



Implementing Revenue Operations 201



Revenue Diagnostic,
Mapping, and Benchmarking

By the end of this course, **you will know:**

1

Revenue Engine Diagnostic

- Understand what this comprehensive assessment of the revenue journey entails

2

GTM Survey & Analysis

- First step of the diagnostic; understanding your current state + ideal goal for GTM

3

Revenue Mapping

- Tangibly deconstructing the path revenue takes throughout your business & pinpointing gaps/friction

4

The Experience Audit

- First-hand understanding of how customers interact with your sales/product/marketing

5

Benchmarking Data

- Establishing trusted reporting to understand current state and evaluate growth

6

Building the Roadmap

- Creating a strategic path to achieve growth through segmented project plans and task sequences

1

Class 1

Revenue Engine Diagnostic

Repeat

Measure

Act

Building upon **the foundation**

Building Blocks

GTM
Motions

Data
Model

Business
Model

Secondary
KPIs

Primary
KPIs

Implementing **RevOps**

GTM Survey

How we see our
business

Revenue Mapping

How revenue flows
within our business

Experience Audit

How users experience
the business

Benchmarking
Dashboard

How our CRM sees
our business

90 Day Project
Plans

How we actually
achieve our goals



The Revenue Engine Diagnostic (R.E.D.) is **a top-to-bottom examination of your entire revenue and customer journey.**

It is a visual record of **how people find, experience, and patronize your business,** with comprehensive notes on gaps, friction points, and areas for optimization.

The R.E.D. is how we establish **the path from “current” state to “ideal” growth potential.**



Objectives & **Outcomes**

R.E.D. Goals

- **Capture current state processes for Marketing, Sales, and Customer Support**
- **Establish prioritized list of ideal goals for growth and revenue**
- **Create a hyper-focused roadmap to achieve those goals and attain growth**

R.E.D. Outputs

- **Exposes gaps in handoff, friction points, dead ends, and process silos**
- **Codifies and visualizes departmental procedures**
- **Identifies “what’s working” to optimize and capitalize on successes**
- **Clarifies goals and ensures alignment/transparency between departments**



The purpose of a Revenue Engine Diagnostic (R.E.D.) is to provide a **strategic viewpoint** from which to examine your business and processes comprehensively and to objectively examine each component of your revenue engine.



Why is the R.E.D. **important**?

In addition to creating clarity around the current state, a Revenue Engine Diagnostic ensures alignment:

Cross Departmental Priorities

- Understand how actions impact other departments to reduce friction and increase efficiency

Project Priority

- Define what will occur and in what order to create a stable foundation for execution

Measuring Success

- Establishes the benchmark and identifies how success will be measured to clearly outline growth (or lack thereof)

Milestones of **the R.E.D.**

1. **GTM Survey**

High-level overview of how your Business Operates

2. **Experience Audit**

Exercise to review how a prospect/customer experience a specific part of your journey

3. **Revenue Mapping**

Mapping out your customer journey in visual format from first interaction to recurring impact

4. **Benchmarking Dashboard**

Tracking key KPIs to enable data insight collection

5. **Strategic Roadmap**

Organizing and prioritizing key initiatives for next quarter

End of Class 1





Implementing Revenue Operations 201



Revenue Diagnostic,
Mapping, and Benchmarking

2

Class 2

Go-To-Market Strategy
Survey & Analysis

Repeat

Measure

Act



The GTM Survey & Analysis is a collaborative exercise **designed to capture your unique business model, product landscape, and growth targets.**

Rather than just a list of stats, it's a structured "business identity" worksheet that gathers the core DNA of your Go-To-Market strategy.



GTM Survey: **Importance & Goal**

Importance

Without a unified GTM definition, growth is left to chance. This analysis is critical because it ensures that the solutions we build aren't just "best practices," but are custom-tailored to reflect what your business values most. It acts as a Strategic North Star, providing a single, living document that aligns your entire team on how you solve problems and create value for your customers.

Goal

The primary goal is to create total alignment between your business goals and your operational engine. By documenting your primary metrics and buyer personas, we move from "guessing" to "knowing." This allows us to build a system that captures the right data, measures the right people, and provides a clear reference point for future training and level-setting.

