specific, this analysis of the capabilities and remits underlying these five core Revenue Operations disciplines expand into fifteen discrete job responsibilities. For example, professionals with a sales operations role will emphasize commercial architecture – which involves the allocation of sales resources, territories, and quotas – as a core part of the job. Professionals with a CRM administration focus will emphasize the curation of customer database assets which inform sales forecasts, campaigns, KPI and account plans. In the next section, we then map these five core RevOps disciplines and capabilities to the fifteen functional roles that have emerged within the rubric of Revenue Operations over the last twenty years.

A BLUEPRINT FOR ALIGNING SALES, MARKETING AND CUSTOMER SUCCESS TEAMS TO OPTIMIZE GTM PERFORMANCE AND MAXIMIZE REVENUE GROWTH

DIMENSION	DEFINITION	CORE COMPETENCIES
 COMMERCIAL OPERATIONS	Aligning the operations that support growth programs and enable human sellers along the entire revenue cycle and providing coherent management of all of the systems, assets, content, and digital selling infrastructure that support revenue teams	1.0 Sales and Marketing Operations. Planning, supporting, consolidating, and measuring sales and marketing programs and the processes and systems that support them
		2.0 Commercial Process Management. Establish, measure, and optimize an enterprise commercial process that spans the entire revenue cycle and spans the marketing, sales and customer success functions
		3.0 Forecasting and Reporting. Reporting pipeline performance reports and developing the sales opportunity, revenue and financial forecasts with finance
 COMMERCIAL ARCHITECTURE	Redesigning the commercial architecture to maximize coverage, control, and the return on selling assets by improving the speed, visibility, productivity, and engagement of front line selling teams and reducing cost to sell.	4.0 Go to Market Architecture Redesign the go-to-market strategy and sales force design to improve performance, engagement, costs and the customer experience
		5.0 Planning and Resource Allocation. Optimize the allocation of growth budgets, resources, and investments and support integrated growth planning with finance
 COMMERCIAL INSIGHTS	Using advanced analytics to turn customer engagement data into commercial insights that inform selling priorities, decisions, actions, and conversations and optimize the allocation and return on growth resources, assets and effort.	6.0 Data Driven Selling. Analyze data from across departments to better inform customer targeting and prioritization, guided selling and coaching, and personalization at scale
		7.0 Performance Measurement. Establish fact-based reporting analytics and KPIs to measure commercial performance and inform the allocation of growth investment, resources and effort.
 COMMERCIAL ENABLEMENT	Building a common core of commercial capabilities that enable, develop and retain front line revenue teams and maximize their contribution to revenue and profit growth and expanding customer lifetime value at every stage of the revenue cycle	8.0 Sales Enablement and Engagement. The design, deployment, integration and management of systems to simplify the day to day selling workflow and enhance revenue team engagement.
		9.0 Sales Training and Development. Design, deploy, integrate and manage to better support sales readiness, training, and development
		10.0 Quote to Cash Operations. Design, deploy, integrate and manage to enhance the lead-to-cash cycle and capture more revenue, margin, and price.
 COMMERCIAL ASSET MANAGEMENT	The strategic management and monetization of the commercial data and technology assets to maximize their utilization, impact, and financial returns and accelerate revenue growth	11.0 Commercial Technology Portfolio Management. The centralized stewardship and reconfiguration of the commercial technology portfolio across functions and every stage of the revenue cycle
		12.0 Customer Data Asset Management. The centralized stewardship of CRM data and establish a common architecture and operating system to consolidate, enhance, curate and monetize customer data assets



COMMERCIAL OPERATIONS

Aligning the operations that support growth programs and enable human sellers along the entire revenue cycle and providing coherent management of all of the systems, assets, content, and digital selling infrastructure that support revenue teams. Sales, marketing, and customer success organizational silos are vestiges of a 20th century commercial model which is based on a linear and lock step sales funnel heavy on face to face selling and paid media. In the 21st century the customer experience has become the basis of competitive advantage and the growth investment mix is dominated by owned digital channel infrastructure and the content, data, teams, and technologies that support them. To succeed in this new market reality, growth leaders will need to reconfigure the operations that support human sellers and provide end-to-end coherent management of all customer facing assets, investments, and the customer journey. “The CEO may give lip-service to “customer centricity,” but who in the C-suite actually owns the cross-functional authority, budget, and process engine to implement the growth

technology portfolio, set up the teams that will track and act on the data, and propose the bigger breakthrough innovations that cut across typical silos?” asks David Edelman of the Revenue Enablement Institute. Managing cross functional commercial assets, processes and teams requires air cover and funding from their Chief Operating Officer, or from a newly created Chief Customer Officer, Chief Experience Officer, or other C-suite lead who has the authority to address tough issues that cut across the typical functional hierarchy of most large companies. Wade Burgess, the Chief Revenue Officer for Velocity Global, attributes unifying commercial operations as a key to pursuing his extremely aggressive growth plan. “A really important step was putting in place a single revenue operations team with really solid, strong technical people from sales and marketing operations who can help us better leverage analytics to grow,” shares Burgess.



COMMERCIAL ARCHITECTURE

Redesigning the commercial architecture to maximize coverage, control, and the return on selling assets by improving the speed, visibility, productivity, and engagement of front line selling teams and reducing cost to sell. Growth leaders are reconfiguring their go to market strategies and sales force design and territory and quota plans to reflect changes in customer behavior and response, the impact of enablement technologies, and the need to focus on customer lifetime value. When you factor in all these changes, they can lead to significant improvements in short term efficiencies and long term growth. To realize these gains, all aspects of the commercial architecture need to be updated to optimize coverage, control, cost to sell and the customer experience and reflect the productivity, engagement, and speed that enablement technologies and remote selling create. This involves redesigning the commercial architecture to maximize

return on selling assets by improving the speed, visibility, productivity, and engagement of front line selling teams and reducing cost to sell. A properly designed and optimized commercial architecture can contribute five to ten points of profit contribution to the bottom line in the short term, or if reinvested, can improve long term growth prospects by over 50% in the long term. For example, Avaya CEO Jim Chirico and his team had to reconfigure all aspects of the commercial architecture, including refocusing commercial operations on growing customer lifetime value, and aligning goals and incentives with the subscription model in order to accelerate the business model transformation at Avaya from on premises business to a growing cloud business.

Using advanced analytics to turn customer engagement data into commercial insights that inform selling priorities, decisions, actions, and conversations and optimize the allocation and return on growth resources, assets and effort. The emergence of



COMMERCIAL INSIGHTS

advanced analytics, AI, and Machine Learning (ML) – and the massive new sales engagement data sets to support them – represents the most significant opportunity to accelerate sales growth since the scale adoption of call centers (40 years ago), CRM (30 years ago), and digital channels (20 years ago) in sales. This has made the ability to capture and unify customer data and convert it into commercial insights that enable, optimize, and automate cross-functional sales, marketing, and service workflows a fundamental driver of growth and value creation. Turning that data into commercial insights that create value and inform decisions, actions, and conversations at the “moments that matter” in the human selling process is critical to growth and value creation. Kirsten Paust, the VP of Fortive Business Systems reinforces this growing importance of advanced analytics in the commercial process. “More and more of our core

commercialization processes are being supported by AI, insights and technology that enables our teams to get to insight and action faster,” according to Paust. Howard Brown, the CEO of Revenue.io who has worked with hundreds of organizations that

leverage insights to grow emphasizes the importance of turning big data into insights that deliver proscriptive guidance and one to one coaching at scale with every member of the revenue team. “The revenue team doesn’t want big data - they want guidance, recommendations and prioritization on what to do next,” says Brown. “What actions will drive value, and generate the highest return on their time and attention? Use data to focus revenue teams, not overwhelm them. Transform noise into sales guidance.” Raghu Iyengar, Professor of Marketing at Wharton echoes the importance of aggregating, orchestrating, and delivering actionable insights as the focus of Revenue Operations. “Having an automated way of analyzing such audio calls capturing the interactions with customers is critical to help answer operational questions e.g. “Who are our best live agents?” and “Why are customers calling us?”

Building a common core of commercial capabilities that enable, develop and retain front line revenue teams and maximize their contribution to revenue and profit growth and expanding customer lifetime value at every stage of the revenue cycle

Thousands of point solutions are built for the purpose of saving sellers time and making them more productive with the time they spend with customers. One in four members of the revenue team is now dedicated to supporting front line selling. To support scalable and consistent growth, enablement and operations leaders need to focus these resources on achieving continuous improvement in performance and finding ways to better enable human selling and maximize the contribution of selling assets and investments to revenue and profit growth. This cannot be done piecemeal across silos. A unified capital expenditure and operating model is needed to execute scalable technologies like 1:1 personalization at scale, coaching at scale, Account Based Marketing (ABM) at scale, and cross functional customer journey management. These capabilities are critical to enabling human selling and maximizing the contribution of selling assets and investments to revenue and profit growth outcomes. Peter Ford, the VP of Global Sales at iconectiv reiterates the importance of focusing on ways to make continuous improvements to the commercial process as the path to transformation. “It's hard to pinpoint any one thing that was the key to fixing or transforming our sales organization, because it's really the sum of many different marginal gains,” according to Ford. “So I broke down the specific areas that I was going to focus on changing with an eye towards making the quickest gains. Ultimately, I found that came down to focusing on people, process, and tools.”



COMMERCIAL ASSET MANAGEMENT

The strategic management and monetization of the commercial data and technology assets to maximize their utilization, impact, and financial returns and accelerate revenue growth. Most organizations don’t need more technology as much as they need higher returns on their commercial technology and customer data assets. Success in a 21st Century Commercial Model requires shared investment in commercial assets that enable revenue teams across the enterprise – including the sales and marketing technology portfolio, customer data, and owned digital selling channel infrastructure. These commercial assets are among the most valuable but underperforming assets in a business. This makes the strategic management of these data, technology, content, and IP assets to maximize their utilization, impact, and financial return a critical component of a Revenue Operations

model. David Master, the CMO of Janus Henderson, a global asset management and advisory firm, regards selling content, customer data, and enablement technology as commercial assets essential to growth. He views measuring the financial value and contribution of these commercial assets as the big hurdle to getting leadership to manage them more strategically as force multipliers. “Getting a higher return on assets is a measurement and attribution issue,” says Master. “The notion of return on growth assets is very intuitively obvious to most executives. The problem is measuring their impact on growth and firm value because they support cross functional goals and live in different silos.”

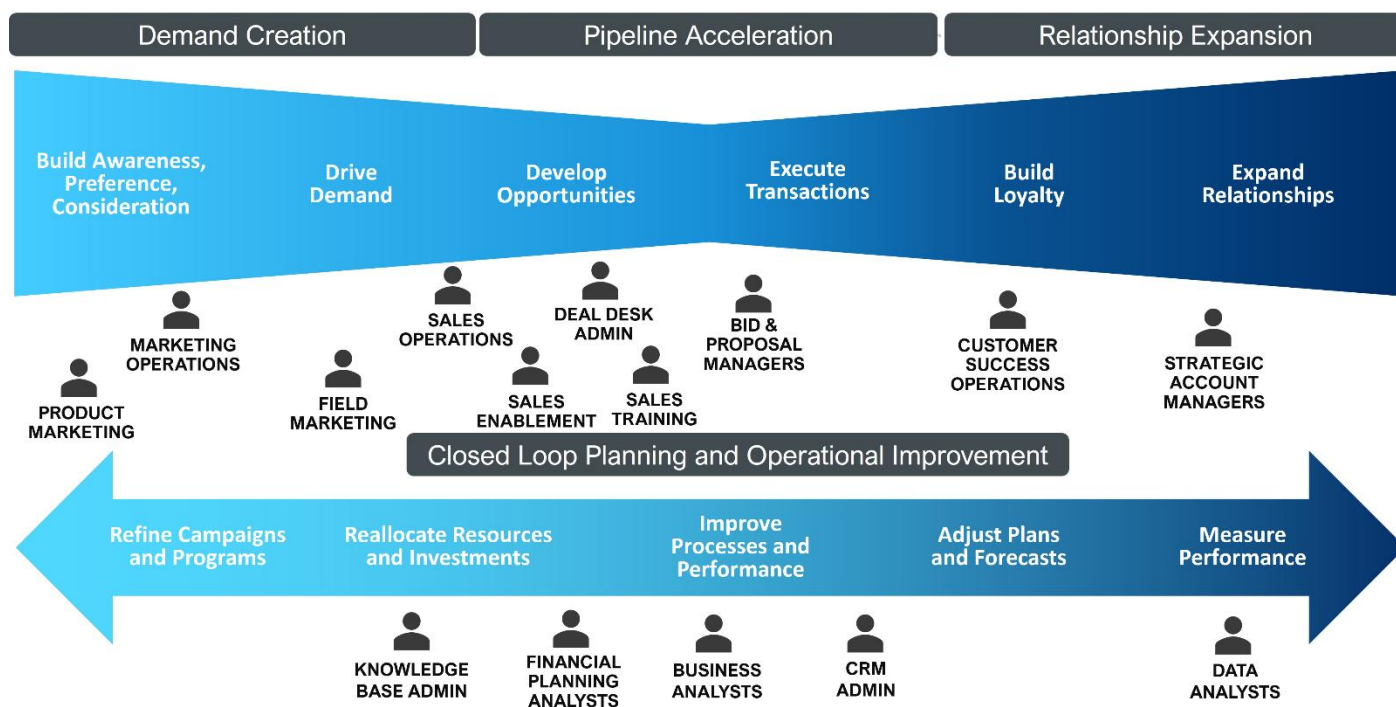
The capabilities and remits underlying these five core Revenue Operations disciplines expand into fifteen discrete job responsibilities. These capabilities and roles are detailed in greater depth in the 36-point Revenue Operations Maturity Model by the faculty of the Revenue Enablement Institute. Plotting these capabilities over time is important because it maps the evolution of the Revenue Operations function. This lets business leaders assess the state of their commercial transformation and identify the most financially viable way to “stairstep” their organizations towards greater alignment of sales, marketing and customer success teams, assets, systems, and processes.

The Fifteen Functional Domains That Make Up Revenue Operations

At larger and more sophisticated organizations, the capabilities and remits underlying the five core Revenue Operations disciplines expand into fifteen discrete job responsibilities. These roles span the entire revenue cycle. They range from marketing roles that support demand creation, to operational roles that support pipeline acceleration, and strategic account management roles that support relationship expansion. Some specialists like sales operations, bid and proposal managers, and financial planning and analysis will work across organizations to optimize cross functional processes like the lead to cash, response management, and product update process. There are a growing number of analysts that facilitate the closed loop planning and operational improvement process by reallocating resources, refining campaigns, define investments, and intervening with training to improve GTM performance. In addition, roles that manage and curate the knowledge, customer data, and content assets in the business - like CRM and knowledgebase administrators – are taking on a greater role in the GTM motion. This is because codified knowledge – in the form selling know how, product innovations and IP, and customer insights – are increasingly essential to driving the modern growth engine, particularly in an age where AI and advanced analytics are primary growth drivers.

The visual below plots these fifteen specific roles. Plotting these capabilities against the revenue cycle is useful because it helps leaders and professionals understand the wide variety of operational roles are required to run the modern GTM model. It also reinforces the importance of teamwork and collaboration across the revenue team to GTM execution and performance. While all of these jobs are important gears in the modern revenue engine, professionals with narrow domain specialties are only valuable to the degree they support the overall revenue engine and enable the entire revenue cycle.

THE FIFTEEN FUNCTIONAL DOMAINS WITHIN REVENUE OPERATIONS

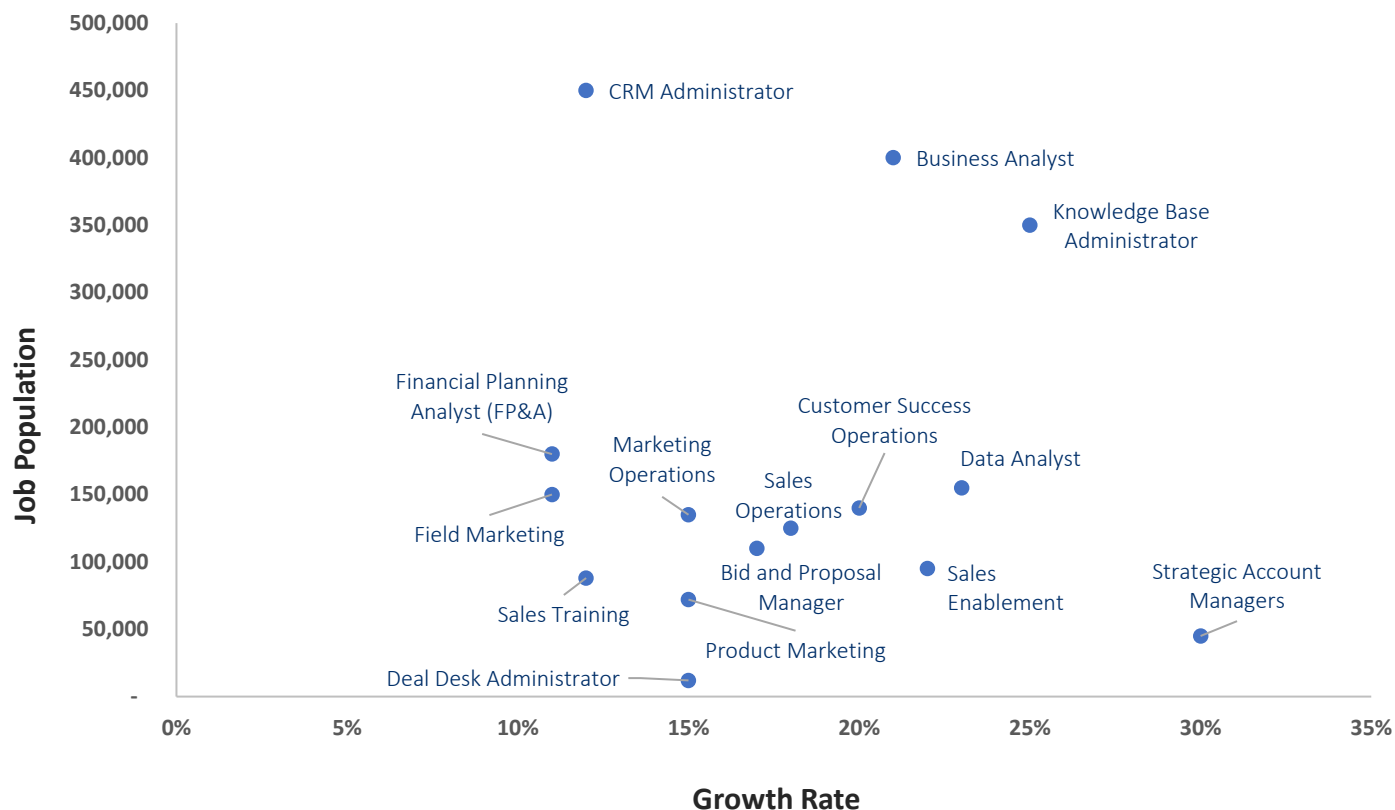


While the names may vary, all of these roles fall within Revenue Operations. In some smaller organizations they will be embodied in one individual. In larger organizations there can be hundreds of operational specialists supporting revenue generating teams, systems, processes and programs. Each role has its own association, community and identity with unique job descriptions, goals and remits. All fifteen of these roles – and the skills, capabilities and salaries associated with them – are detailed in greater depth in the table below.

