

# Revenue Operations

## REVOPS 101

Everything You Need To Know  
About Revenue Operations

## METRICS TO TRACK

Why It's Good For Business

## OPERATIONS FRAMEWORK

Preview Of Getting Started

# Writing Is On The Wall

TREVELINO/KELLER



You need to change the way you operate if you want to drive predictable and sustainable growth today.

It's why organizations are increasingly leveraging the Revenue Operations (RevOps) model.

Growth leaders can proactively and confidently identify growth opportunities by aligning all go-to-market functions (sales, marketing, and customer success) toward unified business goals and outcomes.

Yet knowing if RevOps is right for your business can be challenging. You may need help understanding what it is, how it works, or how to best implement it. And it can take time to determine if now is the right time to implement this new model.

As a B2B marketing agency focused on helping B2B companies drive revenue growth, we often suggest a RevOps approach to our clients if they're looking to:

- Improve their bottom line
- Create unified business metrics
- Improve customer retention
- Expand into new markets
- Streamline operations
- Drive transparency and accountability
- Align revenue targets across sales/mkt



Sound familiar? Then you're in the right place. We've created this comprehensive guide to help growth leaders like you get up to speed on everything there is to know about RevOps and how to get it up and running in your organization.

# Playbook Inside



1

**Revenue Optimization.** First let's get to know revenue optimization and why it's so important.

2

**Benefits & Pillars.** The benefits are quantifiable if you can build upon four core pillars.

3

**Framework & Metrics.** If it was easy, anyone could do it. We're here to operationalize and track.

4


**Getting Started.** Like anything ambitious, there may be challenges at the start, we'll address that too.





# TREVELINO/KELLER

An Integrated Growth+PR=Creative Agency



Being truly integrated means establishing expertise without weakness in any particular area. That requires you to invest in the talent and technology without bias, so your recommendations are driven by strategy, not what's in the best interest of the firm.

We also recognize that everything we do has to align with revenue. That's how we keep our job. True, it's what we signed off for, being that partner charged with that responsibility to move the needle forward from brand development to awareness, reputation, engagement, lead, enablement and optimization.

That's all good. All we ask is that you give us the keys to the entire funnel, and we'll let loose a small army of scrappy GOATs not afraid to run full speed at whatever gets in their way.



**TREVELINO/KELLER**

# RevOps. Just So Important.



## END-TO-END B2B FUNCTION OF INTEGRATING AND ALIGNING SALES/MARKETING AND CUSTOMER SUCCESS

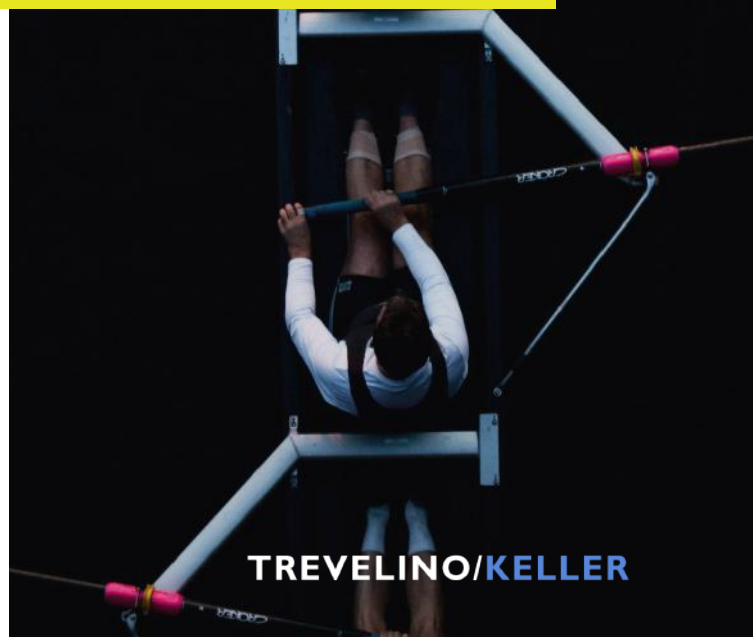
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Revenue operations is not just critical because the business environment is increasingly more uncertain. It's important because the board says so and investors are tying a firm's value to its ability to generate revenue growth. They're using it to justify purchase price which may explain why you might be seeing a push from the board to transform your organization's business model. Of course, research shows that organizations that successfully align their commercial teams, processes, and infrastructure can improve long-term growth prospects by over 50% and contribute 5 to 10 points of bottomline profit in the short term.