GTM Survey: **Milestones**

Overview

- Company High-Level
- Revenue Segmentation
- Revenue Goals

Success Metrics

- North Star Metric
- Source Data
- Dashboards in Use

Product

- Product Name, Description
- Product Type, Pricing
- Avg. Deal Amount, Sales Cycle and GTM Motions

Data Model Discovery Doc

- Recurring, Non-Recurring, Usage
- KPI Labels & Definitions
- Measurement Partitions & System Location

[illegible]

Example: Success Metrics

Metrics: How do you track success? How to segment deeper?

North Star Metric:	
Deal Source: (HubSpot Property)	
Specific Source: (HubSpot Property)	

Dashboards: Where do you track success?

Executive Dashboard	
Marketing Dashboard	
Sales Dashboard	
CS Dashboard	

Example: Products

Product Discovery							
Product Information			Revenue Information				
Product Name	Description	Category	Data Model	Pricing	Price	Frequency	Average Sales Cycle (in days)
			Recurring	Set Price		/month	
Onboarding	fill in this line item if onboarding to your product/service is considered a product						
Support / Maintenance	fill in this line item if support is a paid service or not offered as standard. Add additional rows if tiers.						

Example: Data Model Discovery



Data Model Discovery: Recurring

Left Side: Process Steps		Business Segment #1: Segment 1		
Data Model Location	KPI	Trigger	Primary Partitions	System: Object
V1	Session			Hubspot: Sessions
V2	Lead			Hubspot: Contact
V3	MQL			Hubspot: Contact
V4	SQL			Hubspot: Contact
V5	Opportunity			Hubspot: Deals
V6	Closed Won			Hubspot: Deals
V7	Closed Revenue			Hubspot: Line Items
V 7.A	Closed MRR	How are you calculating MRR? ie: sum of MRR line items on deal		Hubspot: Line Items
V 7.B	Closed NRR	How are you calculating NRR? ie: sum of NRR line items on deal		Hubspot: Line Items
Right Side: Recurring Steps				
V7.A	Net New			Hubspot: Deals
V8	Cross-Sell			Hubspot: Deals
V9	Expansion			Hubspot: Deals
V10	Downgrade			Hubspot: Deals
V11	Churn			Hubspot: Deals

GTM Survey

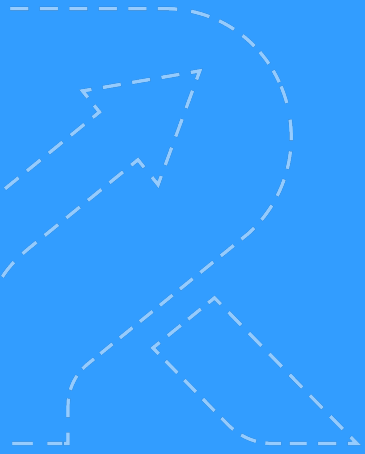
Demonstration & Resources

Repeat

Measure

Act

End of Class 2





Implementing Revenue Operations 201



Revenue Diagnostic,
Mapping, and Benchmarking

3

Class 3

Revenue Mapping

Repeat

Measure

Act



Revenue Mapping is the process of physically tracing **the path a dollar takes from a customer's pocket into your company's account.**

It's a visual blueprint of every marketing touchpoint, sales interaction, and operational handoff from first interaction to LTV.



