



Building a Revenue Operations Foundation

Class 1

Introduction to
Revenue Operations 101

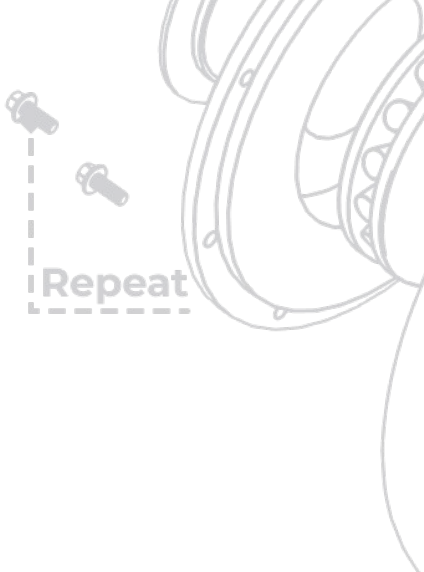




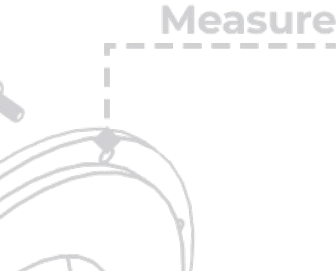
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Class 1

Intro to Revenue Operations 101



Repeat



Measure

Act

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

1

The Purpose & Foundation of RevOps

- Understand the importance of the RevOps and what it unlocks for businesses

2

Operationalizing Metrics

- The importance of shifting from siloed goals to holistic, actionable Key Performance Indicators

3

Leveraging Technology & Automation

- Addressing how tech sprawl and a lack of one central source of truth kills efficiency

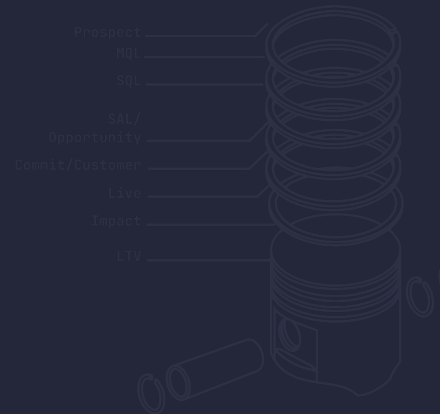
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The Impact of RevOps on Growth

- Introducing the RevOps flywheel to ensure your process is predictable, efficient, and scalable.