In all there are over 2.5 million professionals in these roles across industries. And demand for these skills is growing. RevOps jobs are growing at over 18% annually as growing a business becomes a digital, data-driven and technology intensive team sport.

These are high paying jobs with significant salary and career upside. Postings for RevOps professionals have an average salary exceeding \$90,000 across all fifteen job roles. Advancing to the director and manager level within a functional discipline can lead to salaries ranging from \$200,000 to \$300,000. And a career in RevOps offers significant upside, with pathways into growth leadership and C suite roles.

THE GROWTH OF FUNCTION-SPECIFIC ROLES WITHIN REVENUE OPERATIONS



This creates career opportunities for a wide variety of professionals. What is unique about RevOps is there are relatively few barriers to getting into the field. Some of the most successful RevOps professionals have background in English, telesales, and limited technical training. RevOps is a great way for people with narrow technical and analytics jobs to expand their horizons and career trajectory by moving from narrow back office technical roles to front office roles with revenue impact and a more strategic scope.

Professionals seeking to advance their impact, career and salaries in Revenue Operations face several challenges though, according to Ashmi Pancholi, who has over a decade of experience leading RevOps teams at GE, Amazon, and Affirm.

While the basis of many of these roles involve mastery of a system or process, success in RevOps requires teamwork, business acumen, finance, change management, and consultative skills. “the Revenue Operations professionals that report to me have never really had an issue with understanding the specific technology and systems involved in their job,” says Ashmi Pancholi, who has over a decade of experience leading RevOps teams at GE, Amazon, and Affirm. “What separates high performing Revenue Operations “rock stars” is their business acumen, consulting skills, and their ability to understand how to connect and work together with other functional players and systems to drive reliable, scalable and profitable growth,” adds Pancholi, who majored in English. This view is reinforced by the fact that job roles that require cross functional collaboration, business acumen, and monetizing garner premium salaries and faster career trajectories.

Another challenge is the need to continually expand your skills to keep up with a dynamic environment and evolving role. As the systems, processes, data sets and content that drives the revenue cycle continue to consolidate into a more coherent GTM model – these fifteen job roles are collapsing into more robust RevOps roles that can have greater impact, resources and salaries. This creates an opportunity and dilemma for professionals vested in their domain from a career path and change management perspective. For the ambitious, it presents the opportunity to ever expand their remit, contribution, salaries and careers –

landing the most effective into the c-suite and board room. For the risk averse, this can mean career stagnation or even a layoff, as the GTM evolves and leaves their narrow roles behind – subordinating, automating or even eliminating traditional roles.

“The interconnected nature of growth, and the number of disciplines involved is why RevOps is fundamentally different than any other growth role out there,” adds Matt Volm, the CEO of the RevOps Coop. “RevOps spans over a dozen established but discrete roles and domains across the revenue team. For example, Marketing Ops just focuses on the marketing function, sales enablement just on training and developing new sales reps, CRM admins ensure the data around accounts, opportunities and buyers is correct and reliable.” What Matt Volm is referring to is the fact that the management of growth has expanded to over a dozen such domains, each with its own job function, association, skill set and technology stacks. They include the deal desk, bid and proposal management, data analysts, finance analysts, CRM and the operations, training and enablement teams that support customer facing employees. “In all it takes forty five different competencies to run the modern revenue engine,” adds Volm. “Very few managers, leaders and professionals understand them all, much less how they connect to generate scalable, profitable, and reliable growth. And as of now, they don’t teach that in business schools. They don’t include that in job descriptions. And they certainly don’t incentivize people to do all those things with legacy metrics.”

These capabilities and roles are detailed in greater depth in the table below.

THE FIFTEEN FUNCTIONAL DOMAINS WITHIN REVENUE OPERATIONS

BID AND PROPOSAL MANAGER

Bid and Proposal Managers lead the development of compelling, compliant proposals and RFP responses that win new business. They orchestrate cross-functional teams to create tailored value propositions that address prospect needs and differentiate the company from competitors.

Bid and Proposal Managers, or Response Management professionals, are a highly specialized GTM function that supports the cross functional process of responding to requests for proposals, information, or due diligence.

They support every stage of the revenue cycle by managing the end to end strategic response management process – from inquiry to proposal – as well as the closed loop feedback process that evaluates won loss data, builds propensity to buy models, and recommends product and messaging improvements that will increase win rates.

They use Revenue Enhancement systems, primarily proposal management systems, strategic response management platforms, and knowledgebases.

Their role is converging with roles in sales enablement and knowledge management because the systems, information and processes they support increasingly overlap with digital asset management and sales enablement systems in other parts of the business.

There are over 110,000 bid and proposal management professionals globally according to the Association of Procurement Professionals (APMP) – as over half of all B2B revenues come from formal requests for proposal, information or due diligence and the process ties up a large number of product, marketing, sales, finance legal and agency resources. The profession is growing at 17% as CMOs and CROs recognize the potential of AI and advanced analytics to streamline the cross functional

The median salary of a bid and proposal manager is over \$100,00, with more experienced and seasoned professionals can make over \$125,000 as they expand their remit into a strategic response management capacity.

Bid and proposal managers can advance their salary and career by expanding their skills to move into Strategic Response Management, Content Strategy and Information Architecture positions, or transition to leadership roles in Sales enablement and RevOps.

BUSINESS ANALYST

Business Analysts bridge the gap between business needs and technical solutions, analyzing processes, requirements, and performance to drive operational improvements and support strategic decisions that enhance revenue generation. Their overall responsibilities are to conduct business process analysis, identify and recommend process improvements, analyze business performance data and identify trends.

To support the GTM, business analysts will help finance and sales leaders with inputs to forecasting, recognizing and realizing revenues as well as calculating margins, cost to sell and the transaction economics that make up key performance indicators. They help sales, customer success, and account leaders analyze customer health, lifetime value, and account potential. In addition, business analysts support growth planning by sizing opportunities and markets and providing top down and bottom up inputs to salesforce design and capacity planning in order to optimize the allocation of growth resources.

Business analysts will primarily support the revenue cycle during the closed loop process of planning and operational improvement. They support this process for continuous improvement by evaluating ways to improve the processes that support the revenue cycle, identifying bottlenecks and inefficiencies that impede sales. As part of this they help implement systems that streamline customer acquisition, order processing, and revenue recognition.

To conduct this analysis, analysts will use a variety of business intelligence and analytic tools and access data from front end CRM and back end ERP systems for data analysis.

Business Analysts create value by ensuring business solutions align with actual needs, reducing costly rework, improving operational efficiency, and enabling data-driven decision-making. They help the organization adapt processes to changing market conditions and customer expectations.

The business analyst role increasingly overlaps with Financial Planning Analysts and Data Analysts to some degree because these analysis increasingly rely on the same data sets and systems and feeds a more unified management of the GTM.

There are over 400,000 professionals with the business analyst title and a large percentage of them conduct analysis that supports the GTM process. The profession is growing at over 20% a year as organizations become more data driven and seek to use AI to help mine and monetize the growing set of customer engagement data to improve GTM performance and revenue growth.

The median salary of a business analyst overall is \$98,000, and compensation will vary based on the nature of support they provide an organization. Business analysts can advance their salary and career by expanding their analytics skills and GTM acumen to take on broader sales operations and Revenue Operations leadership roles.

CRM ADMINISTRATOR

A CRM Administrator is highly specialized function that ensures the optimal configuration, maintenance, and operation of the company's customer relationship management system. They maximize CRM adoption, data integrity, and functionality to support effective customer engagement and sales processes.

CRM Administrators support every stage of the revenue cycle indirectly by collecting, organizing and analyzing customer engagement data from demand creation campaigns and sales calls and deploying those insights to inform both day to day selling actions as well as develop and optimize sales plans, forecasts, and resource allocation decisions.

The use CRM as a primary system of record for sales and are connecting a widening variety of marketing automation, sales readiness, engagement, and enablement systems to provide a simplified seller workflow and more integrated GTM program execution. 91% of companies with 11 or more employees use CRM software.

The CRM Admin creates value by optimizing the central system where customer relationships are managed, enabling more efficient sales processes, providing reliable data for forecasting, and ensuring that institutional knowledge about customers is properly captured and accessible.

Their role is converging with business, finance, and data analyst functions as GTM leaders rely more on the first party data, account structures and opportunity data within CRM to run more sophisticated sales and marketing programs, better measure business impact and create more reliable revenue and cash flow forecasts.

The information they control supports GTM leaders including forecasting, recognizing and realizing revenues, Calculating margins, costs and transaction economics, analyzing customer health, lifetime value, and accounts. They also help sales and

marketing leaders to size opportunities and markets, tune the salesforce design, and optimize the allocation of growth resources

There are over 450,000 CRM administrators in businesses that use the primary CRM platforms (Salesforce, Microsoft Dynamics and HubSpot) and a large community Salesforce “trailblazers” certified in CRM. The profession is growing at over 10% a year as GTM teams increasingly use CRM as a hub to connect, consolidate and integrate their commercial technology stacks.

The median salary for a CRM administrator is \$74,000. CRM administrators can advance their salary and career by expanding their business skills to progress to Senior CRM Administrator, CRM Manager, CRM Director, or transition to roles in Sales Operations, Marketing Operations, or data analysts.

CUSTOMER SUCCESS OPERATIONS

Customer Success Operations professionals optimize the systems, processes, and data that enable effective customer success management. They build the operational infrastructure that allows customer success teams to scale efficiently while delivering consistent customer experiences.

The primary roles of customer success operations is to design and implement customer success processes, technologies, and workflows. They develop resource allocation models and standardize customer onboarding and success methodologies for customer success teams.

They support the revenue cycle by maximizing customer satisfaction, adoption, consumption, loyalty, cross sell and revenue expansion. In this endeavor, they employ a variety of systems, including customer success platforms, CRM and business intelligence tools to create reporting dashboards and analytics for customer health.

Customer Success Operations creates value by increasing the efficiency and effectiveness of customer success teams, enabling data-driven decision making, and ensuring consistent execution of customer success strategies that maximize customer lifetime value.

Their role is converging with marketing and sales operations and strategic account development initiatives as GTM organizations seek to better coordinate customer efforts and programs to monetize customer success by maximizing customer lifetime value and net recurring revenues.

There are over 140,000 customer success operations professionals, and over 11,000 job postings for "Customer Success Operations on [LinkedIn](#). The profession has growing at over 20%, driven by the broad adoption of the customer success function at almost every (95%) technology and Software as a Service (SaaS) firms according to Gainsight research.

The median salary for a customer success operations professional is \$83,000. Customer success operations professionals can advance their salary and career by expanding their skills to become a Director of Customer Operations, VP of Customer Success, or transition to roles in Revenue Operations, Sales Operations, or broader Operations leadership.

DATA ANALYST

Data Analysts collect, process, and analyze data to provide actionable insights that drive marketing and sales decisions. They transform raw data into meaningful information that improves campaign performance, customer understanding, and revenue growth. While this is a broad and fast growing function in every business - many data analysts, scientists and business intelligence professionals are dedicated to supporting GTM efforts with insights, measurement, and analysis. Data analysts support revenue generating processes by more reliably forecasting, recognizing, and realizing revenues. They calculate margins, selling costs and transaction economics. They help size opportunities and allocate resources by analyzing customer health, lifetime value, and accounts and sizing opportunities, segments, and markets.

Data Analysts create value by uncovering hidden patterns in data that lead to better decision-making, more efficient resource allocation, and improved targeting of marketing and sales efforts. They help the organization focus on activities with the highest potential return.

Their role is converging with CRM administration, financial planning analysts, and business analysts as organizations seek to analyze and monetize their data and information assets using AI and data-driven selling efforts.

Overall, there are over 200,000 data analyst jobs and a growing percentage support GTM processes, programs and analysis within a Revenue Operations organization. The profession is growing at over 20% a year, driven by the digital transformation

of the business and growing desire to use AI to multiply the performance and productivity of GTM teams, assets and investments.

The median salary of a data analyst overall is \$80,000, but compensation levels will vary based on the nature of support they provide a GTM organization and the depth of their analytical skills and training. Data analysts can advance their salary and career by expanding their skills to move into specialized roles in Marketing Analytics or Sales Analytics or with added business acumen can advance to more senior Revenue Operations leadership roles.

DEAL DESK ADMINISTRATOR

The Deal Desk Administrator, or Revenue Desk Admin, streamlines and standardizes the deal management process to accelerate sales cycles while ensuring compliance with pricing and contract policies. They facilitate effective collaboration between sales, legal, finance, and delivery teams to close complex deals efficiently. Deal desks are now standard in 70% of modern sales organizations to manage non-standard deals and approvals.

A specialized function that acts as a point of control in the front of the revenue cycle to review quotes and proposals for accuracy, and compliance and coordinate approval workflows for non-standard deals. They work with Finance, product and sales teams to support pricing analysis and exception requests. They increasingly work with finance and customer success deeper in the revenue to manage downstream revenue and margin leakage, build more reliable revenue forecasts and reduce custom billing and collection issues on complex consumption based contracts.

To that end, the Deal Desk Admin supports the revenue acceleration stage of the revenue cycle by facilitating efficient deal review and approval processes. They provide sales and financial leaders with a point of control over pricing, margin leakage, risk and future cash flow forecasts by providing governance over pricing and contracting decisions and terms.

To do their jobs, they use Configure, Price, Quote systems to get control over pricing, terms, discounts and proposals and approvals on non-standard deals. Automating the systems that enable the configure, price and quote process can reduce errors in quotes and pricing by a third or more – and provide CFOs and CROs greater visibility and control over the sales cycle.

The Deal Desk Admin creates value by reducing sales cycle length, ensuring pricing consistency, mitigating contractual risks, and freeing sales representatives to focus on selling rather than administrative tasks.

The role of the deal desk admin is converging with other data, knowledgebase management and analyst roles that rely on deal data, product content, selling “know how” to feed AI agents and advanced analytic models to govern pricing, maximize margins, boost win rates, and optimize GTM performance across the GTM ecosystem.

There are 12,000 deal or revenue desk professionals working for organizations that sell complex and bundled solutions. There are thousands of job postings on [LinkedIn](#) within the "deal desk" field including "Deal Desk Administrator," "Deal Desk Analyst," "Deal Desk Specialist," and "Deal Desk Manager. The profession is growing at 15% a year, driven by the growing complexity of selling to increasingly demanding and diligent B2B buying teams and pressure from finance to govern pricing, terms and manage compliance risks.

Deal Desk Administrators can advance their salary and career by expanding their skills to become a Deal Desk Manager, Commercial Operations Manager, or transition to roles in Sales Operations, Revenue Operations, or Contract Management

FIELD MARKETING

The Field Marketing Council defines field marketing as 'measurable, face-to-face brand development and customer relationship management through using highly trained people. To that end, Field Marketing professionals design and execute localized marketing initiatives that generate leads and build relationships in specific geographic regions or market segments.

They create customized, region-specific programs that support sales teams in their territories. Field marketers use a variety of systems ranging from event management platforms to marketing automation and CRM platforms to support these programs.

Field Marketing supports the demand creation, sales acceleration and increasingly relationship expansion stages of the revenue cycle – with localized demand generation activities that drive qualified leads into the sales pipeline. They provide sales teams with region-specific marketing support that accelerates deal progression and builds stronger customer relationships in target markets.

Field Marketing professionals create value by tailoring the company's broader marketing strategy to the unique needs of specific regions, providing sales teams with highly relevant support materials, and creating personalized customer experiences that improve conversion rates and average deal size.

Their role is converging with other marketing and sales operations roles as the systems they use, the data and content they rely upon, and programs they manage become more integrated in a more orchestrated GTM motion that spans channels and stages of the revenue cycle. The profession is growing at 5.5%, driven by the rising cost of field sales, events and programs and the growing desire for B2B customers to engage through digital channels.

There are over 150,000 field marketing positions, with over 30,000 field marketing positions currently listed on [LinkedIn](#)

The median salary of a Field Marketing professional is \$86,000, and top earners can make over \$120,000 annually.

Field Marketing professionals can advance their salary and career by expanding their skills to become a Field Marketing Director, Regional Marketing Director, Global Field Marketing lead, or transition to broader marketing roles like Brand Marketing, Demand Generation, or eventually CMO.

FINANCIAL PLANNING ANALYST (FP&A)

Financial Planning Analysts develop and maintain financial models and forecasts that guide strategic decision-making and resource allocation. They provide financial insights that enable the organization to optimize revenue growth while managing costs effectively.

In a general sense, their primary role is to develop and maintain financial planning models, create revenue and expense forecasts, analyze actual performance against those forecasts.

In a GTM context, financial planning analysts support every stage of the revenue cycle by managing cash flow, margins and revenue leakage from the demand creation stages through account expansion and retention. In fact, today most (60%) Financial Planning and Analysis (FP&A) organizations are actively driving global process ownership of end-to-end processes for booking, reporting, and forecasting revenues. This means analysts must collaborate heavily with departments to understand financial needs and analyze the financial impact and performance of growth investments, assets and programs.

To conduct this analysis, FP&A professionals use a variety of business intelligence tools, spreadsheet applications, and increasingly AI agents that tap into data from front office (CRM) and back office (ERP, Accounting) systems.

Two thirds of finance executives believe aligning with front office systems; teams and processes will create value by improving the reliability of revenue and cash flow forecasts and increasing sales by 5% while simultaneously lowering finance and sales cost by 5%.

The role of a Financial Planning Analyst is converging with other business and data analyst roles - as well as CRM administration to some degree - as organizations seek to analyze and monetize their customer engagement, contract, opportunity and consumption data and information assets using AI and data-driven efforts to optimize revenue, margins, and cash flow.

There are over 180,000 Financial Planning Analysts, and over 16,000 active job postings on [LinkedIn](#) for "Financial Planning Analyst". The profession is growing at 11 percent a year driven by the desire to manage cash flow along the revenue cycle and use advanced analytics to get more control over revenue and margin leakage and generate more reliable cash flow.

The median salary for a Financial Planning Analyst is \$91,000. Financial Planning Analysts can advance their salary and career by expanding their skills to become a Senior Financial Analyst, FP&A Manager, Finance Director, VP of Finance, or eventually CFO. They may also specialize in areas like Revenue Planning or Strategic Finance.

KNOWLEDGE BASE ADMINISTRATOR

The Knowledge Base Administrator role is a broadly defined and fast growing function that creates and maintains a centralized repository of information that supports a wide variety of GTM processes – including response management, sales enablement, customer service, sales, and operational analysis.

They ensure critical knowledge is easily accessible, accurate, and up to date to drive operational efficiency and consistent customer experience.

The role has been elevated in importance as businesses become more data-driven and look to advanced analytics and AI to accelerate growth and monetize information and innovations. And it is quickly evolving to take on a greater role in the GTM motion of businesses because codified knowledge – in the form selling know how, product innovations and IP, and customer insights – is essential to driving the modern growth engine.

They support every stage of the revenue cycle by provisioning demand and sales teams, enabling the RFP response process, answering customer questions and providing won-loss and performance data to optimization models.