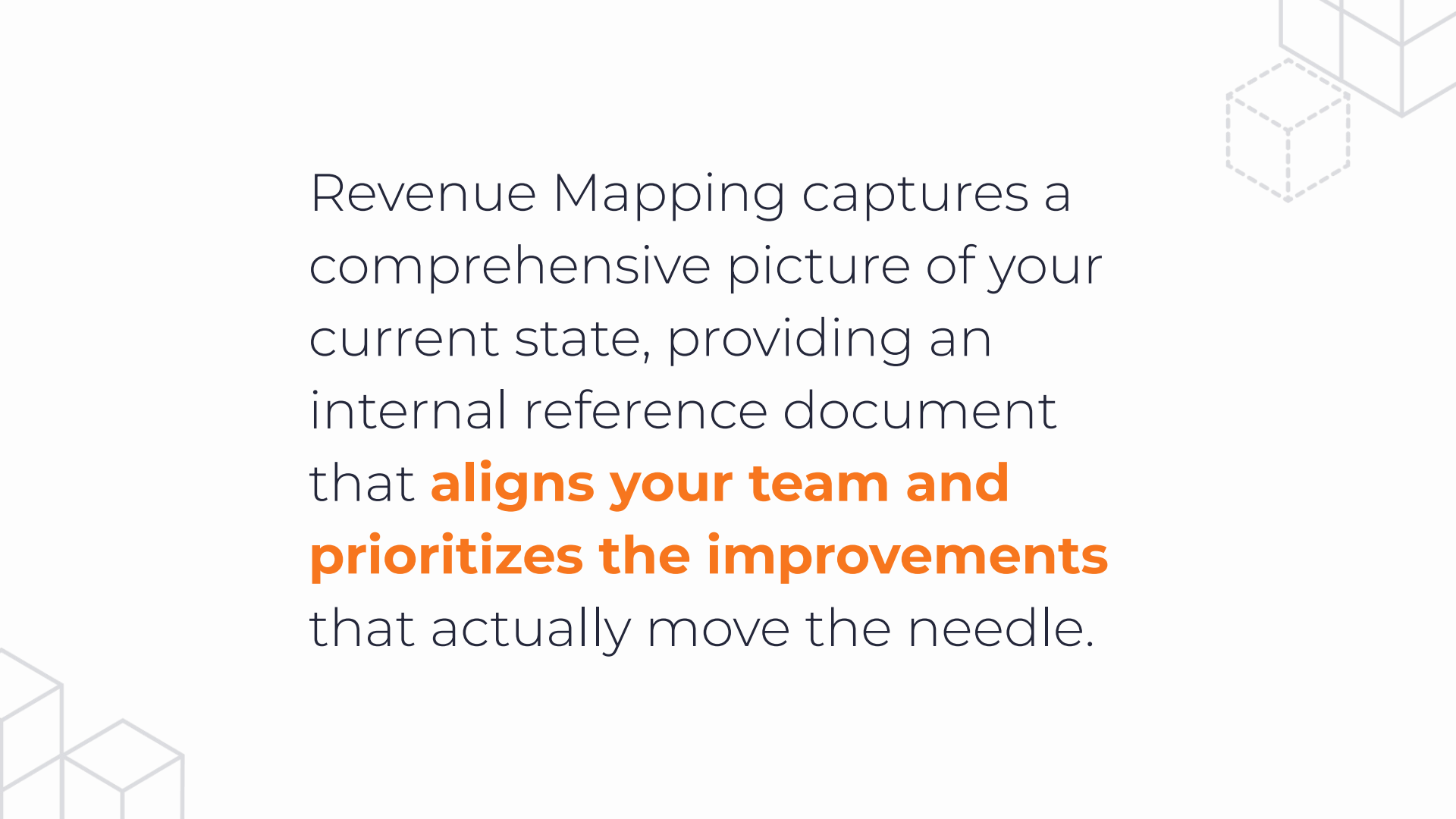
Objective & Importance

RevMapping Goal

To create a high-fidelity visual representation of how your business operates. By visualizing the flow, we can pinpoint exactly which gears are grinding, which systems are broken, and where we can grab quick wins to accelerate growth.

