



# WHAT IS REVOPS?

WITH





## WHAT IS REVOPS?

In practice, revenue operations (or RevOps) align marketing, sales, and customer success teams through the customer lifecycle to drive revenue growth.

It's about the technology, processes and strategy of creating a revenue machine.

Traditionally, each department within a business has its own operating function and they each report to the head of their division. This means sales operations report to the Head of Sales, marketing operations report to the Head of Marketing, and so on. Each team has their own set of goals, tools and priorities and, for the most part, it works.

The challenge with this way of working is that each division is separated. The goals and priorities are all different and this makes coordination and alignment a lot harder to implement. The incremental improvements are falling through the gaps.

Through better collaboration and visibility, RevOps provides focus on closing gaps in the customer lifecycle through improved operational efficiency. These gaps span across people, data, processes, technology, and team accountability.

Now, picture an orchestra. When you start to think about what makes a good RevOps function in a business, think of it like building an orchestra from scratch. The end goal is to get everyone to play their part of the same song, at the same time.

So, how do we get to this state of optimal growth?

Short answer, It's not easy and requires an in-depth examination of your entire business. Focus on what is working effectively, what is just barely working, and what is not working at all.



# Growth of RevOps in businesses



Since 2019, there's been a 300% increase in RevOps-related roles on LinkedIn. In addition, we've seen a 57% increase in companies implementing RevOps strategies or building RevOps teams.

Here are some additional statistics that speak to its impact:



**10-20%**  
increase in sales  
productivity



**15%**  
increase in  
profitability



**19%**  
increase in  
speed of growth



**71%**  
improvement  
in stock  
performance



**100-200%**  
increase in digital  
marketing ROI



Marketing ops, sales ops, and go-to-market teams may already have an operations person assigned to their specific silo, and the results for the business may already be satisfactory.

So, why bring all of these teams together?

Well, according to HubSpot, 60% of operations professionals end up with repeated work due to a lack of team alignment. When teams aren't doing what they are meant to, which is working together, everything goes downhill. From a business perspective, targets are missed, goals aren't seen through, and frustrations from a lack of communication rise. When everyone is on the same page, it's a lot easier to see the path forward to success.

“

**If you want to go fast,  
go alone. If you want to  
go far, go together.**

Once you get the synergy going between these teams, the positive impact on your business will be substantial. There's no need to start from scratch, either. Feel free to use some of your current resources (like your tech stack) to start moving towards real revenue growth.



## THE ORIGIN OF REVOPS:

# 6 ways SaaS has changed relationships between customer and business

In a business deal, most revenue is achieved after the point of sale. Customers have so many options in front of them, and while evaluating these options, they are typically in search of an experience that feels personal to them.

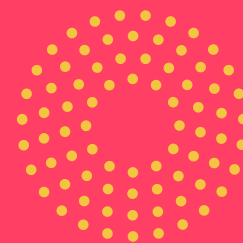
To provide this type of customer experience, you'll have to spend some cash upfront. But, the money you'll likely spend to secure a customer (or the cost of acquisition) is only a small fraction of what you can expect to earn from them over the course of their customer lifecycle. These earnings can come in the form of upsell or cross-sell business, as well as referrals.

Look at the customer lifetime value over the value of the initial deal size. Once you recognise and accept this, you'll be able to shift your energy towards fostering customer loyalty.

### **These are the 6 main ways SaaS has altered relationships between customers and the businesses they buy from:**

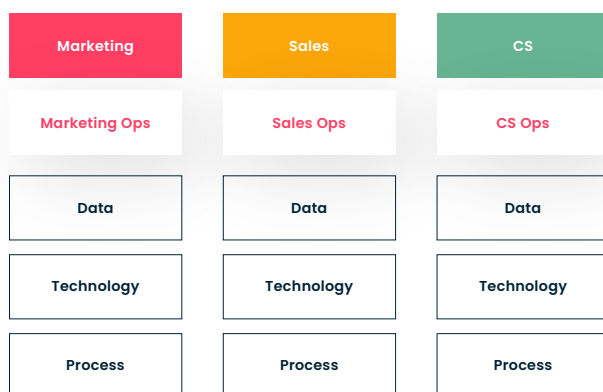
- 1 Most revenue is achieved after the point-of-sale.
- 2 Traditional funnels are dead, and now customer journeys are non-linear.
- 3 Customers have thousands of options at their fingertips.
- 4 Customers are consistently demanding a more personal, frictionless experience.
- 5 There are typically more stakeholders involved in a purchase decision.
- 6 The rate of change is ever increasing.