They provision the proposal management process with knowledge and expertise and up to date product information. They enable sales, digital marketing, customer success and increasingly AI enabled chatbots and recommendation engines with answers and content. And they mine customer engagement data platforms and CRM for revenue and customer insights.

74% of small and mid-sized businesses reported adopting digital knowledge management platforms. The Knowledge Base Admin creates value by using those knowledge bases to improve the speed, performance and impact of their core customer support, employee training, sales enablement, and proposal management processes. To support these processes, knowledgebase managers use a wide variety of systems to do this including customer data platforms, proposal management systems, digital asset management systems, and sales enablement systems.

The traditional knowledgebase management role is converging with bid and proposal management, sales enablement, content management, CRM administration, and data analysts roles as organizations seek to consolidate, organize and leverage the information and knowledge assets of their businesses in customer facing actions.

There are over 350,000 professionals in Knowledge management roles, across a wide variety of functions – and a sizable portion of them support customer facing processes. There are tens of thousands of job openings for knowledge base and knowledge management roles in the United States, with major job boards showing a high demand. For example, [LinkedIn](#) lists over 50,000 "Knowledge Base Jobs" in the U.S.

The profession is growing at 25 percent a year, driven by an increased focus on capturing and managing the knowledge assets of the business and leverage AI agents to reduce the labor, cost and time it takes to retrieve, personalize and deliver critical information to sellers and clients.

MARKETING OPERATIONS

Marketing Operations professionals optimize marketing processes, technology, and reporting to maximize efficiency and ROI. They establish the operational foundation that enables marketing teams to execute strategies effectively and measure performance accurately.

They support the demand creation stages of the revenue cycle by building audiences, tracking signals of intent, and supporting the execution of an array of digital marketing programs in paid, earned, and owned marketing channels.

The manage the key digital marketing platforms and databases including marketing automation and customer data platforms, as well as a growing array of ai agents that help manage campaign performance, opportunity potential, and account health.

Marketing Operations professionals create value by maximizing the efficiency of marketing processes, ensuring accurate measurement of marketing activities, providing actionable insights from data, and continuously improving the marketing technology ecosystem to enhance overall marketing performance.

Their role is converging with sales operations and field marketing roles because the systems they use are increasingly integrated and rely on common data, content and processes to support the GTM.

There are over 135,000 marketing operations professionals, with over 35,000 job postings on [LinkedIn](#) for marketing operations specialist and manager roles. The profession is growing at 15% a year, driven by the emergence of digital and direct to customer channels in B2B and the digital transformation of the GTM.

The median salary of a marketing operations professional is \$101,000, with more experienced and senior professionals exceeding \$140,000 in compensation.

Professionals in Marketing operations can advance their salary and career by expanding their skills to become a Marketing Operations Director, VP of Marketing Technology, Chief Marketing Technologist, or transition to broader roles in Revenue Operations or Marketing leadership.

PRODUCT MARKETING

Product Marketing professionals develop and execute strategies that effectively position and promote products in the market. They translate product capabilities into compelling value propositions and ensure sales teams are equipped to communicate these effectively to prospective customers.

Product Marketers are primary contributors to sales enablement and training and Configure Price Quote systems used during the sales processes, ensuring product innovations are conveyed to customers through sales, marketing and partner channels.

Product marketing managers support the demand creation, sales acceleration and relationship expansion phases of the Revenue Cycle. They create localized demand generation activities that drive qualified leads into the sales pipeline. They provide sales teams with region-specific marketing support that accelerates deal progression and builds stronger customer relationships in target markets.

Product Marketing creates value by ensuring products are positioned to meet market needs, differentiating offerings from competitors, enabling effective sales conversations, and supporting pricing strategies that capture maximum value from the market.

Their role is converging with content and knowledge management roles as organizations aggregate, organize and mine their product content, pricing, and 'know how' to support their core training, enablement, deal desk, product release, and proposal management processes with consistent and up to date information.

There are over 100,000 Product Marketers in the product marketing community. The profession is growing at 15% a year driven by a growing emphasis on Product Led Selling (PLS) strategies in fast growing SaaS and technology businesses.

The median salary of a product marketing professional is over \$100,000, with more senior management positions exceeding \$148,000 in compensation. Product Marketers can advance their salary and career by expanding their skills to become a Senior Product Marketing Manager, Director of Product Marketing, VP of Product Marketing, or transition to roles in Product Management, Marketing Leadership, or General Management.

SALES ENABLEMENT

Sales Enablement professionals provide sales teams with the tools, content, and information they need to sell effectively. They bridge the gap between marketing, product, and sales to ensure sellers have the resources to engage buyers and close deals efficiently. They support the demand creation and pipeline acceleration and expansion phases of the revenue cycle by providing customer facing employees with the sales playbooks, product information, selling content, value selling tools and client education assets used in modern selling. Sales enablement at its core is maximizing the sales organization's ability to communicate value and differentiation in clear, consistent, and compelling way. Over 80% of B2B companies now have a dedicated sales enablement function, up from 59% in 2017 according to LinkedIn.

Sales enablement professionals manage core Revenue Enablement platforms including sales enablement, sales training and readiness and digital asset management systems that house selling content. They also rely on AI Agents and recommendation engines that help sellers find the right content at the right time in the right context.

Sales Enablement creates value by improving sales efficiency, reducing the time sellers spend creating or searching for materials, ensuring consistent messaging, and helping sales teams adapt quickly to market changes and new product launches.

Their role is converging with sales training, readiness and engagement roles as well as knowledge management roles as sales readiness, enablement and engagement solutions consolidate into one common platform supported by the same customer data, content and processes.

Today there are over 100,000 sales enablement professionals, with over 25,000 job postings on [LinkedIn](#). The profession is growing at 22%, driven by the emergence of digital selling motions and the growing importance of revenue enablement technologies in B2B selling. "Sales enablement specialist" was the sixth fastest-growing job title on LinkedIn in 2023.

The median salary for a sales enablement professional is \$100,000, with more senior and experienced positions exceeding \$140,000 in compensation. Sales enablement professionals can advance their salary and career by expanding their skills to become a Sales Enablement Manager, Director of Sales Enablement, VP of Sales Productivity, or transition to roles in Sales Operations, Marketing, or Sales Leadership.

SALES OPERATIONS

Sales Operations professionals design and optimize the systems, processes, and analytics that enable sales force efficiency and effectiveness. They create the operational infrastructure that allows sales teams to focus on selling activities while providing visibility into performance.

Their primary responsibilities include managing the sales technology stack and tools, creating sales forecasting models and reporting, and optimizing sales force design, territories, quotas, and resource allocation.

Sales operations professionals are critical to the closed loop planning and operational improvement process because their primary objectives are to identify ways to improve the efficiency and effectiveness of revenue-generating activities. Sales ops leaders do this by optimizing processes, providing performance visibility, and ensuring appropriate resource allocation, developing more reliable forecasts, and supporting strategic decision-making about sales investments.

Sales operations managers engage sales and finance to better manage the cross functional lead to cash cycle and eliminate revenue and margin leakage along the entire revenue cycle.

Sales Operations creates value by increasing sales productivity, improving forecast accuracy, enabling data-driven decision making, and designing compensation structures that motivate desired sales behaviors aligned with company objectives.

The imperative to align data and processes along the revenue cycle is leading to the inevitable consolidation of the marketing operations with the sales operations functions. “What is the difference between Marketing Operations and Sales Operations? – in two years there will not be one,” says Chris Thompson, VP of Global Marketing Operations at Conga

There are over 125,000 sales operations professionals overall, and currently over 25,000 Sales operations manager job openings posted on [LinkedIn](#). The profession is growing at 18% a year, driven by the pressure to align selling systems, processes, data sets and reporting at every stage of the revenue cycle – from demand creation to account expansion.

The median salary of a sales operations professional is \$107,500, with more senior management positions exceeding \$125,000. Sales operations professionals can advance their salary and career by expanding their skills to become a Sales Operations Manager, Director of Sales Operations, VP of Sales Operations, or transition to roles in Revenue Operations, Business Operations, or Sales Leadership.

SALES TRAINING

Sales Training professionals develop and deliver training programs that equip sales teams with the knowledge, skills, and tools needed to effectively sell the company's products or services. They improve sales performance through continuous learning and development. Sales Training professionals support the revenue acceleration and expansion phases of the revenue cycle. They also play a big role in making actions and interventions to improve business processes and seller performance during closed loop planning and operational performance.

Sales Training accelerates the productivity of recent sales hires and continuously improves the effectiveness of existing sales staff. They equip sales teams with the skills to identify opportunities, overcome objections, and close deals more efficiently. They create value by reducing ramp-up time for new hires, improving win rates, shortening sales cycles, and ensuring consistent sales approaches across the organization. They help sales teams adapt to changing market conditions and evolving buyer behaviors. To do their job they rely on sales learning, readiness, and enablement platforms as well as AI agents that analyze seller actions in real time and recommend adjustments to improve performance and skill levels.

Their role is converging with sales enablement and engagement roles as well as knowledge management roles as the sales readiness, enablement, and engagement solutions they use collapse into one common AI enabled platform supported by the same selling content, seller engagement and call tracking data and selling motions.

There are 88,000 sales training professionals. There are over 25,000 sales training job postings on [LinkedIn](#). The profession is growing at 12% a year as organizations increase their emphasis on strategic, value and relationship selling to more complex business buying teams using more sophisticated systems and software and channels.

The median salary of a sales training professional is \$10,000. Sales Training professionals can advance their salary and career by expanding their skills to become a Sales Training Managers, Director of Sales Enablement, VP of Sales Development, or transition to roles in Sales Management, Sales Enablement, or Learning & Development.

STRATEGIC ACCOUNT MANAGER

Strategic Account Managers represent an emerging and rapidly maturing set of roles with the primary goal of marshalling sales, marketing, product, and customer success resources to grow the value of customer accounts through increased adoption, consumption, loyalty, cross sell and expansion.

Formal titles vary given the nascent and fluid nature of this function. Titles can range from Account Based Marketing, Strategic Account “Pods” teams led by key account leaders, as well as strategic partnership between Customer Success teams and Sales to share valuable customer insights to ensure sales outreach is well-timed and relevant.

Their primary goal is to support the customer expansion stage of the revenue cycle by improving consumption, share of wallet, cross sell, and upsell across buyers in a given account. These customer facing teams rely on a variety of systems including Customer Success Platforms, CRM Platforms, and Account Based Marketing platforms as well as a range of third and first party data signals from product, third party and first party platforms.

Their role is converging with customer success, account based marketing and key account teams as GTM organizations seek to better coordinate customer efforts and programs to maximize adoption, loyalty, cross sell and customer lifetime value to increase net recurring revenues.

There are 45,000 professionals that operate in this capacity. The role is growing at 30% as GTM leaders are under pressure to personalize efforts to individual accounts, 1:1 account based marketing, grow net recurring revenues, facilitate cross sell and commercialize customer success.

Given the changing and varied nature of the role on a company to company basis, it is difficult to benchmark the average salary for a Strategic Account Manager. Job postings for the role range from \$88,000 to \$91,000 per year in compensation. Overall compensation can be much higher to the degree teams are compensation on expansion and cross sell revenues and customer lifetime value.

A Strategic Account Manager can advance their salary and career by expanding their skills to become a National Account Manager, Director of Account Management, or transition to roles in Sales Management or Customer Success leadership.

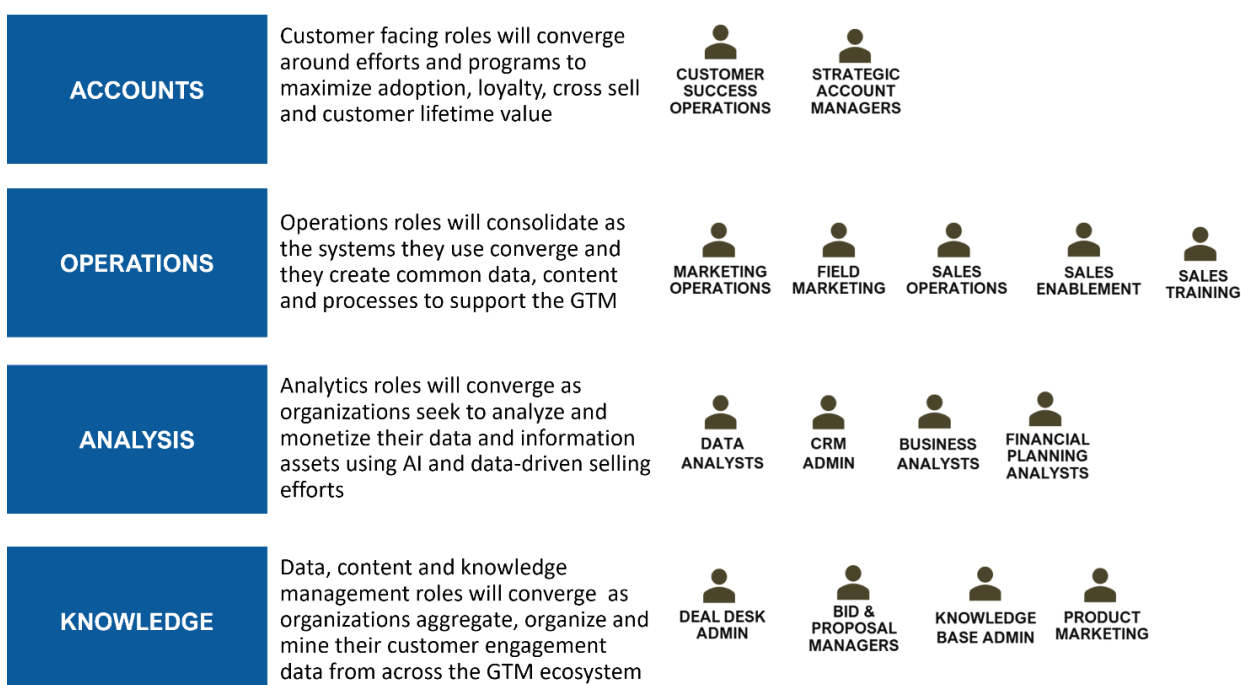
IV. A MATURITY MODEL TO GUIDE THE DEFINITION AND EVOLUTION OF THE REVENUE OPERATIONS JOB FUNCTION IN YOUR BUSINESS

The Evolution and Convergence of RevOps Roles

Our analysis revealed Revenue Operations job function outlined above is a moving target. The role is constantly evolving as organizations consolidate the operations and systems that support the revenue cycle. “Revenue operations is the future evolution of sales operations,” says Mary Lee, Senior Director, Business Operations at Lionbridge, who manages CRM, analytics, financial reporting and advanced analytics in her role. “The industry is moving on a journey along a continuum from sales operations to revenue operations. Sales operations wasn’t even a function 15 years ago. It started as reporting. It expanded into technology with the administration of CRM. Then we had to connect selling measurements to financial measurements. Then we had to integrate marketing technology with sales technology. Then we had to change the behavior of the sales team. And we have to motivate them with incentives and quotas. The role keeps getting bigger and bigger.”

As organizations evolve towards a more modern GTM model, the roles RevOps professionals play in them will converge around four centers of gravity. Functional operations roles across marketing, sales and customer success will converge as the systems, content, data and processes that they support will align along the revenue cycle. Analysts roles will converge as the data sets, dashboards, reports and metrics they support consolidate around a core set of measurements, KPI and models that better reflect the overall GTM performance rather than functional outcomes. Roles that curate data and knowledge assets will converge as organizations seek to consolidate, organize and leverage the information and knowledge assets of their businesses in customer facing actions. And customer facing account teams will form cross functional ‘pods’ that combine the efforts of marketing, sales, service, success and account management teams as they attempt to retain and grow existing clients.

THE EVOLUTION AND CONVERGENCE OF REVOPS ROLES



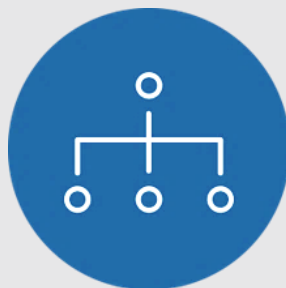
These capabilities and roles are detailed in greater depth in the 36-point Revenue Operations Maturity Model below. Plotting these capabilities over time is important because it maps the evolution of the Revenue Operations function. This lets business leaders assess the state of their commercial transformation and identify the most financially viable way to “stairstep” their organizations towards greater alignment of sales, marketing and customer success teams, assets, systems, and processes.

A MATURITY MODEL TO GUIDE THE DEFINITION AND EVOLUTION OF THE REVENUE OPERATIONS ROLE			
Role	Level One	Level Two	Level Three
1.0 Sales and Marketing Operations	Planning, supporting, and measurement of sales programs and managing the sales technology stack and analytics that support them.	Integrate sales and marketing operations and reporting with dotted line reporting to a central operations function. Integrated planning, support, and measurement of sales and marketing programs and consolidating the processes and systems that support them	Fully integrate all revenue operations, enablement, and analytics with solid line reporting to a central operations function. Unified planning and support for sales, marketing and customer success programs and consolidating the processes and systems that support them
2.0 Commercial Process Management	Aligning customer facing sales, development and account management teams along the revenue cycle to enhance the customer experience and maximize customer lifetime value. Consolidate the operations that support selling teams to simplify and streamline the seller workflow.	Aligning customer facing marketing, sales and customer success teams along the revenue cycle to enhance collaboration, customer experience and client expansion. Consolidate the operations that support revenue teams to support the implementation of selling pod structures and Account Based Marketing (ABM) programs.	Centralized stewardship of the entire revenue cycle, including ownership, design, documentation, implementation and measurement of the enterprise commercial process - and supporting all front and back office stakeholders in the product to cash cycle.
3.0 Forecasting and Reporting	Reporting pipeline and creating a sales forecast based on potential booking opportunities based on CRM and other front office data sources.	Revenue forecasting of ramp and run rate revenues over time applying revenue recognition rules on booked revenues, subscriptions and long term contracts and expansion potential.	Adjusting revenue forecasts and recognition for expansion via cross sell, upsell or contraction through terminations, contract amendments and usage shifts
4.0 Go-To-Market Architecture	The design, management and execution of territory and quote plans and sales incentives to optimize market coverage and quota attainment at the lowest cost to sell.	Redesigning the sales force design to adapt to digital selling and enhance revenue team performance, including: the design, manage and execute territory and quota plans to maximize the productivity of all customer facing resources.	Redesigning the go-to-market strategy and sales force design from the bottom up to maximize coverage, control and resource utilization and interact with finance on compensation and incentives to establish a common purpose across the entire revenue team to improve collaboration, customer experience and customer lifetime value.
5.0 Planning and Resource Allocation	Work with finance work together to reallocate seller resources and program budgets to the top accounts and markets and update the revenue plan to reflect customer, operational and market changes.	Work with marketing and finance to reallocate growth resources and investment and automate the planning process to more dynamically reflect changes in demand, market opportunity, account activity in the revenue plan.	The data-driven and dynamic allocation of go-to-market resources, budgets, programs and delivery capabilities to reflect market changes and maximize revenue growth, margin, market share, and return on investment/return on assets.
6.0 Data-Driven Selling	Analyze customer data from across departments to inform targeting, account prioritization, territory design, and day to day allocation of selling resources and efforts.	Analyze customer data from across departments to inform selling decisions including: next bestselling actions, recommender models that suggest next best offers, content and product and, and identify coaching and development priorities.	Analyze customer data to support 1:1 personalization at scale including personalized content for ABM programs, dynamic messaging, localization, and 1:1 coaching in real time.