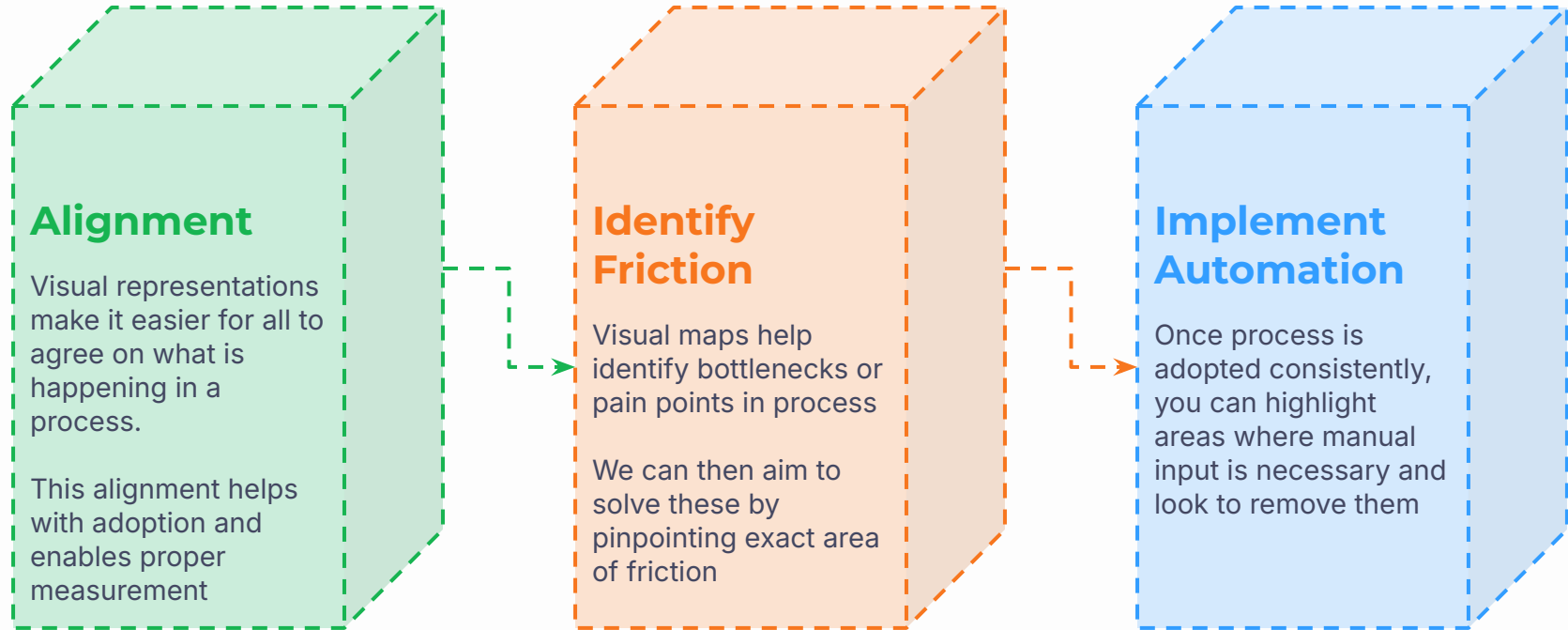
RevMapping Value

Your business is complex, and it's easy for teams to lose the forest for the trees. Revenue Mapping ensures every stakeholder understands exactly how revenue travels through each department and process and where the engine can be refined.