But outside of these trends, a RevOps model is simply a necessity for running a business in the 21st century. The way customers purchase products and services has changed. And as technology advances, it will continue to fragment the customer journey — making it harder for teams to deliver a seamless and consistent experience.

To be successful, your revenue-generating teams need more transparency and accountability across the entire revenue funnel to deliver the experiences customers now expect and demand. They need to avoid the disconnect between what customers buy and what they need. This requires integrating the right set of tools to enable your teams to have full visibility into every customer interaction.

- Address gaps between your sales and marketing team
- Streamlines sales processes and sales forecasting
- Identifies how and where revenue leakage occurs in your revenue stream(s)





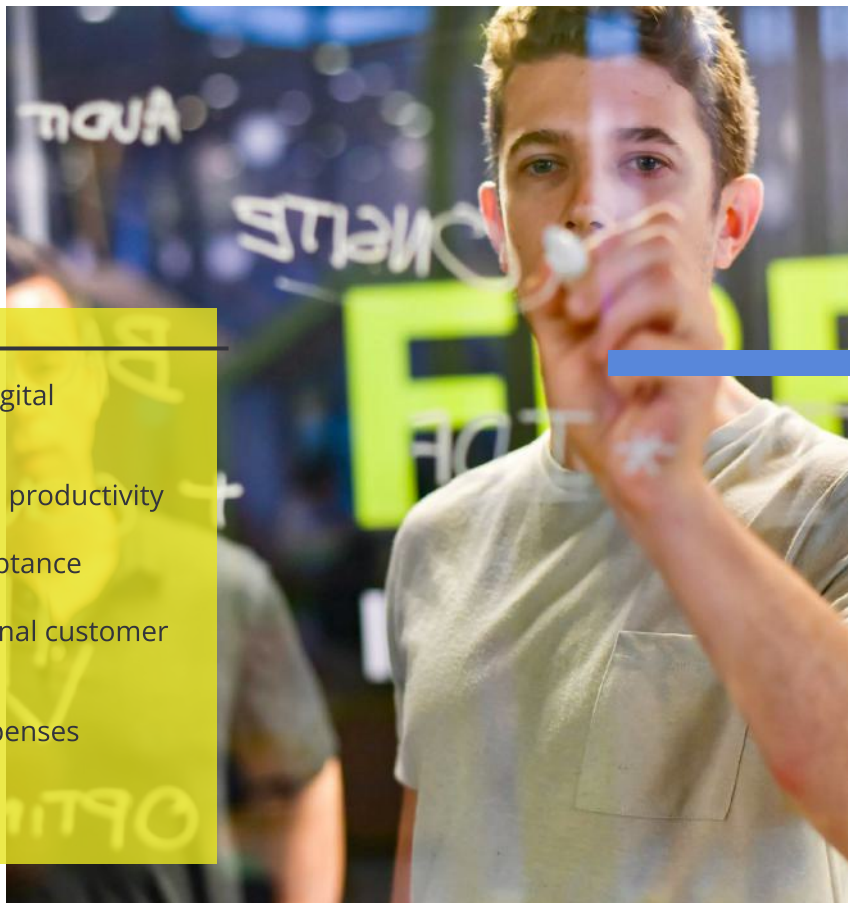
# Benefits of Revenue Operations

Increased collaboration, alignment, efficiency, and revenue are natural by-products of adopting a RevOps model. But those aren't its only benefits. Beyond the obvious, it can help you gain a competitive advantage.

A Forrester report showed that better decision-making and forecasting extend the benefits of RevOps as it provides growth leaders with greater visibility into improvement areas and opportunities for growth. Consequently, organizations with tighter go-to-market alignment grow revenue 58% faster and are 72% more profitable. And that's not all.