Revenue Operations: The science of sustainable growth





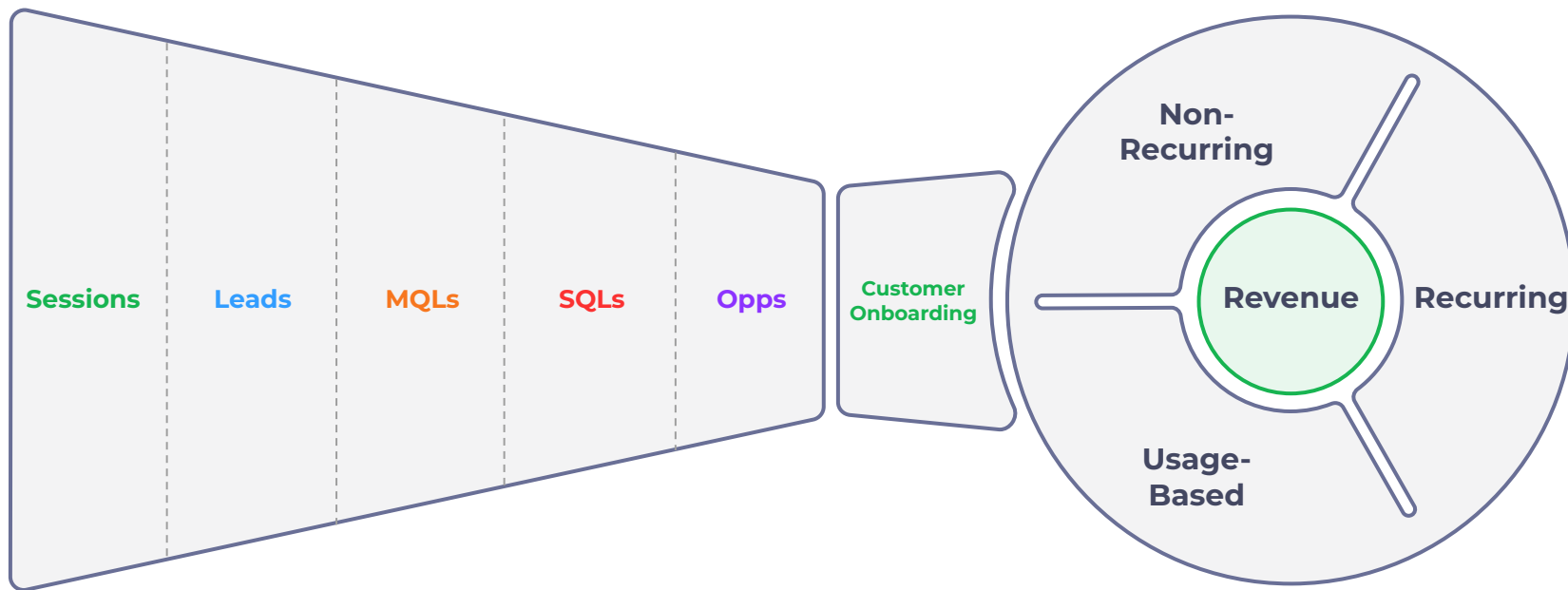
Clean, reliable data

forms the foundation for informed decision-making and accurate forecasting.





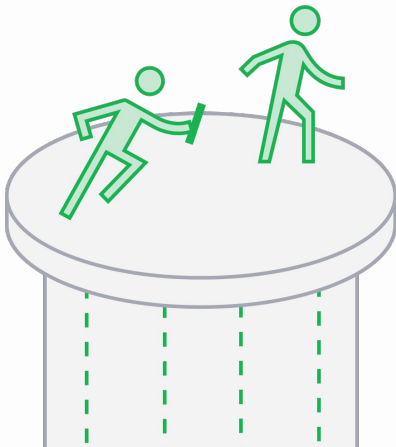
REVENUE PERFORMANCE MODEL™



RevOps: Purpose, Importance, Impact

Strategic alignment

RevOps breaks down the silos between core revenue-generating departments; aligning KPIs, processes, and technology throughout Sales, Marketing, & CS.



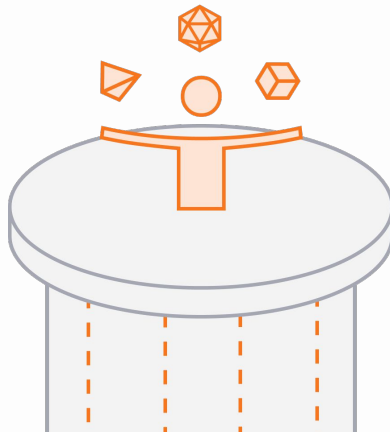
Process optimization

RevOps identifies bottlenecks, locates potential efficiencies, and standardizes processes between departments to eliminate friction and gaps.



Data centralization

RevOps ensures there is a single source of truth for all customer and revenue data, aligning metrics definitions throughout the business to create consistency in reporting.



The pain of **not** having RevOps



Inaccurate Forecasting

If your data is messy and different teams are reporting different numbers, your leadership team cannot accurately predict future revenue, leading to poor resource allocation.



Poor Customer Experience

A siloed approach means the customer experiences jarring handoffs. RevOps smooths this handoff to create a seamless, pleasant experience that encourages retention.