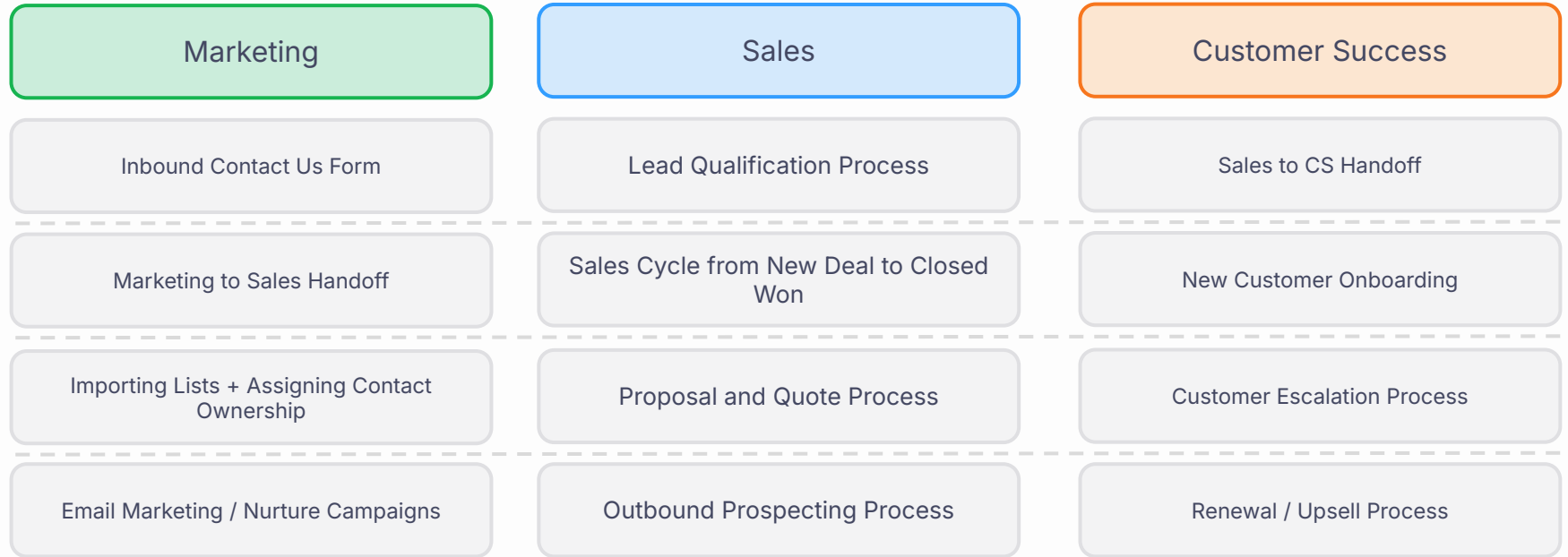
The slide features decorative geometric shapes in the corners. In the top right, there are three cubes: one solid and two outlined. In the bottom left, there are two outlined cubes. The main text is centered and reads: Revenue Mapping captures a comprehensive picture of your current state, providing an internal reference document that **aligns your team and prioritizes the improvements** that actually move the needle.

Revenue Mapping captures a comprehensive picture of your current state, providing an internal reference document that **aligns your team and prioritizes the improvements** that actually move the needle.

Why map out the **revenue journey**?



Common **Customer Journey**



How to **map the revenue journey**

Use Miro, Lucidchart, or another visual mapping tool and literally draw out the journey from start to finish:

First interaction

- Start with the very first interaction: how do your prospects find you/enter your CRM?

Map across teams

- Follow the journey through each interaction, across team handoffs, all the way through

Color code & organize

- Use different colors across teams and different shapes to indicate decisions or branches for clarity even at a glance

Capture current state

- Ensure you're mapping the reality and not just the ideal state

Revenue Mapping

Demonstration & Resources

Repeat

Measure

Act

End of Class 3





Implementing Revenue Operations 201



Revenue Diagnostic,
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Class 4

The Experience Audit

Repeat

Measure

Act



An Experience Audit is the process of **imitating the prospect's/customer's journey through your business processes firsthand**. It's a comprehensive walkthrough of your digital and manual touch points — from filling out a form to receiving a sales call — to see exactly what your customers see.

Experience Audit: **Importance & Goal**

Importance

This is the reality check for your Revenue Engine. It's where we compare what we think the process is internally with what is actually happening to the user. Understanding these minute interactions is the only way to truly optimize your RevOps Strategy from the outside in.

Goal

The goal is to audit the actual customer journey against your internal process map. We do this to ensure SLAs (Service Level Agreements) are being met, verify that data is flowing into the CRM correctly, and uncover hidden friction that prevents a prospect from becoming a customer.



The Experience Audit gives you an actionable list of broken/outdated processes, visibility into adoption, and **prioritizes areas of improvement.**

By aligning your tech stack with the human experience, you transform a clunky journey into a seamless revenue engine.



Experience Audit **Process**

An example Experience Audit walkthrough can be broken down into the following steps:

- Go to your website and fill out the Contact Us form (or equivalent)
- Go to your CRM and see what information was captured
- Map out the follow-up process
 - Automated email, manual email, call etc
- Map out the “no engagement” follow-up
 - Do contacts get removed from follow-up after a certain point?
- Review the qualification + disqualification process
- Look over all available reporting
 - Conversion rates, source data, etc
- What notifications are set up/automated?