**Boston Consulting Group's (BCG)** report also highlighted similar benefits of tightly aligned go-to-market functions such as:

- 100% -200% increase in digital marketing ROI
- 10%-20% increase in sales productivity
- 10% increase in lead acceptance
- 15%-20% increase in internal customer satisfaction
- 30% reduction in GTM expenses



# 4 Pillars of the RevOps Model

## Process Optimization

Establish a standard process across your team to deliver a consistent customer experience across the customer journey. Processes to revisit under this new model include lead management, opportunity management, deal closure, customer onboarding processes, and more.

## Data Management and Analytics

Provide access to the same data set to make informed, data-backed decisions that result in predictable revenue growth. This means monitoring and measuring key performance indicators (KPIs), identifying areas of improvement, and leveraging data to uncover new areas of growth like cross-selling and upselling opportunities.

## Technology and Tools

Your tech stack is the lynchpin of your entire revenue operations. It's what connects your entire team to ensure strategic alignment, collaboration, and streamlined processes. But it should also give you and your team a comprehensive, 360-degree view of your customers. As you work on selecting the right tools, keep this in mind as you evaluate which ones to implement and integrate to achieve your goals and get a full picture of your customers.

## Organizational Alignment and Culture

RevOps requires a fundamental shift in your organization's DNA. Go-to-market functions must operate as a single revenue team for RevOps to work. Focus on fostering a culture of collaboration, transparency, and continuous improvement. Ongoing communication, education, and support from leadership are also required to ensure and maintain alignment.

## Previewing the Four

Revenue Operations is more than an organizational structure. It's a mindset shift in how teams work together to generate revenue growth. Through RevOps, you gain a holistic view of your entire organization, enabling you to better understand your customers and revenue streams. At its core, the Revenue Operations framework is built on four pillars.



# Implementing a RevOps Framework

## EIGHT CRITICAL STEPS

Implementing RevOps requires a strategic and systematic approach. It's a mindset shift in how an organization operates and works, which means ensuring you're getting buy-in early in the processes is key. So how can you ensure you're taking the right steps in implementing this structure? Here's the approach we typically advise our clients to take that has proven successful.

### Step 1: Define Goals and Objectives

### Step 2: Assess Your Current State

### Step 3: Establish the RevOps Function

### Step 4: Standardize and Optimize Processes

### Step 5: Build Your Tech Infrastructure

### Step 6: Establish Key Performance Indicators

### Step 7: Document Data Management and Analytics Best Practices

### Step 8: Monitor, Iterate and Share Results

- Customer Relationship Management
- Marketing Automation Platforms (MA)
- Content Management Systems (CMS)
- Sales Enablement Platforms
- Reporting and Data Analytics Tools
- Attribution Modeling
- Personalization Capabilities

**"Leadership should start by diagnosing the current state of Their GTM processes and the operations behind them."**

*Source: Revving Up Go-To-Market Operations in B2B, Boston Consulting Group*



# Common RevOps Challenges

Roadblocks will happen whenever you're shifting to a new way of operating. And we've seen our fair share of challenges that can hold an implementation back. Here are the top four we've seen.

## **Resistance to Change**

A shift in processes, roles, and infrastructure can spark fear in employees. This can make them uneasy and resistant to change. Overcome this hurdle by using clear and consistent communication when explaining the shift to the new model. Leveraging change management best practices can prove fruitful in facilitating a smooth transition.

## **Inadequate Technology and Data Management**

The effectiveness of your RevOps program is greatly improved with the right tech infrastructure. Set yourself up for success by auditing your current tech stack. Then map your customer journey and cross-compare it with your tech audit to identify gaps and tools you need to run operations successfully. The key here is to focus on gaining a 360-view of your customer in one place.

## **Lack of Clarity in Roles and Responsibilities**

Redefining roles and responsibilities or creating new ones are bound to happen with RevOps. But it can cause confusion if not properly communicated to your go-to-market teams. Reduce confusion by documenting your RevOps structure and clearly defining roles and responsibilities. Share the new approach with team members on one-on-ones and hold regular training sessions and workshops as needed.