Role	Level One	Level Two	Level Three
7.0 Performance Measurement	Analyze customer data from across departments to provide better visibility into leading indicators of performance along the entire revenue cycle, including measures of account health, pipeline activity, seller performance and forecasted revenues.	Analyze customer data from across departments to provide better visibility into the customer experience and account health and establish financially valid measures of the return on commercial investment and customer lifetime value.	Establishing financially valid measures of the performance of the end-to-end commercial process and create common incentives across functions based on customer lifetime value, cost to sell, and contribution to firm financial performance.
8.0 Sales Enablement and Engagement	Define, acquire, deploy and manage sales enablement systems that enable human engagement via sales channels and catalog, manage and deploy commercial selling content that supports sellers, including playbooks, competitive, validation, thought leadership content.	Integrate sales enablement, engagement and CRM solutions into a Digital Selling Platform to streamline and simplify the day to day seller workflow and improve speed, engagement and time focused on the customer.	Fully integrate sales enablement, readiness and engagement to support data-driven guided selling, proscriptive insights, and one to one coaching in real time.
9.0 Sales Training & Development	Develop, manage and execute sales training programs, content and systems. Assess sales talent, and enable the ramp, development and retention of sales reps.	Reconfigure and connect the enterprise sales enablement, training, and development technology portfolio into an integrated and closed loop process that provides feedback, reinforcement and visibly into seller activity and compliance	Consolidate and integrate enterprise sales enablement, training, and development systems, data and content to support data-driven coaching at scale in real time and optimize the sales rep recruiting, ramp, and retention process across the organization.
10.0 Quote to Cash Operations	Design and enable systems, rules, and operations to configure, quote, and approve deals, enforce pricing, discounting, and terms and ensure the fit, viability, and potential value of customers.	Integrate the roadmap to CPQ, billing and fulfillment tools to accelerate the lead to cash cycle, reduce revenue leakage, optimize price, and give finance greater control over margins, and better visibility into revenue recognition over time.	Automate the quote to cash process to extend financial control into the front office to investigate conflicting data sources and errors to better identify, diagnose and remediate problems leading to revenue leakage, variances, billing disputes and discrepancies on booked business.
11.0 Commercial Technology Portfolio Management	Central stewardship of the sales technology portfolio, including the implementation, rollout, training and support for the sales stack, prioritize investment that improve commercial productivity, simplify the seller experience, augment seller value, and reduce cost to sell	Centralized stewardship of the commercial technology portfolio. Implement, rollout, train, and support the marketing and sales stack, prioritize investments and prioritize investment that improve the customer targeting and support account based marketing.	Centralized stewardship of the commercial technology portfolio. Implement, rollout, train, support and connect key elements of the marketing, sales and customer success technology stack into a revenue operating system that improves responder rates, personalizes messages, improves customer relationships, and expands customer relationships.
12.0 Customer Data Asset Management	Centralized data stewardship to ensure the integrity, quality, value and monetization of customer data assets in CRM and other systems that support the sales team. Includes efforts to architect, map, clean, enhance, consolidate, and manage customer data for pipeline reporting and performance measurement.	Centralized data stewardship to architect, map, clean, enhance, consolidate first party customer data from marketing and customer touchpoints with customer data from CRM and third party data sources. Includes initiatives to leverage data in sales decision support, measurement, targeting, content and next bestselling recommendations.	Centralized data stewardship to ensure the integrity, quality, value and monetization of all customer engagement data assets in a unified customer data platform, including data from CRM and other first party systems that support sales, marketing and success. Includes efforts to architect, map, clean, enhance, consolidate, value and manage customer data as well as initiatives to leverage data in decision support, measurement, targeting, personalization and next bestselling recommendations.

Commercial Operations: Aligning Sales, Marketing and Customer Success Operations and Teams

COMMERCIAL OPERATIONS JOB DESCRIPTION



Aligning the operations that support growth programs and enable human sellers along the entire revenue cycle and providing coherent management of all of the systems, assets, content, and digital selling infrastructure that support revenue teams

COMPETENCY	LEVEL 1:	LEVEL 2:	LEVEL 3:
1.0 Sales and Marketing Operations. Planning, supporting, consolidating, and measuring sales and marketing programs and the processes and systems that support them	Planning, supporting, and measurement of sales programs and managing the sales technology stack and analytics that support them.	Integrate sales and marketing operations and reporting with dotted line reporting to a central operations function. Integrated planning, support, and measurement of sales and marketing programs and consolidating the processes and systems that support them	Fully integrate all revenue operations, enablement, and analytics with solid line reporting to a central operations function. Unified planning and support for sales, marketing and customer success programs and consolidating the processes and systems that support them
2.0 Commercial Process Management. Establish, measure, and optimize an enterprise commercial process that spans the entire revenue cycle and spans the marketing, sales and customer success functions	Aligning customer facing sales, development and account management teams along the revenue cycle to maximize customer lifetime value. Consolidate the operations that support selling teams to streamline the seller workflow.	Aligning customer facing marketing, sales and customer success teams along the revenue cycle to enhance collaboration, customer experience and client expansion. Consolidate the operations that support revenue teams to support the implementation of selling pod structures and ABM programs.	Centralized stewardship of the entire revenue cycle, including ownership, design, documentation, implementation and measurement of the enterprise commercial process - and supporting all front and back office stakeholders in the product to cash cycle.
3.0 Forecasting and Reporting. Reporting pipeline performance reports and developing the sales opportunity, revenue and financial forecasts with finance	Reporting pipeline and creating a sales forecast based on opportunities potential bookings based on CRM and other front office data sources.	Revenue forecasting of ramp and run rate revenues over time applying revenue recognition rules on booked revenues, subscriptions and long term contracts and expansion potential.	Adjusting revenue forecasts and recognition for expansion via cross sell, upsell or contraction through terminations, contract amendments and usage shifts

The Role of Revenue Operations In Reconfiguring Commercial Operations

Growth leaders are focusing on three areas to reconfigure the operations that support growth and enable human sellers to provide coherent, end-to-end management of all customer facing employees, assets, infrastructure, investments, and the customer journey. There are three core capabilities your organization will need to develop to improve your performance and realize greater growth from existing resources.



Sales and Marketing Operations. Planning, supporting, consolidating, and measuring sales and marketing programs and the processes and systems that support them

A key to building and enabling a revenue operations model is to establish a common purpose across sales, marketing, and customer success teams by reconfiguring the operations to align the goals, objectives, incentives and KPIs to create a common purpose and teamwork across all customers facing employees on the revenue team. These elements of the Sales and Marketing Operations role – current and future – are outlined below. Three levels of maturity are provided to help evaluate your commercial operations to identify key capability gaps and prioritize the most important ways an operations leader can move your revenue team to the next level of performance.

Level 1: Planning, supporting, and measurement of sales programs and managing the sales technology stack and analytics that support them.

Operations leaders are being asked to integrate sales operations and sales enablement with dotted line reporting to a centralized operations function. For example, the growth leadership at Smart Technologies takes a unified approach to the operations that support the revenue team. “We’re big believers in team of teams, says Jenna Pipchuk EVP in Chief Sales Officer of Smart Technologies. “We view growing a business as an alliance where all the teams that touch revenue have to work together and you have to fundamentally believe in the one unified revenue perspective. We really talk about the Unified Commercial Engine which is all the people, channels and the entire revenue stack that supports the revenue cycle. And we in sales work together with marketing, finance and product on that.

Pentair integrated sales operations and sales enablement into a Growth team with dotted line reporting to the newly formed Chief Growth Officer. “The Growth team focuses on the talent, processes and technology as well as provides a “home room” for the segment and business unit marketing teams, says [John Jacko](#) the Chief Growth Officer of Pentair. “We also have developed some shared service functions that support the businesses in their transformation.”

Level 2: Integrate sales and marketing operations and reporting with dotted line reporting to a central operations function. Integrated planning, support, and measurement of sales and marketing programs and consolidating the processes and systems that support them

More advanced organizations are integrating sales and marketing operations and reporting with dotted line reporting to a central operations function. For example, Jason Phipps and Joe Cumello lead sales and marketing respectively at Ciena Networks. Working together they were able to get sales operations, marketing operations and sales enablement to coordinate on integrating customer engagement and seller activity data from across the enterprise to build commercial dashboard, and performance measures. “A big part of our success (building a data-driven commercial dashboard) is rethinking how we organize our operations and enablement organizations, reports [Phipps](#), the CRO. “Operationally, we’ve had to coordinate and integrate marketing and sales operations. Joe and I have a common operations support team. Joe has Marketing operations on this team which creates the customer engagement dashboard, or what we’ve been calling the “EKG.” The sales enablement and sales operations folks who are focused on QOE (Quality of Engagement) measurements are on my team. But they’ll have a connection to Joe’s marketing operations leader, because when he’s looking at the customer engagement dashboard, or EKG, in the field, we know this is going to be correlated to the Quality of Engagement score. So, if we have a high QOE on a particular account, then it should have a better EKG.”

Level 3: Fully integrate all revenue operations, enablement, and analytics with solid line reporting to a central operations function. Unified planning and support for sales, marketing and customer success programs and consolidating the processes and systems that support them

The most sophisticated organization have fully integrated all revenue operations, enablement, and analytics with solid line reporting to a central operations function. “A really important step was putting in place a single revenue operations team with really solid, strong technical people from sales and marketing operations who can help us better leverage analytics to grow, reports [Wade Burgess](#), the Chief Revenue Officer of Velocity Global. “We used to have a sales ops person and a marketing operations team. Both of those were separate before. When I came on board and sales and marketing were both under me and I really wanted one person responsible for the operational tools, processes and systems that we use for monetization. It's a roll up of sales, operations, revenue, operations, and also sales effectiveness is in there and we're adding an insights person to that team. It's essentially all of the non-customer facing roles.”

2

Commercial Process Management. Establish, measure, and optimize an enterprise commercial process that spans the entire revenue cycle and spans the marketing, sales and customer success functions

A key to building and enabling a revenue operations model is to establish cross functional organizational structures to support human selling across the enterprise by reconfiguring the operations that support human sellers across sales, marketing and service functions including operations, and the management of data, tools, and analytics. These elements of the process management role – current and future – are outlined below. Three levels of maturity are provided to help evaluate your commercial operations to identify key capability gaps and prioritize the most important ways an operations leader can move your revenue team to the next level of performance.

Level 1: Aligning customer facing sales, development and account management teams along the revenue cycle to enhance the customer experience and maximize customer lifetime value. Consolidate the operations that support selling teams to simplify and streamline the seller workflow.

85% of organizations are putting in place a single leader to better align marketing, sales and customer success teams and the operations that support them, according to interviews with over 100 growth leaders in the book [Revenue Operations](#). To accomplish this, many organizations are putting operations in charge of creating a Revenue Operations Center of Excellence to coordinate cross functional team activities and develop core capabilities. “Growing revenue has emerged as the ultimate team sport,” according to [Peter Ford](#), the VP of Global Sales at iconectiv, a Private Equity backed company that offers solutions that enable the interconnection of networks, devices, and applications to the communications industry. “Selling to a digitally empowered customer across global markets requires much more communication and coordination across the revenue team and with the key stakeholders in product, marketing, and service organizations,” says Ford. “The role of the growth leader has evolved into an orchestrator of an increasingly complex marketing and technology ecosystem.” Ford put in management mechanisms and systems to break down communications roadblocks across sales, marketing, and service silos and accelerate the flow of critical information across customer-facing teams.

As part of this, their operations leaders are being tasked with mapping the cross functional commercial process to clarify roles, handoffs and key points of leverage, scale, customer abrasion, and revenue leakage. Best in class organizations are doing this to identify and eliminate the handoffs and points of failure in the customer journey that led to revenue and margin leakage by combining the commercial operations that support the customer journey across the enterprise. This creates a better operational picture of the complex variety of touchpoints, stakeholders, and hand-offs involved in the modern customer buying journey. For example, Scott Kelly, the SVP of Sales, Customer Success and RevOps at GHX and [Wade Burgess](#) the Chief Revenue Officer at Velocity Global are unifying all commercial operations under one leader to create a single operational view of the enterprise commercial process. This makes it easier to identify and eliminate handoffs, finger pointing, mis-allocations of effort, and opportunities with no owner that fall through the cracks. Burgess believes that traditionally marketing always blames sales for not converting their leads correctly, and sales always blames marketing for not enough leads. We're trying to be one team working together rather than fight one another over lead ownership and quality. Putting all operations under one owner creates one central point of truth to identify the key points of failure, leverage, and scale in the customer journey.

Level 2: Aligning customer facing marketing, sales and customer success teams along the revenue cycle to enhance collaboration, customer experience and client expansion. Consolidate the operations that support revenue teams to support the implementation of selling pod structures and Account Based Marketing (ABM) programs.

Operations leaders are being asked to develop KPI to measure the performance of the end-to-end commercial process across functions. For example the CEO of Avaya is aligning incentives across sales, marketing, and customer experience functions to ensure they are focused on corporate growth priorities and growing customer lifetime value. "An important aspect of getting sales, marketing, services, and customer success to work as one revenue team was to align incentives around a common set of strategic growth goals, reports Jim Chirico, the CEO of Avaya. "Aligning our incentives and KPIs with our overall objectives is extremely important to achieving our growth goals, especially as we move from a product company to a SaaS / cloud company," says Chirico. "It is important to make sure that those incentives are driving the right outcomes and behaviors and drive accountability through the process as well."

David Rabin, VP of Global Commercial Marketing at Lenovo views measuring the handoff between sales and marketing as critical to measuring the performance of the end to end performance across functions. While marketing can generally measure engagement in front of the funnel campaigns and events, his team is working to bridge the human handoff with technologies that capture selling activity and automate data entry into CRM to sales to connect those to selling outcomes. "There is a "moat" around marketing. There is still a human factor between marketing engagement and the sales outcome because a sales rep has to receive that lead, and code it into CRM, and give credit to a marketing action and verify it converts. There are thousands of solutions out there that can help us with that problem. We have no capacity to deal with tools that can help us. We simply can't get to them."

Level 3: Centralized stewardship of the entire revenue cycle, including ownership, design, documentation, implementation and measurement of the enterprise commercial process - and supporting all front and back office stakeholders in the product to cash cycle.

At the highest level of sophistication, operations leaders are being asked to reengineer the cross functional commercial process to eliminate friction, handoffs, delays, and revenue leakage. Jeff McKittrick, the AVP of Go-to-Market Systems and Strategy at Pure Storage, recommends revenue operations leaders should analyze and identify the key points of leverage and failure, and scale in their customer journey and sales process as a fast path for eliminating the biggest points of friction and revenue loss. "We conducted a sales activity analysis – a qualitative and quantitative survey of the entire revenue team. This allowed us to identify the top five to six hot spots in your sales process that take up salesperson time and gate revenue growth to focus our efforts. Then our Sales Operations, Sales Enablement, and Content Operations teams worked together to conduct a technology stack assessment and rationalization analysis to focus our sales technology portfolio on the places we needed to better leverage, automate, enable, and support these specific hot spots. This analysis identified many disconnected or duplicate capabilities, and technologies that were not supporting sales because they were either not being used or were not useful."

3

Forecasting and Reporting. Reporting pipeline performance reports and developing the sales opportunity, revenue and financial forecasts with finance. Revenue Operations teams are partnering with Financial Planning and Analysis (FP&A) organizations to gain greater control over the end-to-end processes for booking, reporting, and forecasting revenues to gain greater visibility into booking, revenues and changes and variances to the forecast. These elements of the Forecasting and Reporting role – current and future – are outlined below. Three levels of maturity are provided to help evaluate your commercial operations to identify key capability gaps and prioritize the most important ways an operations leader can move your revenue team to the next level of performance.

Level 1: Reporting pipeline and creating a sales forecast based on opportunities potential bookings based on CRM and other front office data sources.

Progressive finance teams are embracing the Revenue Operations strategy as a better way to align the organizations' processes and data across the core business groups to make forecasting more agile, transparent and precise over time – from the initial customer engagement to the receipt of cash – to maximize revenues, margins, and the lifetime value of the customer. Sixty-seven percent of finance executives believe the finance function should be better aligned with sales leadership to improve forecasting and maximize revenue growth. according to [a survey of senior finance executives by CFO Research](#). Two-thirds believe that better alignment between finance and sales leadership will lead to improved revenue forecasting and a 5% increase in revenue growth while simultaneously lowering both finance and sales costs by 5% and giving them greater control and compliance.

As part of this effort, operations leaders are being asked to develop predictive analytics capabilities to create more accurate sales forecasts and pipelines. This is because, leveraging AI and massive new sales data sets can significantly improve the accuracy, predictability, and quality of plan inputs. This includes curating and combining inputs and data sources into value-added analysis that derives better and more accurate planning inputs including estimates of sales rep capacity, productivity and profitability, sales forecasts, and opportunity potential. For example, Incentive Systems, which sells solutions to financial executives, is using sales analytics to validate and refine sales forecast accuracy by rolling up and validating data about pipeline and customer engagement from many different sources and systems.

Controlling front office problems early in the revenue cycle such as rogue discounting, poor account approvals, bad product fit, and wrong priorities can accelerate revenues and improve the return on selling investments. For example, 71% of senior financial executives think a more efficient pricing and approval process would substantially improve their organization's profitability according to the CFO Research study. In addition, eliminating downstream billing disputes and late collections can stem revenue leakage, shrinkage, and slippage between booked and realized revenues – which can exceed 5% of total revenues. For example, according to client research by Salesforce, automating the subscription billing process can help your organization reduce invoice disputes and the days it takes to collect cash by over 10%. Automating the quote-to-cash cycle can increase new business and renewal conversions by double digits.

Level 2: Revenue forecasting of ramp and run rate revenues over time applying revenue recognition rules on booked revenues, subscriptions and long term contracts and expansion potential.

Nearly two-thirds (65%) of senior financial executives report they are having operational problems establishing processes to track and manage and maximize revenues over the long term. And almost half (48%) of companies with a recurring revenue business model struggle to meet accounting and reporting challenges created by the dynamic customer relationship that dictates revenues must be recognized when realized and earned, not necessarily when received.

As a direct result, most (60%) Financial Planning and Analysis (FP&A) organizations are driving global process ownership of end-to-end processes for booking, reporting, and forecasting revenues. Their goal is to reduce process fragmentation across silos and standardize and harmonize the way information moves across the process. More than eight in ten (81%) financial professionals believe sales and finance would benefit from improved collaboration and better communication about customers and contracts according to a survey of financial professionals by [CFO Research](#). Thirty-one percent of CFOs are making it a high priority to integrate their finance processes from the back office to the front offices across organizational hierarchies according to a survey of 300 CFOs by the [Everest Group](#).

"The challenge of generating more precise revenue forecasts is not a data problem," says Haley Katsman, VP of Revenue at Highspot, who manages sales, success and enablement operations. "The data needed to create fact-based and reliable forecasts and accurate revenue recognition exists. The problem is the inability of organizations to share data between the front and back offices. The real sin here is every organization knows what is happening with their clients. Sales know things are slipping. Service and success teams know when there is going to be attrition. Account managers know that there are delays. Unfortunately, most finance organizations rely only upon opportunity data or a single stream of signals from the field when measuring, managing, and forecasting revenue performance. That's a mistake because they are failing to tap into the wealth of customer transaction, interaction, and engagement data their revenue teams and systems are generating."