# How to break down silos for go-to-market teams

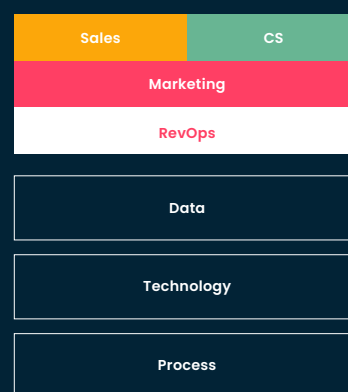


## Breaking down silos for go-to-market teams

### BEFORE REVOPS



### WITH REVOPS

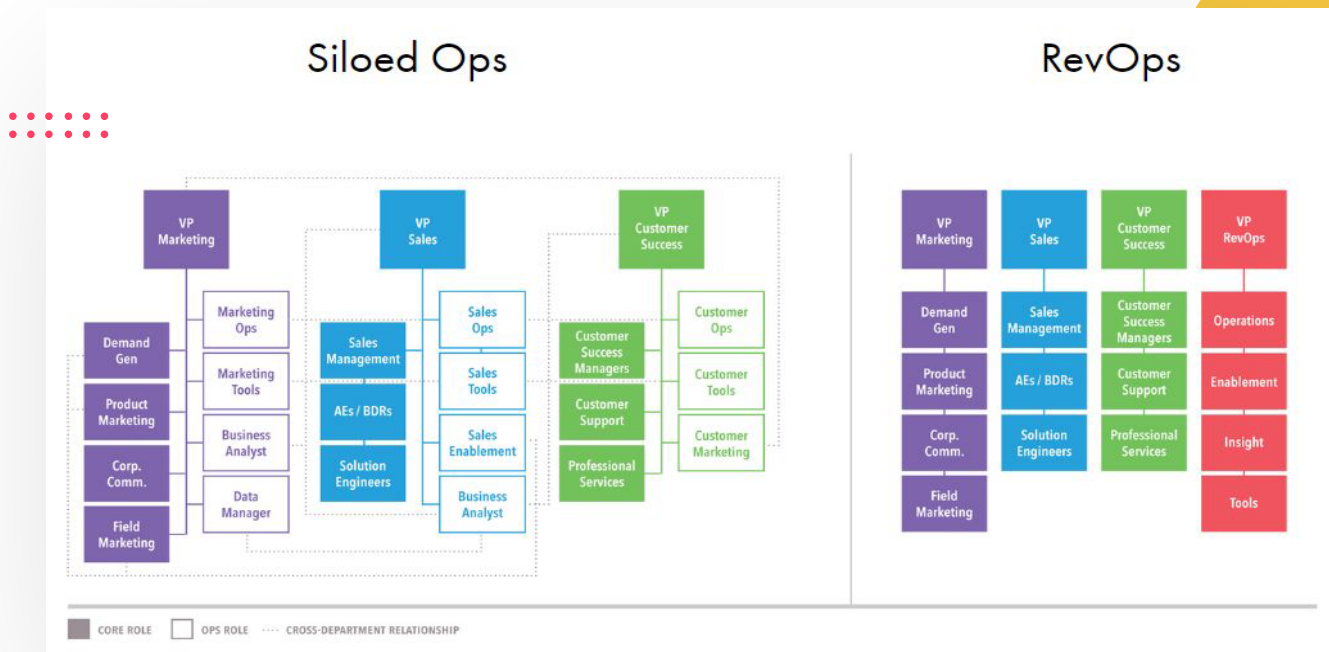


When it comes to the go-to-market model, marketing and sales departments often operate with their own data sets, knowledge, and processes. Once the customer is in the post-sales stage of the customer lifecycle journey, customer service builds up its own unique experience with that customer that is separate from the other two teams.

Once RevOps is at play in the go-to-market arm of a business, it's easier to recognise sales, marketing, and customer success as a single function instead of siloes.