Key Questions to Ask During the Audit

Processes & Workflows

- Is this journey automated, and can I actually find that automation in the CRM? (If it isn't, where does the process playbook live?)

Meeting Expectations

- Am prospects/customers receiving the follow-up exactly as our Service-Level Agreements (SLAs) say they should?

Reporting & Visibility

- Did my test record show up in the right reports? What metrics can I see and by which partitions can I review this data?

Adoption

- Ensure you're mapping the reality and not just the ideal state

Effort/Friction

- Which fields filled themselves out, and which ones forced a human to do the heavy lifting?

Experience Audit

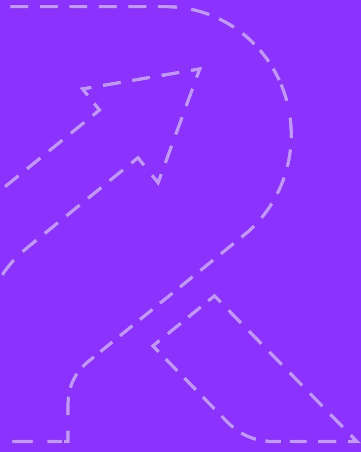
Demonstration

Repeat

Measure

Act

End of Class 4





Implementing Revenue Operations 201



Revenue Diagnostic,
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Class 5

Benchmarking the Data

Repeat

Measure

Act



A dual-purpose reporting tool: **the Benchmarking Dashboard**

captures both the “starting point” of your current state and provides reliable direction for your true KPIs.

It transforms raw data into a measurable roadmap for growth.



Benchmarking: **Importance & Goal**

Importance

You cannot see growth without a starting line. Without a benchmark, your optimizations are just guesses. We document the before state so that when we implement changes, we have a concrete baseline to prove the ROI of our RevOps optimizations.

Goal

The goal is to align your reporting with your actual business reality. We use the insights from your Revenue Mapping and GTM Survey to build — or rebuild — dashboards that reflect your true goals. Your benchmarking reporting delivers both data and direction.



By benchmarking your data, you have **a clean, accurate dashboard** that serves as the single source of truth for the entire team, ensuring every optimization is both measured against the “before” data and in line with your ideal growth strategy.



Benchmarking

Demonstration

Repeat

Measure

Act

End of Class 5





Implementing Revenue Operations 201



Revenue Diagnostic,
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6

Class 6

Building the Strategic Roadmap

Repeat

Measure

Act

The image features a light gray background with decorative geometric shapes. In the top right corner, there is a cluster of three cubes: one solid and two outlined. In the bottom left corner, there is a cluster of two cubes, one solid and one outlined. The text is centered on the page.

The **Strategic Roadmap** is a prioritized 90-day action plan that translates diagnostic findings into execution. It moves beyond a simple to-do list by organizing work into **high-level objectives** that tie every technical task back to a specific growth initiative or business goal.

90-Day Roadmap: **Importance & Goal**

Importance

A roadmap ensures that you are acting with intention and efficiency. By presenting a clear timeline to all stakeholders, you align leadership on priorities, manage expectations, and prove that you are actively working toward growth goals and moving the company up the GTM Maturity Framework.

Goal

The goal is to build a high-performance engine in manageable intervals. We break the work into three distinct task types or categories to ensure momentum and strategic depth: Quick Wins, Major Epics, & Ad-Hocs.

You walk away with transparent, company-wide guide to achieve your goals. It eliminates departmental friction by showing exactly what is being built, why it matters, and when it will be delivered.

The roadmap transforms RevOps functions into a visible driver of business growth.



Using the **Strategic Roadmap**

The roadmap doesn't end after 90 days; it's a living cycle. At every checkpoint, we return to the RevOps Flywheel to ensure we are:

Reviewing

- Are the process and data still organized?

Driving Adoption

- Is the team actually using what we built?

Creating Insights

- Does our reporting reveal new optimization paths?

Optimizing

- Where can we iterate to reach the next level of maturity?

90-Day Roadmap

Demonstration

Repeat

Measure

Act

End of Class 6