Level 3: Adjusting revenue forecasts and recognition for expansion via cross sell, upsell or contraction through terminations, contract amendments and usage shifts

Financial leaders lack the visibility they need into the key signals of customer demand, consumption, retention, and expansion they need to effectively manage and optimize revenues. Managing and forecasting these sophisticated relationship structures and the associated usage and time-based revenue streams they create increasingly depends heavily on frequently changing customer variables at every stage of the revenue cycle – from upstream business development to downstream ACV, Churn and ARR calculations and run rate forecasts. There are dozens of variables that can confound the revenue forecasting process and generate significant reductions in the revenues realized after a customer commitment has been made. These include information about customer usage, onboarding, rollouts, adoption, consumption, renewals, and add-on services that is exchanged on a daily basis in ongoing customer interactions with front-office sales, account management, and service teams. “The data that feeds my revenue forecasting is my top issue because it comes from a fragmented set of sources and is inconsistent. If a vendor could come in and pull all the front office data together, harmonize it, and help me feed it into my control (ERP) systems that would be solving a huge problem for me.” -- Jessica Graziano, CFO US Steel

“It takes collaboration between finance, operations and sales to generate predictable and scalable revenues,” says Tim Brackney, President, and Chief Operating Officer of RGP. “Doing this right is a team sport. So, I work very closely with my account management teams and CFO to bridge the gap in information and ensure we have the information we need post booking to allocate resources, monitor rollout logistics and project timelines so we can recognize, adjust resource and revenues to reflect the reality in the moment.” Brackney continues, “My remit as COO is from opportunity to revenue recognition in that process. I hold my account managers and leaders accountable for that as well. The booking or close is a fulcrum event in the process that can cause problems. At that point account managers tend to “ring the bell”, take it to the bank, and assume the job is over and the revenue will ultimately come in. My sales leaders hold account managers accountable for closely monitoring any changes or extensions that can impact what revenue is recognized. It's every account managers job. Revenue means recognized revenue. And any write offs and AR is their responsibility. The reality is you need to constantly be “reclosing” a deal and constantly managing supply (inventory) with demand (billable work) to recognize those revenues and manage your profitability and return on assets.”

“We do number of things to improve our ability to manage, forecast and recognize future revenues on our large and complex contracts,” says Brackney. “I work closely with the CFO to combine this information to provide better guidance to Wall Street in earnings call. We bring two perspectives to the process of forecasting and recognizing revenues. I like to say if we are driving a car, I’m looking out the windshield optimistically looking at future revenues and expansion opportunities where she (the CFO) is more conservatively looking out the rear-view mirror and processes, and costs. It takes the combination of perspectives and information to make it work. And the glue is we are both accountable for growing return on assets, growing profits, and EBITDA. Since we’ve worked together, we’ve hit or exceeded our earnings guidance to investors for nine straight quarters.”

Commercial Architecture: Redeploying Assets to Improve Coverage, Control and Customer Experience at Lower Cost

COMMERCIAL ARCHITECTURE JOB DESCRIPTION



Redesigning the commercial architecture to maximize coverage, control, and the return on selling assets by improving the speed, visibility, productivity, and engagement of front line selling teams and reducing cost to sell.

COMPETENCY	LEVEL 1:	LEVEL 2:	LEVEL 3:
4.0 Go to Market Architecture Redesign the go-to-market strategy and sales force design to improve performance, engagement, costs and the customer experience	The design, management and execution of territory and quote plans and sales incentives to optimize market coverage and quota attainment at the lowest cost to sell.	Redesigning the sales force design to adapt to digital selling and enhance revenue team performance, including: the design, manage and execute territory and quota plans to maximize the productivity of all customer facing resources.	The design, management and execution of territory and quote plans and sales incentives to optimize market coverage and quota attainment at the lowest cost to sell.
5.0 Planning and Resource Allocation. Optimize the allocation of growth budgets, resources, and investments and support integrated growth planning with finance	Work with finance work together to reallocate seller resources and program budgets to the top accounts and markets and update the revenue plan to reflect customer, operational and market changes.	Work with marketing and finance to reallocate growth resources and investment and automate the planning process to more dynamically reflect changes in demand, market opportunity, account activity in the revenue plan.	Work with finance work together to reallocate seller resources and program budgets to the top accounts and markets and update the revenue plan to reflect customer, operational and market changes.

The Role of Revenue Operations In Redesigning the Commercial Architecture to Unlock Performance

The top growth leader in the organization needs to focus on three areas to redesign the commercial architecture to maximize return on selling assets by improving the speed, visibility, productivity, engagement of front line selling teams while reducing cost to sell. There are three core capabilities your organization will need to develop to unlock greater performance from your revenue teams to realize greater growth from existing resources.

4

Go to Market Architecture Redesign the go-to-market strategy and sales force design to improve performance, engagement, costs and the customer experience. Growth leaders are looking to redesign the go-to-market architecture to improve performance and engagement by rearchitecting market coverage, account targets and segmentation to realize more opportunity with existing selling resources and assets. These elements of the Go-to-Market Architecture aspects of the operations role – current and future – are outlined below. Three levels of maturity are provided to help evaluate your commercial operations to identify key capability gaps and prioritize the most important ways an operations leader can move your revenue team to the next level of performance.

Level 1: The design, management and execution of territory and quote plans and sales incentives to optimize market coverage and quota attainment at the lowest cost to sell.

Operations leaders are being asked to refine coverage to reflect the impact of new roles, teamwork, transaction automation and migration. For example, Peter Ford, the VP of Global Sales iconectiv believes digital selling technologies and advanced analytics give leaders greater freedom to deploy resources by releasing the constraints of geography in territory design and using algorithms to prioritize the account priorities, activities, and emphasis of sellers. “Geographical location is much less important now for a salesperson than it was pre pandemic,” according to Ford. “Of course, I would say that as the head of sales of a US corporation based in the UK - but we shouldn't underestimate the growing importance of time zone alignment in our sales coverage plan. I have members of my team on the West coast of the US on the East coast, myself in the UK, someone in Dubai and someone in Taiwan. You need some element of time zone alignment simply because you want the customer to be awake, but there is certainly an opportunity to use data and analytics to determine coverage, targets, and priorities.”

Operations leaders are testing the assumptions underlying territory definitions and quota assignments to ID ways to better align resources with opportunity. There are an infinite number of product, client, coverage, and effort scenarios that go into defining territory boundaries and sales quota assignments for reps. It is difficult for sales operations teams to model all the different variables that go into the TQP process using manual spreadsheet based processes. The combinations of product emphasis, engagement patterns, customer priorities, treatment models, roles, and coverage breadth can be infinite. But different scenarios can yield very different financial results in terms of opportunity attainment, cost to sell and margins. Advanced analytics and modeling tools make it faster and easier for the sales team to test existing assumptions or adapt them to changes in customer behavior or market potential. “An important role for AI and Machine learning tools is to create better predictions, parameters, and scenarios to inform decisions about where to apply investment, sales resource allocation, and sales force emphasis, according to Ron Cline, Head US Marketing Data and Analytics at the TD Group. “Machine Learning and AI tools and modeling techniques allow us to analyze more data sources, faster, with more statistically valid results, and less work.”

Operations teams are also redefining territory boundaries and quota assignments based on more precise data driven inputs to reflect changes in business model, automation, selling cadence, engagement mix, and customer behavior. Digitizing the process of planning, managing, and optimizing territory boundaries, seller targets and quota assignments will make it faster, less expensive and more data-driven, accountable, and collaborative. This includes streamlining the planning and design of territories and quotas, providing more visibility into performance against goals, and speeding up the process of making mid-period adjustments and plan reviews. For example, Frank Jules, President AT&T embraces using analytics to adapt his coverage and territories to changing customer demand and market response. “We’re shifting to a more science-based territory definition within the vertical structure,” according to Jules. “We have a sales operations team that runs analytics on things like the cost to serve an average client, what coverage models perform best, how quotas should be constructed by industry, and ultimately how we should compensate. This ties to our vertical focus because we’re constantly rebalancing our allocation of resources and effort based on industry data. Is the healthcare, manufacturing, or hospitality vertical up or down? With Covid, our coverage and quotas have been disrupted. Transportation, hospitality, and airlines are struggling. At the same time, we knew that certain

industries--like public sector and healthcare--were set to explode. Being data driven lets us set fair quotas based on competitive analysis and trends. This helped us turn on a dime early-on and figure out where we should double-down on resources and where we could lighten up on industries that were having a tough-go."

Level 2: Redesigning the sales force design to adapt to digital selling and enhance revenue team performance, including: the design, manage and execute territory and quota plans to maximize the productivity of all customer facing resources.

85% of the CXOs interviewed in the book *Revenue Operations* are actively redefining sales force roles, assignments, customer treatment models, and targeting priorities to improve selling performance, realize more market opportunity, and growth customer lifetime value. This is because optimizing territory design by matching territory size with revenue and profit growth opportunities. can increase sales by 2 to 7% and reduce selling costs by 10-15% cost reduction without any change in total resources or sales strategy, according to the book *Revenue Operations*. They are adding development reps (SDRs, BDRs, MDRs, and ADRs) to manage engagement at scale at the front of the funnel, specialists to add value in the middle, and Customer Success Managers (CSM) at the end to manage retention, usage and upsell. To make full use of these assets, growth leaders must adjust the sales force design to improve performance, engagements and costs by reconfiguring sales force segmentation, emphasis, compensation, and development strategy to maximize engagement, speed of response, productivity, and sales outcomes. So operations leaders are being asked to redesign the Sales Force emphasis rebalance product, engagement, and activity priorities to optimize performance, margin, and customer lifetime value. They are building sales force optimization models that help management to optimize many variables - the size, segmentation, and emphasis of the sales force, the design of territories, the segmentation of markets and the treatment of customers – to generate the plan with the greatest sales force effect. Sales force optimization models make it faster and easier for the many stakeholders in the organization to balance their individual needs to meet the collective goal of growing share, revenues and profits set out by leadership. They can also have a significant impact on the sales outcomes, revenues and profits generated per hour of selling effort. For example, a pharmaceutical company used this approach to create a much more accurate sales response function parameters for sales force modeling. Through a series of modeling exercises, they were able to arrive at a consensus plan that allowed them to drive \$25 million in marginal sales contribution by changing the size and deployment, and emphasis of their sales force. In particular, the collective judgment of the management team helped them to refocus their product emphasis on products that were contributing more to margins and customer lifetime value.⁴⁸

For example, Pitney Bowes and other leaders are tuning their go-to-market strategy to realize opportunities to capture more share and opportunity. Bill Borrelle the CMO of Pitney Bowes has been part of a leadership team that has been working to transform the company from a mailing solutions company into a growth business that offers market leading mailing, shipping, e-commerce logistics and financial services solutions. The growth leadership at Pitney Bowes had to make some dramatic changes to their go-to-market approach and a major shift in sales force focus, emphasis, and roles to accelerate sales of new solutions. Bill Borrelle the CMO partnered with his peers in field sales and inside sales to refocus their go to market resource on new products, transaction types, and stages of the customer journey to ensure the business was creating channel efficiency and allocating the best-selling resource to the biggest opportunity. "We've focused salespeople on more complex and valuable transactions because the simpler transactions – a client buying supplies, a single piece of equipment that they will install themselves, or a lease renewal – can happen online," reports Borrelle. We need our valuable sales team working on complex transactions like an enterprise client that spans many locations. "From an execution standpoint, segmentation and market sizing helped to understand the opportunity, and where to focus. For example, shipping clients will have more complex workflows, a greater mix of inbound and outbound volumes and bigger packages. We had to get more precise, and data driven to identify opportunities. We're starting to use data and analytics to create a new type of "selling book". We're also using IoT data from our equipment to look at usage, volume, size of package, and industry to better value, segment, and align selling messages and channel assignments."

Level 3: The design, management and execution of territory and quote plans and sales incentives to optimize market coverage and quota attainment at the lowest cost to sell.

"In the short term, sales organizations are deploying algorithms that help with the basics of account prioritization, lead qualification, recommending the content or sales action that will lead to success, and reallocating sales resources to the places they can have the most impact," reports Leonard Lodish, Professor of Marketing at the Wharton School of Business. "More sophisticated organizations using AI tools can also create algorithmically-derived customer response models to help take the guesswork and gut feel out of aligning sales resources across geographies, accounts, and business lines." For example, Steve Lucas, the CEO of iCIMS, is focusing his revenue team on customer lifetime value by pushing his team to clearly define and

quantify what a good client relationship looks like empirically on a scale of one to ten. He kept the bar high on engagement quality. Any account team with a customer engagement score less than 9 had to take a series of actions to improve customer health. In parallel, he created a tightly defined customer persona called an Ideal Customer Profile (ICP). He created a vocabulary, criteria, reporting, and most importantly financial incentives for his go to market teams to develop relationships with these “ideal customers”. To enforce this discipline of delivering high quality customer engagement to the highest potential customers, his teams were paid 20% higher commissions when they engaged and developed “ideal” customers. They were paid 20% lower commissions when they spent their energies on less than ideal prospects.

Other operations teams are being tasked with creating common measures based on account and pipeline health for all customer facing employees. For example, Frank Jules, President AT&T, created Total Billed Revenue (TBR) as a common measure of account and pipeline health for all customer facing employees. “At the end of the day, Total Billed Revenue (TBR) is our biggest incentive because it looks at the whole picture and helps us grow our accounts,” reports Jules. “As a comprehensive metric, it gives our reps the flexibility and incentive to manage accelerating product life cycles, new product introductions, product expansions, and product sunsets — all while retaining the business we have. At the end of the day, we expect our reps to figure out a way to grow. TBR is the measurement that best guides them. This also fits with our strategic focus on NPS as a critical driver of revenue, EBITDA, and EPS growth. It motivates our revenue teams to focus on customer lifetime value. Most of our revenue is under contracts. So, every year you have contracts up for renewal. Our customers can choose to change out their networks, mobility suppliers, and wireline suppliers. So, without strong customer satisfaction, we’re not going to achieve our revenue goals.”

5

Planning and Resource Allocation. Optimize the allocation of growth budgets, resources, and investments and support integrated growth planning with finance.

Growth leaders must adjust the sales force design to improve performance, engagements and costs by reconfiguring sales force segmentation, emphasis, compensation, and development strategy to maximize engagement, speed of response, productivity, and sales outcomes. These elements of the Sales and Marketing Operations role – current and future – are outlined below. Three levels of maturity are provided to help evaluate your commercial operations to identify key capability gaps and prioritize the most important ways an operations leader can move your revenue team to the next level of performance.

Level 1: Work with finance work together to reallocate seller resources and program budgets to the top accounts and markets and update the revenue plan to reflect customer, operational and market changes.

60% of organizations are pursuing data-driven selling approaches to optimize resource allocation, according to interviews with over 100 growth leaders in the book Revenue Operations. Steve Lucas, the CEO of iCIMS believes the best way to manage and allocate sales resources is to be clear on the actions, activities and engagement mix that drives customer health and lifetime value. He pushes his revenue leaders and teams to define engagement metrics that best describe customer engagement quality and the optimal allocation of selling effort within their unique business model. “The scorecard for successful customer engagement is different for different business models. But the principles will be the same,” according to Lucas. “The key is to develop a universal customer engagement quality score that defines engagement excellence for all customer facing employees.” Peter Ford, the VP of Global Sales of iconectiv, was able to leverage analytics to “cut the tail” by becoming more scientific about prioritizing customers based on readiness and potential and enabled different levels of customer treatment to manage cost to sell in smaller “tail” accounts. “We use analytics to create the curve of our customers,” relates Ford. “Much like every other technology business, I have a relatively small number of high spend customers who purchase almost every single one of our products. And then we have a long tail of much, much smaller customers. We can't manage all of those customers in the same way from a sales perspective. So, we treat a customer that generates less than \$10,000 of revenue for us a year differently than a customer that generates in excess of \$20 million a year. Understanding when to take a light touch approach versus hands-on sales or when an account should be more marketing driven is key.”

Level 2: Work with marketing and finance to reallocate growth resources and investment and automate the planning process to more dynamically reflect changes in demand, market opportunity, account activity in the revenue plan.

Jeff McKittrick, the AVP of Go-to-Market Systems and Strategy at Pure Storage emphasizes that the absence of physical limitations gives organizations the opportunity to leverage experts and expand coverage beyond traditional geographic, territory and functional constraints and put the best resources in the best spot to advance a deal. “Expertise within a sales organization is often siloed and not broadly available or leveraged across teams,” states McKittrick. “In traditional selling models, these experts are accessed via inefficient methods like email lists and various messaging apps within an organization. When an expert provides the answer to a question, it is usually provided only to the person who asked the question vs. a central, searchable repository where it can be leveraged by the entire organization. Digital selling platforms can break down these walls by taking advantage of technologies that facilitate information sharing and provide more of a “Google-like” experience to finding experts and information in specific context to a company’s technology and solutions.”

“Too much of sales and revenue planning is based on lagging indicators and historical data,” says Michelle Sidwell, VP of Enterprise of SalesLoft. “In our experience, the customer engagement data we generate from the sales engagement and enablement systems used by our sellers provides a powerful set of signals to help manage and plan our revenues. We are increasingly using this data to give our leadership and finance teams better leading indicators on future revenues. The more you can incorporate actual client engagement data into the sales forecasting process, the more adaptive and precise your forward-looking measurements and KPI will be.”

Level 3: Work with finance work together to reallocate seller resources and program budgets to the top accounts and markets and update the revenue plan to reflect customer, operational and market changes.

63% of CFOs by making it a priority to leverage analytics and improve data management to improve visibility and drive insights according to [a survey of 300 CFOs](#). A big reason the finance function is becoming more data-driven is that modern revenue streams are more and more impacted by information and events that occur after the revenue is booked. There are dozens of post booking variables in a recurring revenue model that can confound revenue forecasting and lead to significant changes to revenues and margins as customers and markets change. Information about how the promises and agreements made to the client at booking change over time. And how well the business is delivering those promises to the client - in terms of service delivery or consumption, contract amendments, extensions, or delays to onboarding, training, and other milestones – now have a big impact on revenues. This customer engagement and account-level information is essential to informing and updating revenue forecasts, recognition, and realization. Revenue Operations is a key partner to provide better visibility into this key information because they are generated from a mix of customer-facing systems, channels, and touchpoints in the front office. And most of this information is invisible to traditional ERP and Accounting control systems.

Developing revenue forecasts and plans in an environment of increased market uncertainty combined has compounded the problem to make it exceptionally difficult for finance teams to accurately plan and forecast future revenues in an increasingly uncertain market. “The notion of financial revenue forecasting and future revenue recognition is a hot issue for everyone right now given the uncertainty in the macro environment, particularly in industries like manufacturing and professional services where managing capacity, inventory and fulfillment assets are so critical,” according to Tim Brackney, the President and Chief Operating Officer at RGP (Nasdaq: RGP), a publicly traded professional services firm.