The three main components that should be aligned between these teams are data, technology, and processes. Once you're in pursuit of implementing a RevOps strategy in your business, having a consistent approach is the cornerstone you should focus on.

# Breaking down silos for go-to-market teams



Ideally, the VP of RevOps (should you choose to have one) will sit at the same table as all of your other go-to-market team leaders. Since they have the vision around the best RevOps strategy for your business, they shouldn't be viewed as a subordinate.

You hired them to bring in the best plan for achieving revenue growth, so let them and their team handle the strategy around objections, team enablement, gathering insight, and using tools.

## The 5 main benefits of RevOps

### FROM

Time wasted comparing info

Tension created in hand-offs with "it's not me, it's them" attitude

Individual reports and processes

Subjective forecasting and many "make or break" months

Everyone working for themselves in isolation

### TO

Data-driven decision-making and better collaboration

Complete visibility and accountability across all teams

Single source of truth shared by everyone

More consistent and predictable pipeline and business growth

Better customer experience leading to higher win rates and faster sales cycles

In a nutshell, think of these benefits as:

- ▶ Making better decisions faster
- ▶ Getting the right data in hand to make those decisions
- ▶ Building trust and predictable pipeline

The biggest challenge of “selling” RevOps to your fellow team members is explaining the value through the benefits. This stems from its newness as a business concept. When approaching your go-to-market teams with this idea that may be new to them, two talking points to keep in mind are:

- ▶ Having a codified, replicable process will help deals close faster
- ▶ As a whole, the organisation can have a more consistent approach to scaling

## 6 pillars of RevOps

If you take anything from this guide, let it be the following pillars:

Pillar	Summary
Data	Data health, data infrastructure, data administration, data stewardship
Customer processes	Customer journey, sales process, segmentation, QBRs, renewal, expansion
KPIs and reporting	KPIs, business development, pipeline management, forecasting, account retention, account expansion, sales performance
Tech stack	Evaluation, acquisition, administration, integration, utilisation
Enablement	Personal development, training, coaching, onboarding
Strategic insight and planning	Goal setting, target accounts, revenue opportunities (analyse “best deals” and market)

# Key performance indicators (KPIs) for RevOps

## KPIs for RevOps

Cost of Customer Acquisition	MRR/ARR	Renewals	Upsells/Cross-Sells	Customer Churn
LTV	Forecast Accuracy	Pipeline Velocity	Sales Cycle	Win Rate
Lead Relationship Score	Opportunity Relationship Score	Account Relationship Score	NPS	Revenue Per Employee

Pssst... Want to know how you compare? Drop me an email to get early access to our Benchmarks Report from \$100BN+ B2B pipeline analysis

There are several key performance indicators (KPIs) to pay attention to when it comes to RevOps. When you're building out your RevOps function, the three main things to evaluate are:

- ▶ Customer churn
- ▶ Revenue per employee
- ▶ Account relationship score

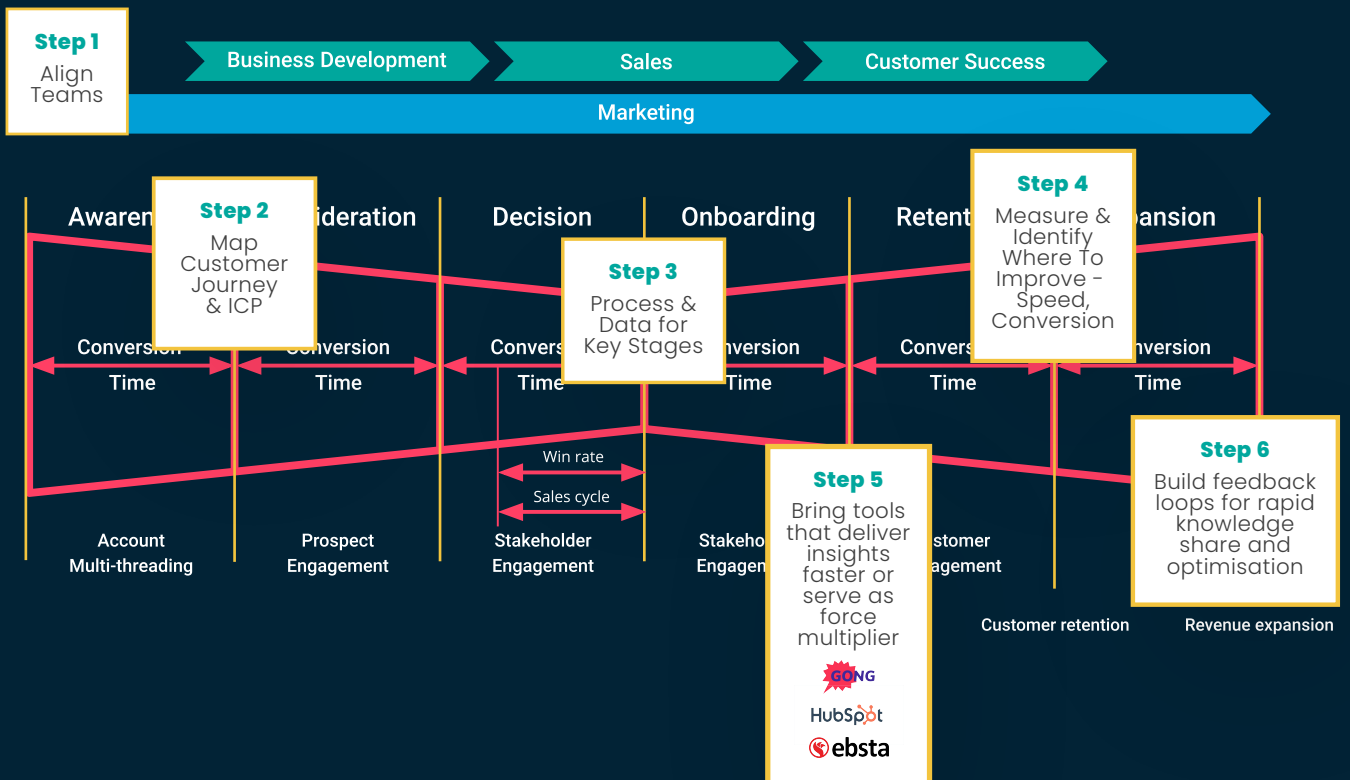
Have an open and honest conversation about these KPIs in your go-to-market department. No one likes to talk about churn, but it's best to be honest about what this number looks like so that you can all band together to fix the hole in the proverbial bucket.

Revenue per employee is straightforward, and a number that every quota-carrier should be aware of and be ready to speak about.

Last but not least, relationship scoring involves getting a deep understanding of what customer relationships are strong and which could use more attention. At the end of the day, relationships drive revenue (as we touched on with customer lifecycles).



# How to build a revenue machine



## 1. Align teams.

Onboarding is a key component and should be revisited to foster alignment, especially on a growth trajectory. Although it's typically thought of for new employees, when it comes to implementing any sort of new processes, technology, etc., it's important to have everyone on the same page regardless of tenure.

Once you have your people aligned on what to expect from your RevOps strategy, you can move on to the process. This can include everything from outreach tactics, to data dissemination (i.e. when, where, and how often to share key metrics), to sharing feedback at all levels.

Lastly, you've got to consider alignment on how to use new technology that may now be in the mix. You rarely get people all for adopting new technology right away, but if you choose tools that have a clear path to success and value, and focus on the overall benefits to both the individual and the business, things should progress smoothly.

## 2. Map the customer journey and Ideal Customer Profile (ICP).

Get into detail and start working on this before the first meeting happens. Make sure everyone is on the same page with who your go-to-market teams should be targeting, what their common pain points are, what their typical business goals are, and how your product or service offering is going to solve their problems.

If there's a clear picture of the results your organisation can provide to customers, it's a lot easier for go-to-market teams to centre these conversations around current and future customers, and tell a compelling story that gets them in the door, and keeps them loyal to your organisation. If you're able to show the value effectively, it'll be hard for them to picture life without your product or service.

## 3. Process and data for key stages.

Ensure your team members are given access to data at the right time to reduce and standardise the sales cycle. One way to think about the key stages is to follow HubSpot's lead; awareness, consideration, decision. Going about your RevOps process in these stages is a great way to put your team in the same mindset as your potential customer. As consumers themselves, it probably won't be a hard concept to get across.

Think of the "awareness" stage as the first impression your organisation makes on the customer. They could be coming across your website for the first time, and digging around before as they make their shortlist of vendors to consider. What does your first impression look like right now? Is it a good one? Make sure that it is.