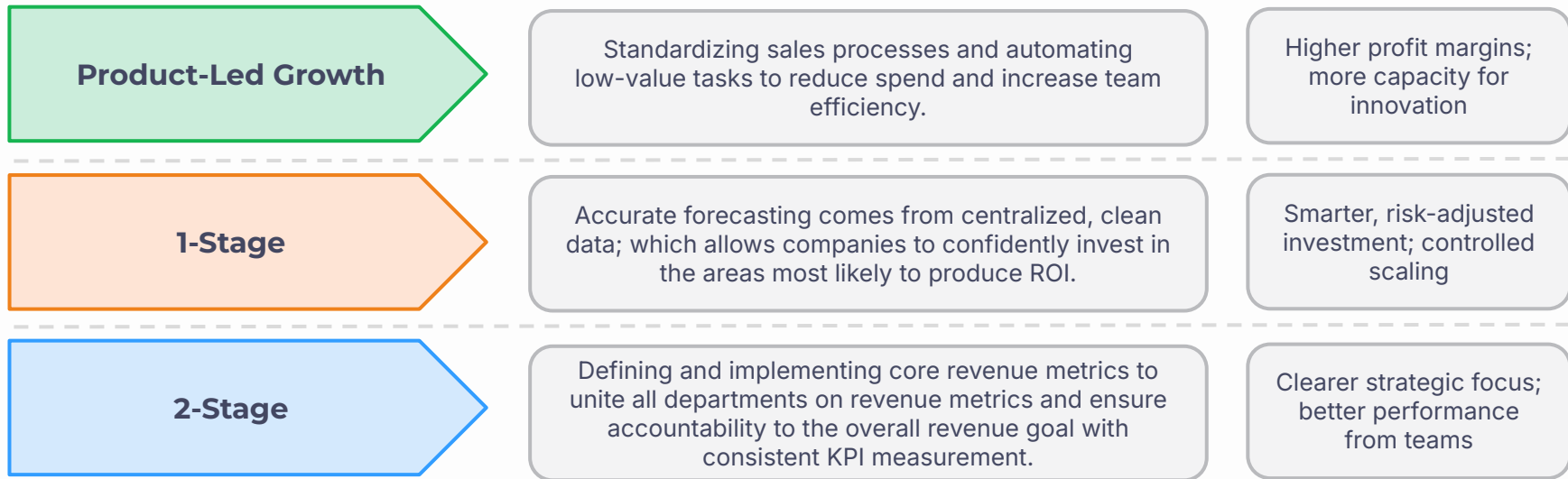


Wasted Spending

Without a centralized operations function, companies overspend on redundant or underutilized technology.