To keep adapt to market changes and uncertainty, most (57%) senior financial executives are actively accelerating their forecasting processes in the face of market opportunity, demand swings, and economic headwinds, according to a survey of 551 CPAs in leadership roles by [the Association of International CPA's \(AICPA\)](#).

Commercial Insights: Turning Big Data into Actionable Insights that Create Value and Visibility in Real Time

COMMERCIAL INSIGHTS JOB DESCRIPTION



Using advanced analytics to turn customer engagement data into commercial insights that inform selling priorities, decisions, actions, and conversations and optimize the allocation and return on growth resources, assets and effort.

COMPETENCY	LEVEL 1:	LEVEL 2:	LEVEL 3:
6.0 Data Driven Selling. Analyze data from across departments to better inform customer targeting and prioritization, guided selling and coaching, and personalization at scale	Analyze customer data from across departments to inform targeting, account prioritization, territory design, and day to day allocation of selling resources and efforts.	Analyze customer data from across departments to inform selling decisions including: next best selling actions, recommender models that suggest next best offers, content and product and, and identify coaching and development priorities.	Analyze customer data to support 1:1 personalization at scale including personalized content for ABM programs, dynamic messaging, localization, and 1:1 coaching in real time.
7.0 Performance Measurement. Establish fact-based reporting analytics and KPIs to measure commercial performance and inform the allocation of growth investment, resources and effort.	Analyze customer data from across departments to provide better visibility into leading indicators of performance along the entire revenue cycle, including measures of account health, pipeline activity, seller performance and forecasted revenues.	Analyze customer data from across departments to provide better visibility into the customer experience and account health and establish financially valid measures of the return on commercial investment and customer lifetime value.	Establishing financially valid measures of the performance of the end-to-end commercial process and create common incentives across functions based on customer lifetime value, cost to sell, and contribution to firm financial performance.

The Role of Revenue Operations In Turning Customer Data into Commercial Insights

Growth leaders need to focus on taking three steps to turn their customer engagement and seller activity data into commercial insights that create value and inform decisions, actions, and conversations at the "moments that matter" in the human selling process. There are three core capabilities your organization will need to develop to improve your performance and realize greater growth from existing resources.

6

Advanced analytics that leverage customer insights to inform customer targeting, guided selling, and personalization at scale. Convert revenue data into prescriptive revenue intelligence that informs day-to-day decisions in real time using analytics to support data driven selling by better aligning selling resources and assets with opportunity and routing intelligence to front line sellers in real time to support decision-making, actions and conversations at the moments that matter in the customer journey. These elements of the Advanced analytics aspects of the operations role – current and future – are outlined below. Three levels of maturity are provided to help evaluate your commercial operations to identify key capability gaps and prioritize the most important ways an operations leader can move your revenue team to the next level of performance.

Level 1: Analyze customer data from across departments to inform targeting, account prioritization, territory design, and day to day allocation of selling resources and efforts.

Growth leaders need to use advanced analytics to create better predictions, parameters, and scenarios to inform investment, allocation, and emphasis and develop more accurate and predictive estimates of opportunity potential, sales forecast accuracy, customer response, intent, and fit with sellers, products, and treatment types. Many organizations are establishing analytics centers of excellence for developing predictive insights and advanced modeling capabilities. For example, [Kirsten Paust](#), VP Fortive Business Systems has put together a center of excellence to develop and share advanced analytics capabilities across the businesses in the Fortive portfolio. “Advanced analytics is a force multiplier that the Fortive Business Systems Office is putting to work, reports Kirsten. “To help apply the power of analytics as a growth enabler, Fortive has developed a data science team, called The Fort, is a team of highly skilled researchers and analysts who are building and deploying business models across our businesses that are changing the way we do business.”

As part of their emphasis on using analytics to inform targeting, account prioritization, and day-to-day allocation of selling efforts, operations teams are being asked to develop analytic models to predict opportunity value, intent, win probability, fit and coverage difficulty. Over half of CXOs interviewed in Revenue Operations are using commercial insights to dramatically sharpen the targeting and focus their selling resources. For example, [Peter Ford](#), the VP of Global Sales of iconectiv, was able to leverage analytics to “cut the tail” by becoming more scientific about prioritizing customers based on readiness and potential. This information enabled different levels of customer treatment to manage cost to sell in smaller “tail” accounts. To do this, their operations teams are developing highly accurate propensity-to-buy targeting models using existing CRM and transaction data that will more accurately predict which customers are going to buy from you, with the least selling effort are seeing near term gains of 20% or more in conversion, sales quota attainment, and account development. “In the absence of analytics that quantify account potential and propensity to close, most organizations chase too many low-quality clients and opportunities – ones where they stand little chance of winning but want to feel like they are still in the game, according to Cam Tipping, Managing Director of Sales Effectiveness at the Revenue Enablement Institute, who has led over 100 customer targeting workshops and even more simulations with sales teams over the last decade. “This behavior leads to bad outcomes – like bad service, high cost to sell, lower margins, and unsatisfied clients. It’s a basic 80/20 problem. But a difficult one to solve. No business that I have seen is aware of this issue until they go through the analytics to understand it,” continues Tipping.

Level 2: Analyze customer data from across departments to inform selling decisions including: next best selling actions, recommender models that suggest next best offers, content and product and identify coaching and development priorities.

Operations teams are being asked to develop predictive analytics capabilities that allow finance and sales leaders create more accurate sales forecasts and pipelines. This is because leveraging AI and massive new sales data sets can significantly improve the accuracy, predictability, and quality of plan inputs. This includes curating and combining inputs and data sources into value-added analysis that derives better and more accurate planning inputs including estimates of sales rep capacity, productivity and profitability, sales forecasts, and opportunity potential. For example, Incentive Systems, which sells solutions to financial executives, is using sales analytics to validate and refine sales forecast accuracy by rolling up and validating data about pipeline and customer engagement from many different sources and systems.

Another way operations teams are being asked to analyze customer data from across departments to inform selling decisions is to use AI tools and models to enable real time guidance across revenue teams. This is because AI enabled real time guidance helps development reps, account reps and customer success managers much more effectively. Sales leaders need to increase the speed of communication by providing real time training and guidance to help front line sellers respond immediately and completely to “new school” buyers and follow-up on signals of buyer intent or attribution while they still have time to impact the outcome. Wade Burgess, the CRO of Velocity Global sees real time customer analytics as a way to change the company’s historic focus on new customers to cross selling and upselling existing customers into enterprise accounts. “Analytics can also help us retain and expand those enterprise relationships,” he continues. “For example, if an account has X amount of revenue forecasted for the year, but they’re tracking above that number, a person on our team needs to be triggered to reach out and have that conversation with him to be able to do some kind of an add-on or to upsell them or to whatever needs, whatever the appropriate action is. On the other hand, if utilization is way behind and we’re three months into an annual contract, I want customer success reaching out right now to be able to get that back on track. So, they don’t churn like none of that’s happening today. So that’s only activity-based data. That’s just a gold mine that we are not tapping into.”

Level 3: Analyze customer data to support 1:1 personalization at scale including personalized content for ABM programs, dynamic messaging, localization, and 1:1 coaching in real time.

Operations leaders are being asked to centralize commercial technology investment prioritization and implementation across all functions based on value, simplicity, and impact. This is because success in a 21st Century Commercial Model requires shared investment in commercial assets that enable sales – technology, data, digital channels. A unified capital expenditure and operating model is needed to execute scalable technologies like 1:1 personalization at scale, coaching at scale, Account Based Marketing (ABM) at Scale, and cross functional customer journey management. Mike Marcellin, the CMO of Juniper Networks reinforces the need to make technologies scalable to more accounts and revenue team members. “For ABM investment to really pay off it needs to scale,” reports Marcellin. “With our pivot to the broader enterprise market, the challenge is to use technology, process, and personalization to deliver that level of personalized service to thousands of stakeholders in thousands of accounts. To become more scalable, we have done many things: building a data science team to increase our focus on advanced analytics needed to build a customer data repository to support ABM at scale, ensuring we have a state-of-the-art martech stack, and massively ramping up our demand generation efforts.”

7

Establish fact-based reporting analytics and KPIs to measure commercial performance and inform the allocation of growth investment, resources and effort.

CXOs need to establish fact-based reporting analytics, KPIs and dashboards of commercial performance. Key metrics and indicators align sales, marketing, and service around common objectives, goals, KPIs, priorities, incentives and provide visibility into buyer engagement, seller activity, account health and pipeline potential. These elements of the measurement and reporting analytics role – current and future – are outlined below. Three levels of maturity are provided to help evaluate your commercial operations to identify key capability gaps and prioritize the most important ways an operations leader can move your revenue team to the next level of performance.

Level 1: Analyze customer data from across departments to provide better visibility into leading indicators of performance along the entire revenue cycle, including measures of account health, pipeline activity, seller performance and forecasted revenues.

Most growth leaders interviewed in this study have initiatives planned or under way to use AI to improve their customer journeys, revolutionize how they interact with customers and deliver them more compelling experiences. For example, gaining visibility into the end-to-end commercial process is the key for John Jacko, the Chief Growth Officer of Pentair. “Visibility is a big priority to our organization as we seek to digitize the end-to-end process and use technology as a force multiplier to make our sales teams and partners more productive,” says Jacko. “My view is visibility into granular sales activity and voice of the customer data is critical to getting sales, marketing, and channel partner teams working together. This includes improving the effectiveness of our partners, improving the visibility and ease of doing business with Pentair, and allocating resources to the best product, market, and client opportunities with a high degree of precision, all in the name of growth.”

The Marketing and Sales leadership at Ciena Network were able to integrate data from sales enablement and operations, marketing, and sales to create a dashboard that gives growth leaders a dynamic and digital picture of what is going on in the account, Jason Phipps, the Chief Revenue Officer of Ciena Network. “We are able to answer critical questions like – are we engaging at the right levels in the organization? And are those stakeholders attending webinars, participating in “Demo days,” or downloading materials? We’ve had to combine data from a variety of data sources showing how different players on our revenue team are engaging with the key stakeholders in the account – from CEO to engineering.”

Level 2: Analyze customer data from across departments to provide better visibility into the customer experience and account health and establish financially valid measures of the return on commercial investment and customer lifetime value.

Operations teams are being tasked with refining and helping the organization agree with and deploy market segmentation supported by more precise algorithmic models of opportunity. For example, John Jacko, Chief Growth Officer, Pentair views more precise algorithmic models of customer demand and opportunity potential and the attainability of markets as a big advantage. “Our segmentation exercise brought the customer, their insights, and their journeys right into the room with us and stopped people’s individual stories of what they thought was the answer. Data wins and this was a real cultural shift,” reports Jacko.

Operations teams are also being asked to create data-driven measures of customer lifetime value, account health, seller performance, and opportunity potential to aid the redesign of sales incentive compensation to create common purpose and focus on customer value across functions. For example, the Sales and Marketing leaders of Ciena network changed their traditional demand generation metrics – MQL, SQL – because they were not effective or relevant to developing very deep customer relationships and managing a long (9 month or more) sales cycle. “What we really care about is moving the needle within an account – focusing on the next RFP or engaging more deeply with the key stakeholders - to open up different areas of the account or diversify the business strategy within the account,” according to Jason Phipps, the Chief Revenue Officer. “So, we’ve developed customer engagement reporting and Quality of Engagement (QOE) measurements that give us a more complete and real time picture of the breadth, depth, and frequency and impact we are having on our customers. Our longer-term vision is to be able to create a highly accurate QOE score of every account on a scale of 1-10 based on the level of engagement across the account. Sales folks are measured on quota attainment right now. But we want to look at the funnel on the breath of the engagement as another way to measure the sales leader on a major account as well.”

Sales and marketing leaders are taking the first steps to align their metrics and incentives with the activities and behaviors that lead to commercial outcomes, customer lifetime value, and account health. They are using advanced customer engagement analytics and sales AI to create customer engagement metrics to serve as the foundation for performance measurements based on real-time information about sales engagement, deal attractiveness, content usage, and persona-level interactions to provide management a more accurate proxy of the current buying reality. For example, using advanced customer engagement analytics and sales AI to create measures of customer engagement quality were fundamental to helping DHL transform the way they sell, according to Ton Verleg, the VP Global Sales Development at DHL. “We changed the way we sell and for that you need to be armed with relevant data and insights,” relates Mr. Verleg. “The analytics and AI give us unprecedented visibility into the opportunities and provides actionable next steps for our sales executives to sell with the buyers perspective, helping customers be more successful.”

Level 3: Establishing financially valid measures of the performance of the end-to-end commercial process and create common incentives across functions based on customer lifetime value, cost to sell, and contribution to firm financial performance.

While many organizations are able to collect first party customer data in marketing and sales engagement data in selling channels, it will take a unified approach to commercial operations to make it practical to aggregate, operationalize and act on it in ways that enhance the customer journey according to Jaime Punishill, the CMO of nCino. “The end state vision where data and technology enable one sales and marketing motion looks really good on paper” says [Punishill](#). “But if sales and marketing want to work together on a common customer journey they will need to define and agree on common objectives, processes, incentives and shared accountability. The way B2B firms have historically measured marketing funnel vs. sales pipeline and leads will have to evolve dramatically to support a seamless customer journey and the complexities of engaging many stakeholders using many touchpoints across a large number of accounts.”

Like most advanced commercial organizations, [Elango R](#), President of Mphasis uses measures of account health as the basis of measuring, motivating, and allocating team resources as customer lifetime value becomes a business model focus, and the customer experience defines competitive advantage with B2B buyers. When it comes to account health, two KPIs matter most to Elango – Net Promoter Score (NPS) and account growth. “Our NPS is the highest in the industry,” he shares. “In our experience, the keys to generating industry leading NPS is to understand two critical factors of execution - meeting the service level agreement (SLA) and meeting the emotional needs of the client.” According to Elango, as long as you are relevant to your customer, and you're creating an experience that emotionally stays with them, they will continue to grow with you. “We like to say we give our Horizon one accounts 120% focus – 100% to deliver and support the NPS and 20% more to build that perception of relevance with them,” Elango continues. “Using this approach, Mphasis has been able to win large deals of greater than \$20 million in total contract value (TCV) year over year and grew average TCV in their key accounts from \$2million to over \$25 million in the last four years.”

Commercial Enablement: Turning Technology into a Force Multiplier that Simplifies and Speeds Selling

COMMERCIAL ENABLEMENT JOB DESCRIPTION



Building a common core of commercial capabilities that enable, develop and retain front line revenue teams and maximize their contribution to revenue and profit growth and expanding customer lifetime value at every stage of the revenue cycle

COMPETENCY	LEVEL 1:	LEVEL 2:	LEVEL 3:
8.0 Enablement and Engagement. Design, deploy, integrate and manage systems to simplify the day to day selling workflow and enhance revenue team engagement.	Define, acquire, deploy and manage sales enablement systems that enables human engagement via sales channels and catalog, manage and deploy commercial selling content that supports sellers.	Integrate sales enablement, engagement and CRM solutions into a Digital Selling Platform to streamline and simplify the day to day seller workflow and improve speed, engagement and time focused on the customer.	Fully integrate sales enablement, readiness and engagement to support data-driven guided selling, prescriptive insights, and one to one coaching in real time.
9.0 Sales Training and Development. Design, deploy, integrate and manage sales training and development systems to better support sales readiness and development	Develop, manage and execute sales training programs, content and systems. Assess sales talent, and enable the ramp, development and retention of sales reps.	Reconfigure and connect the enterprise sales enablement, training, and development technology portfolio into an integrated and closed loop process that provides feedback, reinforcement and visibly into seller activity and compliance	Consolidate and integrate enterprise sales enablement, training, and development systems, data and content to support data-driven coaching at scale in real time and optimize the sales rep recruiting, ramp, and retention process across the organization.
10.0 Quote to Cash Operations. Design, deploy, integrate and manage to enhance the lead-to-cash cycle and capture more revenue, margin, and price.	Design and enable systems, rules, and operations to configure, quote, and approve deals, enforce pricing, discounting, and terms and ensure the fit, viability, and potential value of customers.	Integrate the roadmap to CPQ, billing and fulfillment tools to accelerate the lead to cash cycle, reduce revenue leakage, optimize price, and give finance greater control over margins, and better visibility into revenue recognition over time.	Automate the quote to cash process to extend financial control into the front office to investigate conflicting data sources and errors to better identify, diagnose and remediate problems leading to revenue leakage, variances, billing disputes and discrepancies on booked business.

The Role of Revenue Operations In Building a Common Core of Commercial Capabilities

Growth leaders are taking three steps to build a common core of commercial capabilities that enable human selling and maximize the contribution of selling assets and investments to revenue and profit growth outcomes. There are three core capabilities your organization will need to develop to improve your performance and realize greater growth from existing resources.

8

Enablement and Engagement. Design, deploy, integrate and manage systems to simplify the day to day selling workflow and enhance revenue team engagement.

Reconfigure the commercial technology infrastructure to better support revenue team enablement by enabling front line revenue teams with the intelligence, content, leverage, and guidance they need to focus more time on the customer, prioritize the best opportunities and take the actions that will advance opportunities and grow customer lifetime value. These elements of the sales enablement aspects of the role – current and future – are outlined below. Three levels of maturity are provided to help evaluate your commercial operations to identify key capability gaps and prioritize the most important ways an operations leader can move your revenue team to the next level of performance.

Level 1: Define, acquire, deploy and manage sales enablement systems that enables human engagement via sales channels and catalog, manage and deploy commercial selling content that supports sellers, including: playbooks, competitive, validation, thought leadership content.

60% of organizations are pursuing data-driven selling approaches to augment their seller performance and recommend next best action/content, according to interviews with over 100 growth leaders in the book [Revenue Operations](#). An increasingly common practice to achieve this goal is to integrate sales enablement, engagement and CRM solutions into a “Digital Selling Platform” to streamline and simplify the day-to-day seller workflow and improve speed, engagement and time focused on the customer. Growth leaders are asking their operations teams to “knit together” the various pieces of their sales technology portfolios to build digital selling platforms that automate, simplify, and speed up selling by addressing the major hot spots in the selling process, according to Jeff McKittrick, who has led sales enablement at Cisco, Hitachi, Pure Storage and WalkMe over the past fifteen years. “Organizations are eliminating points of failure, friction and manual labor in the day-to-day seller workflow by connecting these dots across CRM, sales enablement, sales readiness and digital asset management solutions - which are largely managed in silos in most business to business organizations. This can dramatically improve the productivity and experience of sales reps.

Christian Smith, CRO of Splunk is pushing this team to better connect the various solutions in his enablement ecosystem to find ways to deliver the right sales plays and training assets more prescriptively to reps in real time. “Today the selling assets are all there,” reports Smith. “Our team can find what they need because it’s all in our playbooks, which are all in our CRM system, and also in our knowledge portal. But you have to go and get them, which is optional, self-service, and manual to some degree. And nothing is driving you to do that. We’re not effectively suggesting what you should do next. I think we’re missing the opportunity to drive that consistency. For example, a rep is at a particular sales stage and they’re going to go look at a list of activities such as workshops they can conduct, or whether to do a business value assessment, or a data source assessment. These are important things that we do. But the rep has to actually click to expand it and ask themselves should I do those things? Then they have to go somewhere else to learn about them. And then go watch a bunch of videos to figure out how do you actually present these the right way.”