## **Insufficient Resources and Expertise**

Lack of expertise and resources are cited as top challenges that hold companies back from adopting RevOps. Workaround this gap by engaging with external experts or consultants to help you quickly build your RevOps programs. B2B marketing agencies like Trevelino/Keller can provide the support and expertise you need as you get started.





# Metrics To Keep An Eye On

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You can't drive predictable revenue growth without data. Yet knowing what to measure and what to ignore can be difficult. The solution? Select a few key metrics that best fit your goals and objectives and then explain the relationship between them and your business goals with your go-to-market teams. While this isn't an exhaustive list of possible Revenue Operations metrics you can track, it can provide some ideas on what will fit your needs best.

## **Revenue Growth**

Revenue growth is the measure of your company's ability to generate income and sustain operations. A positive growth rate provides insights into the company's financial health, growth potential, market position, and demand. Tracking this metric over time helps you identify market trends that can help you pivot and adjust your revenue operations strategy as needed.

## **Forecast Accuracy**

Forecast accuracy refers to your company's ability to predict revenue successfully as a percentage. It helps determine how well you can predict sales, how well your business manages its sales, and whether it brings in enough money.

## **Sales Cycle Time**

Sales cycle time refers to how long it takes for a prospect to convert into a customer. Knowing how long your deal cycles are can provide insight into how to expedite the process and makes it easier to predict revenue more effectively. High velocity means the sales process is organized and structured. A slower velocity can indicate problems within the sale cycle.

## **Pipeline Velocity**

Pipeline velocity is the time it takes for a prospect to move through each phase of your revenue pipeline. This metric provides insights into optimizing your funnel by seeing which parts of the revenue cycle prospects spend the most time in.

## **Renewals and Upsells**

Renewals and upsells refer to the revenue you can expect to generate from selling new products/services to existing customers or extending their contracts. This number enables you to predict revenue by identifying your top customers.

# Metrics To Keep An Eye On

## START RENDER VS BOUN



## SESSIONS

### Sessions (LUX)

**479K**

4 pvs

3.2 pvs

2.4 pvs

### Cost-Per-Acquisition (CPA)

CPA is the cost to acquire a new customer, such as advertising spend and promotional projects, among others. This metric enables you to identify areas to cut costs and improve efficiency — helping you maximize the return on investment for your revenue activities while increasing profitability.

### Total Contract Value

Total contract value is the value or worth of a contract. By calculating this number and cross-comparing it with your customer acquisition cost (CAC), you can determine the ROI of your efforts, which enables you to craft a profitable strategy that will benefit your company in the long run

### Average Revenue Per User (ARPU)

ARPU is the worth of every active customer over a time period. This metric explains how many customers you need to sustain your business. It also gives you insights into product-market fit across your target audience, the effectiveness of your marketing efforts, and your business's financial performance.

### Revenue Backlog

Revenue backlog is the amount of unreported revenue. This calculation measures how much money you need to collect and identifies whether you bring in enough revenue for your objectives. It also provides insights into potential growth areas and revenue opportunities and can help you plan for future production and capacity needs

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### Days Sales Outstanding (DSO)

DSO is the average amount of time it takes to collect payment for a sale or service. A high DSO can impact cash flow and the overall health of your organization. Tracking it can help you identify needed workflow improvements to reduce the risk of financial instability and improve cash flow.





# Getting Started with RevOps



The time is now for RevOps. Best-of-breed companies have proven this and are increasingly making the shift to revenue operations. Gartner predicts that 75% of the highest-growth companies in the world will deploy RevOps by 2025. But ensuring you implement RevOps correctly means identifying every possible scenario that could impact adoption and working around it to ensure your program is headed in the right direction. This can make standing up RevOps complex — expanding your lead time to get it running.

As a B2B marketing agency, we've seen what works and what doesn't. Our work with clients spanning SaaS, Technology, FinTech, and more has given us unique insights on maximizing your return on investment. From identifying the right channels to the technologies you need to make it happen, we can provide you with a roadmap for getting started.

To learn more about our capabilities or to get an initial take on how we can help, reach out to our team today to explore how Trevelino/Keller can help support your revenue operations goals.