The "consideration" stage is when the customer is weighing all of their options. They're thinking about things like pricing, onboarding, ease of use, and even your company's values. Like your first impression, there is also a secondary impression stage, and sometimes the decision can be emotional. With this in mind, arm your go-to-market team members with the tools and resources they need to be successful in continuing the conversation. Don't set them up for failure.



Lastly, the “decision” stage is when the customer in question decides which product or service is the best fit. By the time they get here, they should have all of the information they need to make the right decision for them. Ensure that you have everything in place for this to happen before they reach the decision portion of their buyer’s journey.



#### **4. Measure and identify where to improve when it comes to speed and conversion.**

Keep in mind that incremental improvements can have exponential results. As we like to say, slow progress is still progress. As you go down the road of RevOps, don’t be shy about iterating on your current process and getting rid of the fluff that isn’t actually helping your team or your business.

If you can cut your tech stack, do it. If you need new documentation or templates for your sales team, get them created. No matter the changes you make, as long as they promote efficiency and unity in your team, you’ve likely made the right decision.

#### **5. Bring tools that deliver insights faster or serve as force multipliers.**

Make sure that whoever’s leading the charge with RevOps also puts a focus on getting the right tools from the right vendors (like HubSpot). Sure, the process of evaluating and implementing new technology is daunting, and it’s certainly not appealing when you have to consider the scepticism of some people on your team. However, if you have someone that’s dedicated to choosing tools that will actually create efficiencies (and probably result in more money made), it’ll be easier to push the agenda for technology adoption along.





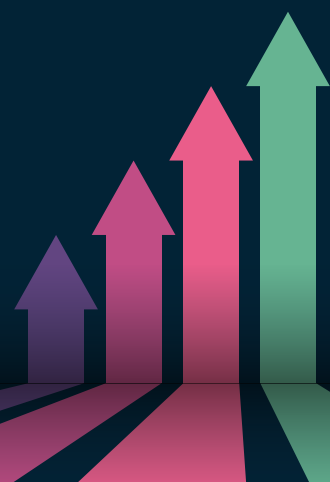
You don't have to start your tech stack from scratch, either, but make sure that you're being objective in evaluating what tools you already have. If they're not helpful to your team or your business, let them go.

The tools you choose will depend on the maturity of your business, therefore it is inevitable your tech stack will develop over time. In the short term, select tools which provide the most value to your teams and enable them to deliver greater results. With your CRM as the foundation, consider software that provides increased visibility of your pipeline across sales. This can include revenue intelligence platforms like Ebsta and Drift, or marketing platforms like HubSpot.

## **6. Build feedback loops for rapid knowledge sharing and optimisation.**

Make sure everyone in your go-to-market "orchestra" is on the same page of the "song." Don't let the fear of shifting gears or making changes stand in your way, either. As you go about implementing your RevOps strategy within your organisation, be sure to encourage openness and transparency within your team.

What does transparency look like? In this case, prompt people to give feedback on how the process is going in real-time. Of course, you may not be able to act on every change suggested, but the sooner these things come to light, the sooner they can be acted on and optimised for success in the short and long term.





# The RevOps End State

By Implementing RevOps, your business can cultivate a high-performance environment with stronger win rates, shorter sales cycles, and better deal values. You can then begin to tap into insights and optimise demand generation, sales management, and service teams and ultimately create a repeatable and scalable revenue engine.

How does this look across your people, processes, technology and insight?

## PEOPLE

- Staff are fully aligned with the core objectives of the company.
- Staff fully understand systems and are driving performance, new ideas and/or are fully engaged.
- Across the business you have the right people in the right roles.

## PROCESSES

- Processes are fully mapped in details and staff are working with frameworks alongside clear processes.
- Staff can complete daily activities and efficiency is high. Staff are intellectually engaging with structures and direction

## TECHNOLOGY

- Tools and technology exceed the advanced requirements of the business.
- Excellent internal understanding of how to use tools

## INSIGHT

- Information is readily available and actionable across systems and staff
- Reports are real time
- Figures are fully trusted by key staff and can be contextualised by all departments



And, how is your funnel optimised for better results?