Level 3: Fully integrate sales enablement, readiness and engagement to support data-driven guided selling, proscriptive insights, and one to one coaching in real time.

Improving seller productivity requires sales leaders to connect the dots across their sales and marketing ecosystem to get their technologies to work together to better support their day-to-day selling activities and create value in the “moments that matter” in the customer journey. The growth leaders interviewed in this analysis were actively “knitting together” the various pieces of their technology portfolios to build digital selling platforms that automate, simplify, and speed up selling by addressing the major hot spots in the selling process. For example, HPE which sells software and services to large enterprises across 150 geographies,

found better ways to combine sales force automation, analytics, and AI enablement coaching from their sales engagement platform with a legacy Salesforce CRM and call center technology to dramatically improve seller engagement, productivity, speed, and visibility. This combination of capabilities removed many of the obstacles facing the inside sales reps tasked with local presence selling in critical geographies. As an outcome these inside reps were able to generate 400% more sales opportunities in their calls.

The most advanced organizations are integrating their sales enablement, CRM and engagement to support data-driven guided selling and prescriptive insights in real time. Operations teams are being asked to put in place end-to-end platforms that use AI to connect the dots across the entire sales and marketing technology ecosystem to help front line revenue teams prioritize, prepare, and execute effective sales calls. These platforms will combine customer engagement data from actual seller conversations with other engagement and activity data from CRM, email, calendar systems and third-party buying signals to create a complete picture of seller activities, behaviors, and conversations. And they integrate with other key assets in the growth technology ecosystem – CRM, sales enablement, videoconferencing – to share information to customer-facing employees on the revenue team.

“As sales enablement, engagement and training platforms evolve and converge they provide more support at the different steps in the seller workflow, says Greg Munster, “In my experience executing digital selling platforms at Red Hat and now Canonical, the thing that distinguishes successful enablement initiatives from the ones that fail is the ability of operations leaders to knit together and build out these different blocks to create a more uniform user interface and simplified user (seller) experience. One where the user (seller) doesn’t have to deal with a bunch of disparate tools that all have different user interfaces.” “Our Sales Operations, Sales Enablement, and Content Operations teams worked together to conduct a technology stack assessment and rationalization analysis,” reports Jeff McKittrick, who led the team that established the Digital Selling Platform at Hitachi. “First we conducted a sales activity analysis – a qualitative and quantitative survey of the entire revenue team. This allowed us to identify the top five to six “hot spots” in the seller workflow and focus our sales technology portfolio on the places we needed to better leverage, automate, enable, and support these specific hot spots. This analysis helped our team prioritize capabilities and tools that needed to be upgraded to fill in the areas their technology is not effectively supporting the key sales hot spots. For example, we added sales engagement tools to our roadmap to provide better opportunity prioritization and guided selling to salespeople because pre-call planning was taking up so much of their time.”

“The next step of our evolution to a digital selling platform was to focus on better utilizing the solutions we already had or getting rid of them,” McKittrick continues. “We measured user adoption by connecting all the critical tools and capabilities to a digital adoption software package that makes it easy and fast to discover and use all the tools available to them. This proved to be a simple and highly profitable exercise. We learned that while we had “pockets of adoption” across the revenue team, no single sales rep or manager was aware of all of the tools we already had. More importantly, from a business case and value perspective we realized that a little adoption goes a long way when it comes to leveraging selling tools and resources.



Sales Training and Development. Design, deploy, integrate and manage sales training and development systems to better support sales readiness and development

CXOs need to reconfigure the readiness, training, and development technology portfolio to integrate learning and development tools into a closed loop process that accelerates onboarding and ramping of revenue teams, provides managers real time visibility into seller activity and performance, and the ability to coach at scale. These elements of the training and development aspects of the role – current and future – are outlined below. Three levels of maturity are provided to help evaluate your commercial operations to identify key capability gaps and prioritize the most important ways an operations leader can move your revenue team to the next level of performance.

Level 1: Develop, manage and execute sales training programs, content and systems. Assess sales talent, and enable the ramp, development and retention of sales reps.

50% of organizations are consolidating the enterprise sales enablement, training, and development processes and systems, data and content that support them, according to interviews with over 100 growth leaders in the book *Revenue Operations*. As part of this, operations leaders are being asked to identify ways to connect and align the learning and development technology portfolio to improve visibility, speed to ramp, skills, coaching and reinforcement. This is because the dramatic shift to remote and “4D” selling has forced sales learning and development teams to do more, with less, faster. Specifically, the research found that sales managers are not very effective at coaching remotely and have largely failed to leverage the potential of advanced

analytics to improve accountability and reinforcement. The survey identified visibility into adoption, behavior change and use of sales skills and tools in selling situations as the biggest opportunity to improve sales performance. To fill these skill gaps and enforce the behaviors in execution – sales leaders are taking a more integrated and virtual approach to sales development, enablement, and measurement. There's lots of opportunity in connecting the dots between these functions and systems.

This is because the technologies and programs that underlie sales development, management and measurement are usually highly fragmented. As a result learning management systems are disconnected from the sales enablement systems where sales playbooks reside. And the sales analytics and AI used to measure sales activity, adoption, and behavior are not linked to sales readiness and training. This leads to limited feedback and reinforcement sellers because very little of this information is available to sales managers to support grading, coaching, reinforcement, and performance measurement. "There's no good business or technical reason for learning management, readiness, enablement and advanced sales analytics need to be separate and disintegrated," according to Jeff McKittrick the Vice President, the AVP of Go-to-Market Systems and Strategy at Pure Storage. "All are in common use across most sales organizations. But they exist largely in silos because the functional experts that buy, manage, and deploy the systems and assets that underlie sales development have no financial incentive to connect the dots across them."

Level 2: Reconfigure and connect the enterprise sales enablement, training, and development technology portfolio into an integrated and closed loop process that provides feedback, reinforcement and visibly into seller activity and compliance

The most advanced operations teams are connecting the dots across their Learning and Development technology portfolio into a closed loop process that provides feedback, reinforcement and visibly into seller activity and compliance. This integrated sales development approach is both highly efficient but also a "closed loop" in that it connects training to behavior to performance. For example, training and skill development can be assigned and executed virtually by taking advantage of video role play and pitch management systems. These allow reps to practice and develop role play, product demo and "situation-specific" presentation skills remotely using video platforms. These video role plays can be inspected and graded consistently and at scale using a mix of AI-assisted scoring and human assessment by peers and managers. The best of these can be cataloged and tagged to be deployed in real time using advanced AI and guided selling tools that recommend the next best sales play, or most relevant content, based on buyer engagement and response data and the context of the selling situation. Managers can track and measure how this effort and training translate into actual customer engagement and account success by building data-driven KPI that quantify outcomes based on actual seller activity, customer engagement and success. And the entire process should fuel a feedback loop that continually reinforces skills, refines plays, adapts to customer needs, and tightens the connection between training and results.

Not every organization can take all these steps at once. But most of the underlying technologies and assets are in place in most large and complex sales organizations. Connecting any of these dots will represent a significant step forward compared to the status quo. For example, Cvent was able to increase the productivity of their Sales Development Reps (SDRs) without sacrificing call quality by automatically capturing call logs in CRM and enabling a collaborative coaching culture using conversational intelligence to help manager monitor and coach reps in real time. "The ability to listen to reps' conversations in real time allowed Cvent sales managers to spend more time coaching and less time waiting for a rep to identify a meaningful call and listen in," according to Jen Schlueter, Senior Manager of Strategic Projects and PMO at Cvent.

Level 3: Consolidate and integrate enterprise sales enablement, training, and development systems, data and content to support data-driven coaching at scale in real time and optimize the sales rep recruiting, ramp, and retention process across the organization.

Operations leaders are being asked to treat the rep recruiting, ramp and retention cycle as a cross functional business process that spans the enterprise. This is important because a five percent increase in sales rep attrition across your sales team can increase selling costs 4-6% and reduce total revenue attainment by 2-3% overall. For low growth and low margin companies ten points of salesforce attrition can wipe out revenue plans and margins if nobody picks up the slack. The difference between a 5% attrition rate and 25% means cost an increase of over 50% in cost to sell and revenues drop by 20%. Companies with the greatest success and lowest levels of turnover treat attracting, recruiting, onboarding and nurturing talent as a critical business process. For this to happen, the many organizations involved – sales operations, sales training, sales management, and human resources – need to be closely integrated in order to develop a holistic approach to recruiting new sales reps and helping them become successful.

Coaching and mentoring are a primary driver of retention because 45% of employees would stay with their current employer if they offered more skills and training according to Monster. Salespeople who get at least one-half day a week, one-on-one, with their managers are twice as productive as salespeople who do not get this focused development time. The big problem has always been that sales managers have been limited in their ability to individually coach sales reps by their span of control and free time for sales call monitoring or “ride-alongs”. So they are only able to actively coach a limited number of reps. AI-enabled one-to-one coaching tools can act as a force multiplier that expands the coaching capacity of your managers. These tools take advantage of the ability to record sales conversations and use advanced analytics to compare them to selling outcomes and best practices in real time. This data gives a sales manager the ability to actively manage and coach many more reps and be there at critical points in the conversations such as common objections, competitive mentions, or signals of attrition. It also lets them understand what training has been adopted, and whether it is successful at changing customer behavior. This will accelerate how quickly new reps’ ramp to full productivity.

For example, Equity Trust Company, a financial services company that enables individual investors, was able to leverage AI and conversational intelligence to enable coaching at scale. The Sales Enablement team at Equity Trust combined sales readiness, engagement and conversational AI into a closed feedback loop that allowed managers to monitor more calls and provide real time guidance and fixes to reps on calls. This enabled them to double the manager to rep ratio from 6-12 and improve conversion and rep satisfaction at the same time. “It would have taken 90 days for our sales team to audit calls on their own. With Conversation AI it took us a day to get the data we needed,” according to [Christopher Cases](#), Senior Manager Sales Enablement at Equity Trust.

10

Quote to Cash Operations. Design, deploy, integrate and manage to enhance the lead-to-cash cycle and capture more revenue, margin, and price. Growth leaders need to deploy revenue enhancement technologies to enhance the lead to cash cycle and capture more revenue, margin, and price realization by providing front line revenue teams with CPQ, order management and fulfillment tools to support negotiation and closing by optimizing the pricing, personalization, and packaging of presentations, proposals, and solutions they present to clients. These elements of the quote to cash operations aspect of the role – current and future – are outlined below. Three levels of maturity are provided to help evaluate your commercial operations to identify key capability gaps and prioritize the most important ways an operations leader can move your revenue team to the next level of performance.

Level 1: Design and enable systems, rules, and operations to configure, quote, and approve deals, enforce pricing, discounting, and terms and ensure the fit, viability, and potential value of customers.

A majority (55%) of senior finance executives believe optimizing the “quote to cash” cycle - from product configuration and approval to payment - would increase enterprise revenues by at least 5%. Because of this, operations teams are being asked to identify ways to connect and automate the quote to cash cycle with configure, price, quote and fulfillment tools to save time, enhance the customer experience, and reduce revenue, price, and margin leakage in the lead to cash cycle. For example, [Peter Ford](#), the VP of Global Sales at iconectiv, is transforming the quote to cash cycle by making 1% marginal gains in everything that is holding his sales team back. Enhancing the core contracting, pricing, quoting, order management and fulfillment processes can make a big impact. “It can be as simple as the process for agreeing and signing and executing an NDA with a customer – which took far too long in my opinion,” shares Ford. “All of these things contribute to friction in the sales cycle and points where you can either lose a sale or dissatisfy a customer. And so, our transformation success has been the sum of marginal gains in every single area.”

Pentair established a Commercial Excellence program that identified a number of ways to improve the “prospect to cash” process including customer segmentation, deep voice of the customer, and improved launch processes, to name a few. These are all potential areas to accelerate business with our sales and channel partners. “From a digital technology perspective, we’ve focused on the channel enablement process to provide our channel partners the information, insights, training, and visibility they need to realize more opportunities in their markets and share our performance end to end, according to [John Jacko](#), the Chief Growth Officer. “We have also initiated a more robust Voice of the Customer program to get much more granular and actionable customer feedback. It drives our segmentation, priorities, and plans, and changed how we believed customers behaved.”

Level 2: Integrate the roadmap to CPQ, billing and fulfillment tools to accelerate the lead to cash cycle, reduce revenue leakage, optimize price, and give finance greater control over margins, and better visibility into revenue recognition over time.

Operations leaders are being asked to centralize the management and administration of CPQ and fulfillment tools across functions to maximize their adoption and financial impact. Administering and configuring price and quote (CPQ), order management, and fulfillment tools commands significant operations resources. This task is complicated by the fact that these tools typically live in five or more functional organizations. This leads to overlapping overhead and the uncoordinated execution of these platforms in the seller workflow, which wastes seller time and leads to price and margin leakage.

To better manage these assets, Wade Burgess, the Chief Growth Officer of Velocity Global centralized the operations and enablement teams that managed and supported all of the tools that sellers used, including the deal desk which supported CPQ, RFP, and fulfillment tools. “A really important step was putting in place a single revenue operations team with really solid, strong technical people from sales and marketing operations,” reports Burgess. “I really wanted one person responsible for the operational tools, processes and systems that we use for monetization. It's a roll up of sales, operations, revenue, operations, and also sales effectiveness is in there and we're adding an insights person to that team.”

Level 3: Automate the quote to cash process to extend financial control into the front office to investigate conflicting data sources and errors to better identify, diagnose and remediate problems leading to revenue leakage, variances, billing disputes and discrepancies on booked business.

Most organizations are exploring systems and solutions that allow them to extend their financial control systems into the front office and gain access to critical customer contracting and order data needed for reliable revenue forecasting and optimization. Nearly two-thirds (67%) of finance leaders are actively exploring new processes or systems to support recurring revenue products or services. Almost half (49%) of CFOs are actively transforming their order to cash processes, according to a Grant Thornton CFO Survey. To achieve this, the most progressive organizations are automating and streamlining the upstream customer engagement, quote, and order entry to invoicing processes to ensure they capture consistent customer order and billing information across every channel touch point. Controlling front office problems early in the revenue cycle such as rogue discounting, poor account approvals, bad product fit, and wrong priorities can accelerate revenues and improve the return on selling investments. For example, 71% of senior financial executives think a more efficient pricing and approval process would substantially improve their organization's profitability according to the CFO Research study. In addition, eliminating downstream billing disputes and late collections can stem revenue leakage, shrinkage, and slippage between booked and realized revenues – which can exceed 5% of total revenues. For example, according to client research by Salesforce, automating the subscription billing process can help your organization reduce invoice disputes and the days it takes to collect cash by over 10%. Automating the quote-to-cash cycle can increase new business and renewal conversions by double digits.

“We're big believers in team of teams, says Jenna Pipchuk EVP in Chief Sales Officer of Smart Technologies. “We view growing a business as an alliance where all the teams that touch revenue have to work together and you have to fundamentally believe in the one unified revenue perspective. We really talk about the Unified Commercial Engine which is all the people, channels and the entire revenue stack that supports the revenue cycle. And we in sales work together with marketing, finance and product on that. We operate as a cross-functional team to manage and accelerate revenues. For example, I will have the CMO, the product managers and finance in it because we all need to work together to maximize the revenue pipeline, bookings, and billings. I've never in my career in sales had to work as closely with the CFO because in the Unified Commercial Engine model, our conversations about how to maximize bookings have now turned into conversations about how to we influence and optimize daily billings and receivables.”

Commercial Asset Management: Greater Accountability and Financial Returns on Growth Assets

COMMERCIAL ASSET MANAGEMENT JOB DESCRIPTION



The strategic management and monetization of the commercial data and technology assets to maximize their utilization, impact, and financial returns and accelerate revenue growth

COMPETENCY	LEVEL 1:	LEVEL 2:	LEVEL 3:
11.0 Commercial Technology Portfolio Management. Centralize stewardship and reconfiguration of the commercial technology portfolio across functions and every stage of the revenue cycle	Central stewardship of the sales technology portfolio, including the implementation, rollout, training and support for the sales stack, prioritize investment that improve commercial productivity, simplify the seller experience, augment seller value, and reduce cost to sell	Centralized stewardship of the commercial technology portfolio. Implement, rollout, train, and support the marketing and sales stack, prioritize investments and prioritize investment that improve the customer targeting and support account based marketing.	Centralized stewardship of the commercial technology portfolio. Implement, rollout, train, support and connect key elements of the marketing, sales and customer success technology stack into a revenue operating system that improves responder rates, personalizes messages, improves the customer relationship, and expands customer relationships.
12.0 Customer Data Asset Management. Centralize stewardship of CRM data and establish a common architecture and operating system to consolidate, enhance, curate and monetize customer data assets	Centralized data stewardship to ensure the integrity, quality, value and monetization of customer data assets in CRM and other systems that support the sales team. Includes efforts to architect, map, clean, enhance, consolidate, and manage customer data for pipeline reporting and performance measurement.	Centralized data stewardship to architect, map, clean, enhance, consolidate first party customer data from marketing and customer touchpoints with customer data from CRM and third party data sources. Includes initiatives to leverage data in sales decision support, measurement, targeting, content and next best selling recommendations.	Centralized data stewardship to ensure the integrity, quality, value and monetization of all customer engagement data assets in a unified customer data platform, including data from CRM and other first party systems that support sales, marketing and success. Includes efforts to architect, map, clean, enhance, consolidate, value and manage customer data as well as initiatives to leverage data in decision support, measurement, targeting, personalization and next best selling recommendations.

The Role of Revenue Operations In Generating Greater Returns on Your Commercial Assets

Growth leaders are taking three steps to strategically manage their commercial data, technology, content, and IP assets to maximize utilization, impact, and return on investment. There are three core capabilities your organization will need to develop to improve your performance and realize greater growth from existing resources.

11

Commercial Technology Portfolio Management. Centralize stewardship and reconfiguration of the commercial technology portfolio across functions and every stage of the revenue cycle. Growth leaders are seeking to establish more centralized stewardship and reconfiguration of the commercial technology portfolio across functions through the stewardship, reconfiguration, and strategic management of commercial technology ecosystem (assets) to maximize utilization, impact and return on investment and simplify and speed selling activities. These elements of the commercial technology portfolio management aspects of the role – current and future – are outlined below. Three levels of maturity are provided to help evaluate your commercial operations to identify key capability gaps and prioritize the most important ways an operations leader can move your revenue team to the next level of performance.

Level 1: Central stewardship of the sales technology portfolio, including the implementation, rollout, training and support for the sales stack. Prioritize investments that improve commercial productivity, simplify the seller experience, augment seller value, and reduce cost to sell

75% of organizations are reconfiguring their commercial technology portfolios to improve the seller experience, reduce costs and increase the return and utilization of selling assets, according to interviews with over 100 growth leaders in the book Revenue Operations. Because of this, operations leaders are increasingly being asked to centralize selling tool administration to leverage staff resources and establish common architecture for reconfiguring the commercial technology portfolio across functions. For example, Jennifer Mauldin, President and Chief Customer Officer, Inmar Intelligence advocates a more centralized approach to managing, administering, and integrating the sales and marketing technology portfolio. Using this approach Inmar has effectively used sales technology to break down silos across functions and better enable the end-to-end customer journey. “We have a very good dynamic of collaboration across the C-suite that helps break down those functional silos that can hold back growth,” says Mauldin. “We have created a center of excellence for sales to formalize the process of integrating technology across our teams that is cross functional. We’ve seen the number of Salesforce.com users more than double over the past three years as a result. And we’re going to get service more involved by implementing Service Cloud to expand that even more.” Jennifer notes that is not always the case with other organizations she works with. “Sometimes you get Chief Client Officers that think in a silo, and they only consider their organization when they invest in sales technology rather than considering the entire enterprise and how it interlocks with other functional areas to make the entire process better.”

