



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

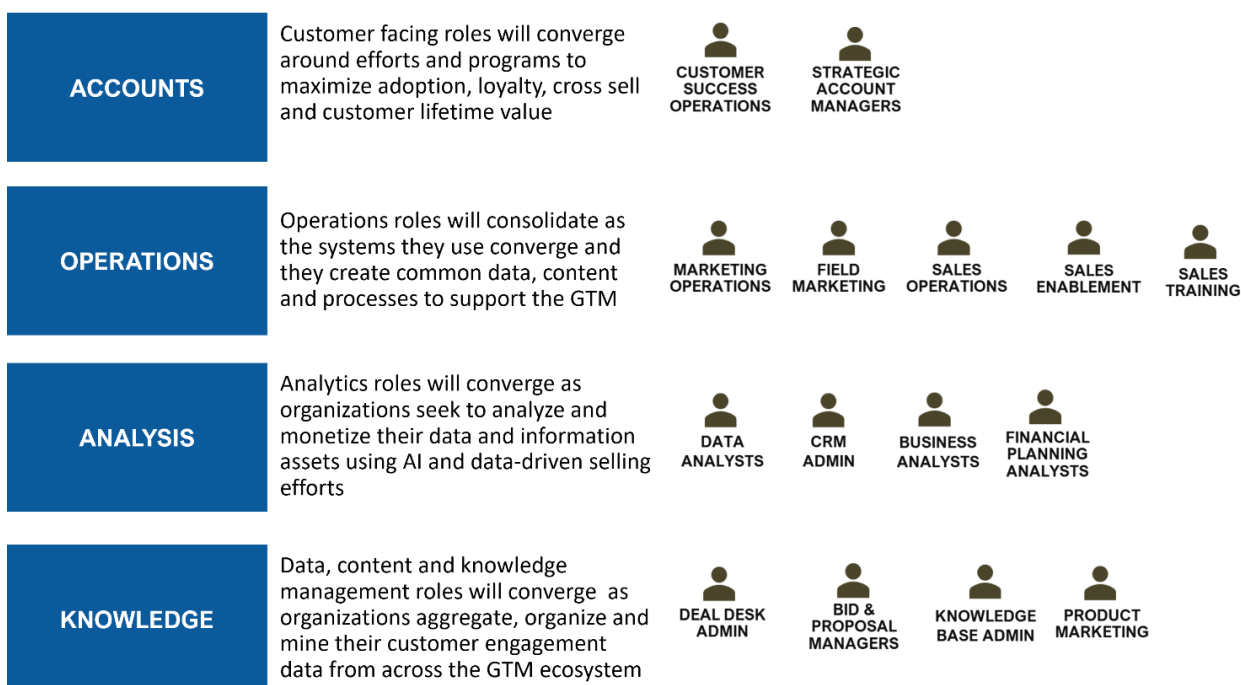
A MATURITY MODEL TO GUIDE THE DEFINITION AND EVOLUTION OF THE REVENUE OPERATIONS JOB FUNCTION IN YOUR BUSINESS

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.

Revenue Operations Associates is a Go-to-Market Acceleration company. Our proprietary education, certification and acceleration tools help growth leaders and their revenue teams to realize the full GTM potential of their business by mastering Revenue Operations