## DEMAND GENERATION

- You channels are fully optimised, performing and you have understanding of what is driving the majority of traffic & revenue
- You have robust Personas and ICP in place so your marketing is targeted and contextual
- You are running campaigns aligned to an overarching structure with a clear view on revenue impact
- You have multiple performing channels for demand gen efforts with a balanced split of effort

## SALES MANAGEMENT

- You have robust qualification in place across all of the team
- You are able to forecast accurately for a long timeframe
- Your sales team performance is well balanced
- Your sales team are equipped with a range of effective tools to drive performance
- Your staff real time data to prioritise effectively

## SERVICE

- You have a range of structured surveys in place and can analyse the data across the lifecycle
- You have a ticketing system in place with a clear structure and multiple functions
- Your comms with the client are consolidated and structured to allow for quick resolution
- You have a robust measure for client health present in the CRM



# Incremental gains in RevOps

Long story short, you don't want to underestimate the value of a well-oiled revenue engine. Here's why:

## Marginal gains will compound over time

Leads	Conversion Rate	Conversion Rate	Win Rate	ACV	ARR
100	0.3	0.2	0.2	\$10,000	\$12,000
100	0.35	0.24	0.25	\$12,000	\$25,200

Once your RevOps strategy and practical applications are up and running, you'll start to see the fruits of your labour. But, don't be surprised or discouraged if you don't see results right away. It's going to take time for people on your team to adjust to this new way of operating (pun intended).

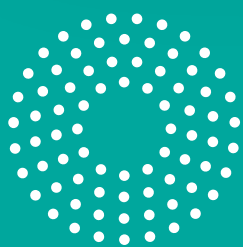
Onboarding and implementing are both short term pains that will result in long term gains. Think about the bigger picture, and be willing to put in the work overtime. The real key to success with RevOps? Just getting started. The sooner you start, the sooner you can improve your processes, and then sooner you can see results.

# 7 common RevOps challenges to avoid

As a newer concept in business, there are tons of things to consider when it comes to implementing RevOps. Whenever there's a huge change coming to a business, you'll see sceptics and naysayers all around. Try to focus on articulating the benefits of a RevOps model from a growth perspective. At the end of the day, all go-to-market teams should be focused on growth in the form of revenue anyways.

Although there are countless challenges to overcome, here are 7 common ones to watch out for:

- 1 Lack of buy-in from business leaders
- 2 Lack of alignment on customer journey
- 3 Lack of internal expertise or ownership
- 4 Lack of budget
- 5 Too much technology
- 6 Lack of feedback loops
- 7 Temptation to "put a plaster over the wound"



# Frequently Asked Questions about RevOps



**What does a RevOps team look like and how does it scale with company size? What skills are needed? And how do you get started building a RevOps team?**

A: Different teams are going to need different resources. Start with a leader; get someone who has experience in this area. Be brave, as no one has all the answers as to what they're hoping to achieve with RevOps. RevOps is not an admin function, but strategic.



**Is the VP of RevOps the same as a CRO?**

A: No, CRO should instead be working alongside the VP of Revenue Operations. People in RevOps don't need to be good at running a sales process themselves. CRO needs to understand the commercial side and drive the business forward. RevOps needs to understand data, processes, and technology that will support GTM teams.



**What size of company do you expect to have a separate RevOps team?**

A: Depends on the operation and what you're trying to achieve. Smaller, more agile companies, for example, may not have the resources to hire multiple roles in a RevOps team framework; however, they can take steps towards overall team alignment by establishing an internal RevOps committee formed by leaders within the different GTM departments. This way, conversations and decisions can be focused around overall company goals, and initiatives can be planned and executed based on shared understanding between teams.





Medium to large-sized organisations with more resources available towards growth will want to take steps toward building a dedicated RevOps team and consider widening the mandate to include ownership of business insights, tools and processes, or training and enablement alongside general operational ownership.

Typically medium-sized businesses will begin by hiring for roles attached to specific teams (Sales Operations, Marketing Operations, etc.) However, it's important to ensure that these roles are moving in lockstep with your internal RevOps committee to prevent the silos from forming within the business.

Larger organisations, and organisations with more complex needs or hierarchies, will absolutely want to hire a Revenue Operations leader or executive to sit alongside the executives of other teams to foster alignment, drive strategic conversations, and own and champion any RevOps-related initiatives across the business. This may require some internal restructuring, but it is important to bring staff, process, and knowledge together under one operational umbrella that is fully aligned with the wider company goals.