In this capacity, operations teams are being tasked with assessing the commercial technology portfolio architecture and roadmap to reduce duplication, disconnected apps, underutilize assets and find ways to improve value, impact, and the seller experience. This will identify better ways to use digital technology to boost sales productivity and performance and scale faster at lower cost. This means managers are being expected to get far better performance from their large sales technology portfolios that support pricing, training, coaching, content sharing, customer relationships and contract management. They are also required to coordinate efforts across organizations to make scalable technologies like coaching at scale, one to one personalization, closed loop learning and development processes and real time data driven guidance during sales calls operational across the enterprise. To do this, business leaders should inventory, evaluate, and reconfigure their growth technology portfolio from the top down to focus on the big hot spots in the sales process. The best are growing productivity by over 50% while cutting costs by linking together the twenty or more pieces of their legacy growth technology stack into highly productive “ecosystems” that better support day-to-day selling.

To do this operations leaders have to reimagine their growth technology portfolio from the top down to focus on the big hot spots in the sales process. The best are growing productivity by over 50% while cutting costs by knitting together the twenty or more pieces of their legacy growth technology stack into highly productive “ecosystems” that better support day-to-day selling activities. According to Greg Munster, growth leaders should focus on five things as they simplify, streamline, and focus their sales enablement, readiness, and engagement technology portfolio on accelerating revenues in the new market reality.

1. Rationalize sales enablement, readiness, and engagement into a single platform to create a closed loop feedback system that integrates planning and prioritization before the sale, with action and engagement with the buyer, to reinforcement and coaching after the fact.
2. Connect the dots across the ecosystem to connect more data, content from sales and marketing systems to revenue teams, sales management and leaders can turn it into growth and value.
3. Do it faster – or in real time – at the moment that matters (during the sales call).
4. Turn big data into small data that informs high value and complex human (SMS) selling interactions.
5. And keep it simple (fewer panes of glass, less information overload, less multi-tasking).

“Connecting these dots may sound complicated. But it doesn’t have to be,” according to Jeff McKittrick, the AVP of Go-to-Market Systems and Strategy at Pure Storage “One thing I’ve learned in 15 years of building and implementing digital selling and sales enablement platforms at Cisco and Hitachi is that when it comes to technology people tend to overthink things. In reality, knitting together a highly profitable and productive portfolio of selling technologies is not rocket science. It does require hard work, teamwork, and leadership. But there’s definitely a cookbook – and the recipe for success is pretty straightforward.”

“The trick is to apply the 80/20 rule and not let perfect get in the way of profitable,” continues McKittrick. “Most B2B sales teams struggle with the same fundamental things.” In his conversations with hundreds of sales operations executives, McKittrick consistently sees the same five or six problems or “hot spots” in the sales process that hold salespeople back.

Level 2: Centralized stewardship of the commercial technology portfolio. Implement, rollout, train, and support the marketing and sales stack, prioritize investments and prioritize investment that improve the customer targeting and support account based marketing.

Many organizations are being asked to centralized stewardship of the sales tech stack and marketing solutions portfolio. To do this Conga put Sales Operations, Field Operations, Deal Desk, and Order Operations under the purview of Marketing Operations leader, as part of a RevOps Transformation initiative. Jeff McKittrick was tasked with rationalizing and focusing the technology portfolio at Hitachi Vantara. To do this his team conducted a top down assessment of the twenty plus tools in the technology portfolio. “Our Sales Operations, Sales Enablement, and Content Operations teams worked together to conduct a technology stack assessment and rationalization analysis, reports McKittrick, whose team were feted as the sales enablement execution of the year for their results.”

One goal is to aggregate customer activity, seller activity, product usage data from first party digital marketing systems and combine it with CRM data around a common customer profile. Most (61%) of high-performing marketers have developed a single view of the customer to direct targeting. They do so by unifying data from many touch points, channels, and media interactions into a common customer profile. Customer Data Platforms have automated the orchestration and management of this data across individual customer profiles as well as key accounts. Sales automation solutions automatically log customer interaction data to enrich CRM files and get a 360-degree view of the customer. Other solutions can help enrich customer profiles with third party prospect, trigger, and behavioral data. For example, sales automation solutions like Seamless.ai and Node clean customer data and enrich customer profiles to make them more predictive and usable by frontline revenue teams and the applications they use to engage customers. “Our digital channels, devices, and marketing and sales technologies are generating new IoT of data we can leverage to sell better and improve the customer experience,” says Bill Borrelle the CMO of Pitney Bowes. “We’re continuing to find ways to use technology to combine first-party customer data from our digital channels with third-party customer insights to develop richer signals of buying intent, churn, competitive activity and upsell opportunities for our sales teams.”

A top reason for managing both the sales and marketing technology portfolio is to better enable Account-Based Marketing (ABM) programs to optimize account coverage and expansion. Operations teams are being asked to connect a variety of sophisticated Account Based Marketing (ABM) or Account Engagement Platforms that apply digital, targeting, and personalized marketing practices to improve sales productivity and key account development. These platforms help them blend advanced analytics, with marketing content, and high degrees of sales and marketing integration to accelerate enterprise selling and redefine the customer journey. ABM is a great example of a program that is much better described and managed as a system that connects dots across the sales, marketing and service ecosystem rather than a narrow technology category. For example, 6Sense uses AI and analytics to analyze buyer engagement data from many different sources to support day-to-day selling by revenue teams. They orchestrate prospect and customer engagement data across many systems. They map that data around account structures to make it much easier to develop, cross, sell up, sell and penetrate their best customers. They integrate that

data with profiles in CRM. They augment that data with third party data that holds buying signals and identifies anonymous visitors. This is helping growth leaders to leverage their huge investments in sales, technology, CRM, and content management and enablement systems.

Level 3: Centralized stewardship of the commercial technology portfolio. Implement, rollout, train, support and connect key elements of the marketing, sales and customer success technology stack into a revenue operating system that improves responder rates, personalizes messages, improves the customer relationship, and expands customer relationships.

At the most advanced level, operations leaders are being asked to build the commercial technology roadmap around core platform partners to facilitate the convergence of enablement, readiness and engagement solutions and create a highly integrated technology ecosystem that is data-driven, digital and accountable. The most successful growth leaders will take a “top down” approach to managing their sales and marketing technology portfolio and generating higher returns on their technology, content, and data assets. By looking at all the building blocks together, they will rationalize, focus, and connect the various pieces to better support their selling processes and generate measurable value to the business. Specifically, they will stitch together the building blocks in their technology stacks around three logical technology ecosystems with the most obvious opportunities to generate higher returns on their selling assets to grow sales, profit, and firm value. The first are digital selling platforms that automate, simplify, and speed up selling by addressing the major points of friction, failure, and manual work in the day-to-day selling workflow. The second is assembling federations of AI enabled engagement technologies that leverage advanced analytics to deliver real time guidance to reps and enable one to one coaching at scale at the moments that matter in customer conversations. The third is to integrate a learning and development solutions portfolio into a closed loop system to support coaching in real time and feed a continuous loop of training, reinforcement, measurement, and improvement.

12

Customer Data Asset Management. Centralize stewardship of CRM data and establish a common architecture and operating system to consolidate, enhance, curate and monetize customer data assets.

Establish a common architecture and owner to strategically manage customer and engagement data assets to maximize utilization, impact, and return on investment and establish a common fact base for data-driven selling and reporting. These elements of the customer data management aspects of the role – current and future – are outlined below. Three levels of maturity are provided to help evaluate your commercial operations to identify key capability gaps and prioritize the most important ways an operations leader can move your revenue team to the next level of performance.

Level 1: Centralized data stewardship to ensure the integrity, quality, value and monetization of customer data assets in CRM and other systems that support the sales team. Includes efforts to architect, map, clean, enhance, consolidate, and manage customer data for pipeline reporting and performance measurement.

Operations leaders are being asked to inventory and evaluate customer data sources to establish a common data architecture across first party and third party systems. This is because growth leaders have figured out they have the fundamental data to get started with prescriptive selling – recorded conversations, content consumption by clients, CRM and exchange data from email and calendars within their organization already. They are asking operations teams to identify and leverage this customer engagement and seller activity data they already have to pilot real time guidance and coaching at scale. For example, Kirsten Paust, VP Fortive Business Systems believes every organization has the opportunity to leverage the customer engagement data that already exists within their organizations to make an impact if they don't let perfection stand in the way of progress. “When it comes to analytics, our philosophy is making progress over perfection,” according to Paust. “One of our fundamental beliefs on this is to start with the data that you already have. And over time you can decide to enrich those data sources based on your need to get better visibility into things that will make you more effective. Most of our companies have readily accessible data they can use. For example, everyone has revenue or sales data so they can use it to better understand what customers are buying from you as well as renewal and churn rates. Most also have service records which helps them understand who is asking for service and what we might be doing better for them. Many of our businesses have what we call product telemetry data, which is product usage data that provides invaluable insight into what customers are using, where they are getting value, and where we can help them realize value they aren't getting today,” says Paust.

“One of the biggest ways we will scale intelligently is by investing in advanced analytics. Investing in analytics is critical to our growth, says Wade Burgess, the CRO of Velocity Global. “It may not sound like a normal CRO priority but is a high priority for me to get the right data infrastructure in place so that we can intelligently scale revenue growth. I think managing sales without analytics is like navigating without a GPS or without Waze. Insights to me is incredibly important and partially because we're currently sitting on an amount of unstructured data that's not being used in an optimal way. I believe that access into customer insights and to be able to automate action against the opportunity they reveal is going to be a key for us to be able to scale. There is an enormous amount of unstructured customer engagement, behavior, and consumption data coming from our 170,000 customers who use our self-service engine. On top of that we have a whole bunch of people who interact with us on the top of the funnel that never convert.”

“The shift to the Chief Growth Officer role has the benefit of providing more executive ownership of some key growth initiatives – notably our 360 view of our customer through responsible and secure data management, which our team is charged to bring together and govern,” says John Jacko the Chief Growth Officer of Pentair. “Given the importance of advanced analytics and personalization, the delivery of the right customer and product data provides the visibility our teams count on to optimize our growth formula. Forecast accuracy. Enabling digital channels. Arming dealers with leads and client insights. Creating more data driven incentives that map to customer lifetime value.”

Level 2: Centralized data stewardship to architect, map, clean, enhance, consolidate first party customer data from marketing and customer touchpoints with customer data from CRM and third party data sources. Includes initiatives to leverage data in sales decision support, measurement, targeting, content and next best selling recommendations.

Operations teams are being asked to chase the holy grail of establishing a single source of truth for all customer engagement and conversational intelligence data. For example, Joe Cumello and Jason Phipps, the CMO and CRO of Ciena Networks believe that operating from a single set of facts is critical. “We worked with our partners in IT to better leverage data from across the organization, reports Joe Cumello, the CMO of Ciena Networks. “A lot of companies, and ours is one of them, have data silos from operations to the finance function. This goes beyond what Jason, and I have control over so that's a bigger discussion than just sales and marketing operations. So, we had to step back and have a bigger discussion amongst the leadership about what we want to do with data and analytics and AI and how we amalgamate and create value with the data. This will create a big opportunity.”

A primary reason Wade Burgess consolidated revenue operations at Velocity Global was to establish a single source of truth for all customer engagement and conversational intelligence data “One reason revenue operations is important because the revenue team uses the same data, and I didn't want multiple sources of truth,” reports Burgess, who is the Chief Growth Officer. The reason this makes sense is there's got to be one central point of truth and we can know what real conversion rates are. Everybody knows I'm a data geek. Many of the things we have to do involve being able to look inside of existing, transactional data to direct sales force actions like identifying cross sell and upsell opportunities and targeting groups of customers who can be aggregated into enterprise accounts.”

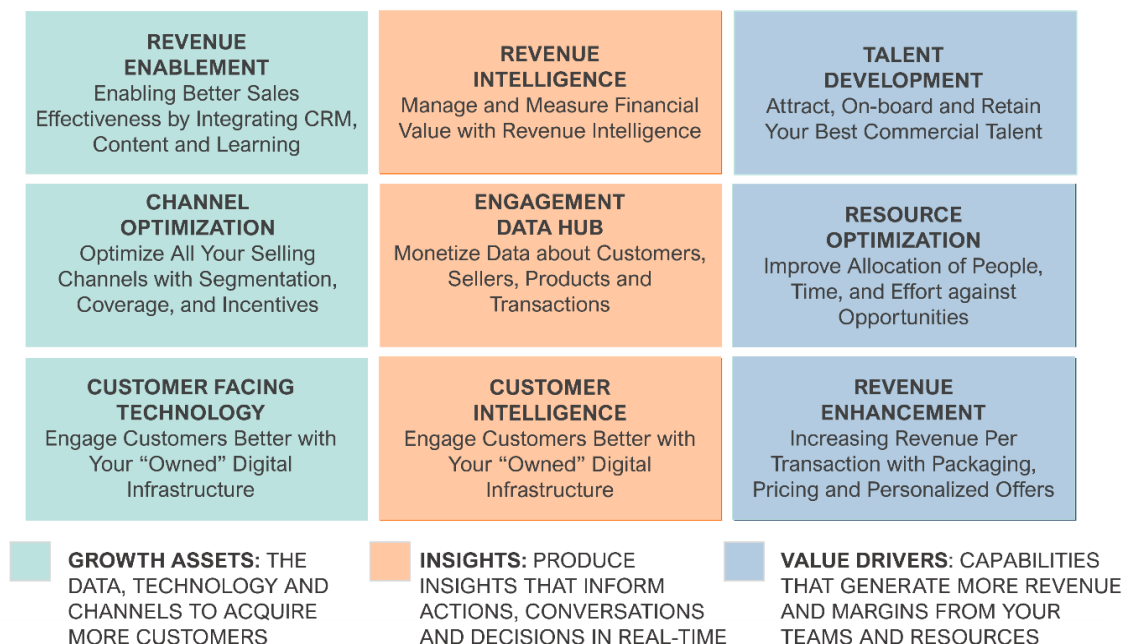
RE/MAX was able to improve data quality in their CRM system and lay the foundation for data-driven enablement by automating call logging customer calls in their call center into CRM. Brokers at the real estate firm RE/MAX are far more productive because they automated many of the day-to-day call tracking and logging tasks that were stealing time away from responding to urgent opportunities from home buyers. This also eliminated many of the downstream data-quality issues in Salesforce.com CRM created by inconsistent and labor intensive entry by brokers whose time was better spent talking to clients. By improving data quality, RE/MAX was in a better position to leverage customer analytics to optimize their campaigns and optimize conversion from lead to customer at a much faster rate.

Level 3: Centralized data stewardship to ensure the integrity, quality, value and monetization of all customer engagement data assets in a unified customer data platform, including data from CRM and other first party systems that support sales, marketing and success.

At the highest level, operations leaders are being asked to architect, map, clean, enhance, consolidate, value and manage customer data so it can be better used in decision support, measurement, targeting, personalization and next best-selling recommendations. To provide structure to this complex task, the best operations teams are using the Revenue Operating System to provide a blueprint for aggregating, transforming and routing data to support revenue intelligence, and all aspects of data-driven selling and coaching and measurement. the Revenue Operating System is a coherent model for aligning the people, process and technology to create more scalable and consistent growth. The Revenue Operating System (Exhibit 6) is designed to

unlock the potential of technology to make selling more digital, data-driven, measurable, and most importantly profitable. At its core, this new model for selling creates value by unifying and monetizing customer data and insights at the center, while enabling and automating cross-functional sales, marketing and service workflows the at the edge.

EXHIBIT 8: THE REVENUE OPERATING SYSTEMSM



This system is designed to help business leaders to reimagine their technology stacks and go-to-market models around platforms that aggregate, orchestrate and deploy customer engagement data rather than a disconnected portfolio of “point solutions” purchased and designed to solve functional problems. The results suggest a Copernican revolution in how companies generate revenue by harnessing the full potential technology to accelerate scalable, sustainable and profitable growth. The ultimate goal is to assemble the core components of the customer analytics infrastructure of a system that turns legacy investments in CRM, digital marketing infrastructure, and the customer data they create into selling outcomes that grow revenues, enterprise value, and profits. To make this a reality, sales leaders are increasingly looking to a new set of analytic tools – including, Sales Engagement Platforms, Customer Data Platforms and Sales Analytics and Automation solutions – that can convert data into information, and information into value. These tools are taking on the hard work of orchestrating data from across channels and making it available to sales, marketing, and service reps in real time. In practice, businesses are deploying these solutions in ways that integrate with, augment, and in some cases bypass legacy CRM systems to combine and monetize customer engagement and seller activity data. This represents a material shift in the center of gravity in sales systems from CRM being the administrative system of record in sales to customer data platforms that are faster, more prescriptive, predictive, and actionable.

You can learn more about the Revenue Operating System in our book, *Revenue Operations: A New Way to Align Sales and Marketing, Monetize Data, and Ignite Growth* (By Wiley).

VI. ABOUT THE RESEARCH

This research initiative was led by Stephen Diorio, Board Advisor to Revenue Operations Associates with support from the expert faculty of Revenue Operations Associates in collaboration with over 25 industry practitioners and experts. To define and execute this best-practice analysis, we drew upon the faculty of leading academics, experts, and practitioners in the field of Revenue Enablement and sales management has conducted interviews with 102 growth leaders and sales effectiveness professionals and experts between January 2022 and March 2023. These experts lent their research and decades of practical experience and external validation to the recommendations about how organizations are transforming the operations that support revenue growth to get sales, marketing, and service organizations to work as one revenue team and make the selling process faster, more digital, data-driven, and measurable in the face of changing buying behavior and underperforming growth assets. The faculty contributing directly to this analysis include: Steven Busby, Managing Director of Revenue Operations Associates, Jeff McKittrick, AVP, Go-To-Market Systems and Strategy at Pure Storage, and Greg Munster, Vice President of Sales Operations at Wolters Kluwer Health. In addition, the research was supported by contributions from academics and subject matter experts from the Revenue Enablement Faculty including David Edelman, Bruce Rogers and Professors David Reibstein, Leonard Lodish, and Raghu Iyengar of Wharton, and Bob Kelly the CEO of the Sales Management Society.



Stephen Diorio, Stephen Diorio is author of the book Revenue Operations and serves as a Board Advisor to Revenue Operations Associates. He is a leading authority in go-to-market transformation, sales and marketing performance management, and revenue operations, Stephen has helped over 100 organizations to reengineer their revenue operations to accelerate growth and become more data-driven, digital, and accountable. He has authored several books on commercial transformation including Revenue Operations: A New Way to Align Sales & Marketing, Monetize Data and The Quality of Revenue Operations.

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