**Most GTM teams have siloed tech stacks. How do you best manage the transition given the level of disruption when it comes to ripping and replacing tech?**

A: It doesn't have to be a rip and replace situation. Start by having one function responsible for all of it. Let the operation be responsible for what they're good at. So many efficiencies can be brought by first getting everyone on the same page. Tiny changes at each stage of the process have exponential growth.



**How is this different to a modern marketing team with a cross-functional growth team targeting improvements at each stage of the customer lifecycle?**

A: Focused RevOps function leads to a consistent message all across the organisation.



**Do you think that every scaleup needs to employ this discipline at the start and then avoid siloed conflict at a later stage?**

A: Revenue Operations is a framework to aid in the growth of your business, so the earlier this framework is considered, the easier it will be to align your internal resources, which reduces the friction when the time comes to scale in earnest.

The earlier you can justify, the quicker you can scale. Get the right people in to help you run faster.



**Which parts of the existing organisation show the most resistance to this approach?**

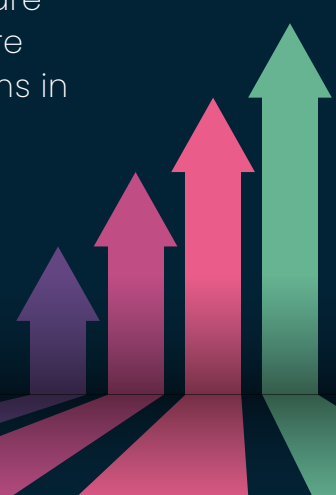
A: Sales is usually the first to push back. With strong management, this can be avoided. The whole point is to generate more efficiency for scale, and more revenue for the organisation. Ultimately, sales want to earn more money. Even if they grumble, stick with being consistent. Imagine the opportunity. Don't see the shortsighted nature of sales be a deterrent; you want them focused on the next deal.



**What skillset would a RevOps person need?**

A: Think about what they were doing before the term started to gain popularity. It would be people responsible for leading SDR teams, or responsible for GTM tech and getting the word out within an organisation. Maybe they haven't had the freedom or recognition to flourish. Look forward to a track record of success whilst fighting against a tide.

Data-minded individuals & strategic or big-picture thinkers who are comfortable working with different technologies and data sets are excellent candidates for RevOps roles. People working within teams in specific functions (e.g. sales development) also make for great candidates as they develop deep knowledge of internal processes and areas for potential improvement.



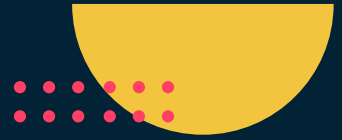


**On average, how long would you expect it to take to implement a RevOps strategy?**

A: Every organisation is different. Even when it's in place, then the cogs need to start moving. Nothing is left to chance in the GTM functions—we have data between our approaches now.



# WHO WE ARE



## SIX & FLOW

Six & Flow is a revenue-focussed growth agency with offices in Manchester, London, Dublin, and Toronto.

We consider ourselves a performance lead agency, working across strategy and technology to help our clients grow revenues.

We work closely in collaboration with our clients to provide them with a clear return on investment and achieve truly impressive results. We're with them at every stage—creating a digital strategy and managing all aspects of delivery. We're working across a range of leading and emerging digital channels to help businesses grow their brand, their audience and their profits.

We're hands-on with implementation projects: from scoping, to data cleansing, to full implementation and integration of platforms.



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# WHO WE ARE



## EBSTA

At Ebsta, we are leading the revolution of relationships. We believe every sale can be made stronger through relationships. To deliver on this, our revenue intelligence platform enables sales teams to track, measure and understand each account and contact, right the way from the initial conversation, all the way through to closing the deal.

Since our foundation in 2012, we've evolved from our Inbox tool which allows you to measure engagement, to a fully-fledged revenue intelligence platform, which delivers insight to reveal how those relationships are impacting your win rate, sales cycle and average deal value.

Our goal is to quantify the immense impact relationships and engagements have on every deal, and demonstrate how focusing on improving these two core areas will drive revenue growth each quarter.



[www.ebsta.com/contact/](http://www.ebsta.com/contact/)