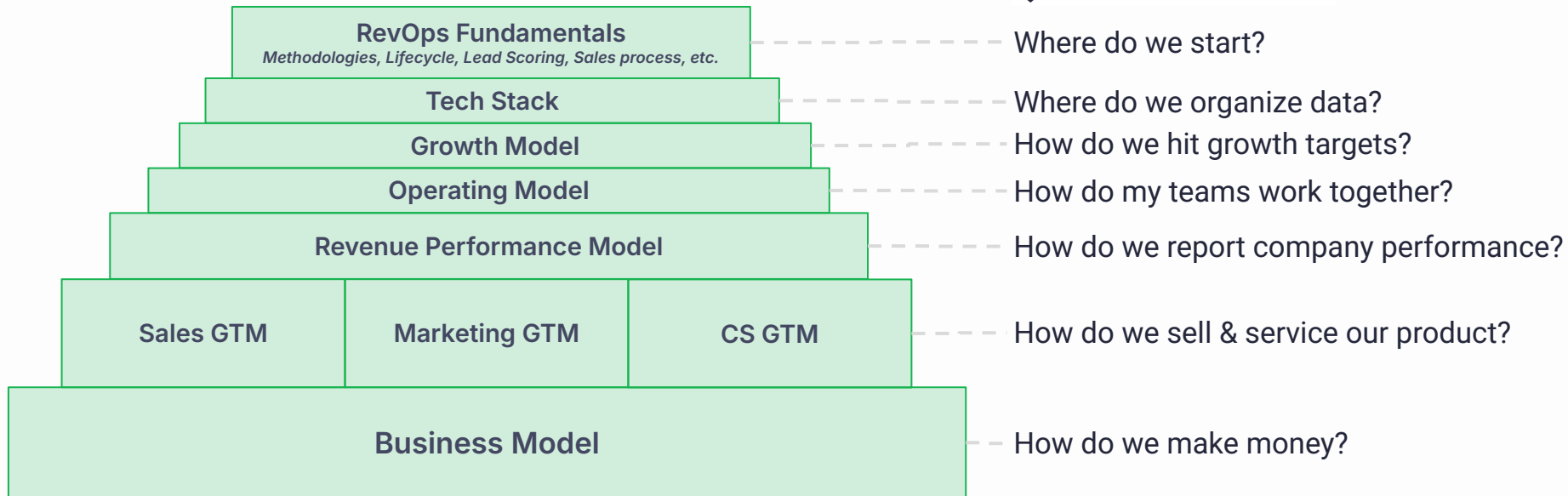


How does RevOps impact **sustainable growth**?



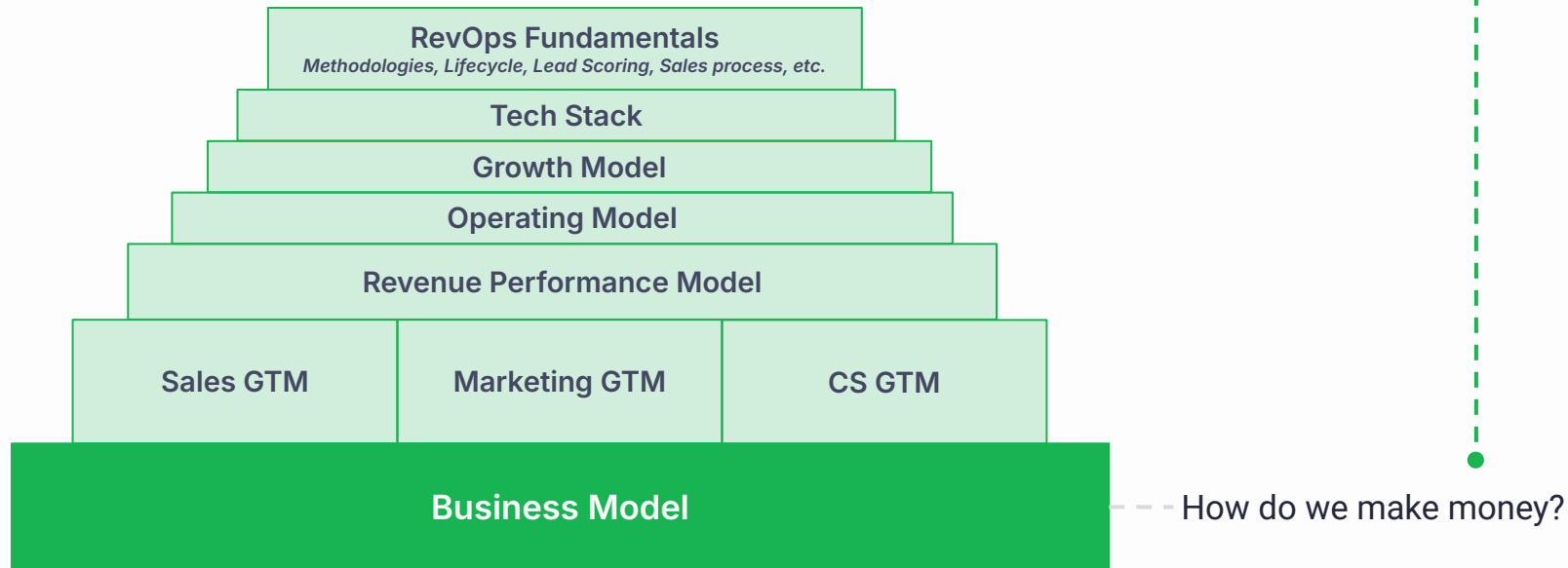
Building Blocks of RevOps

Revenue Engine Framework



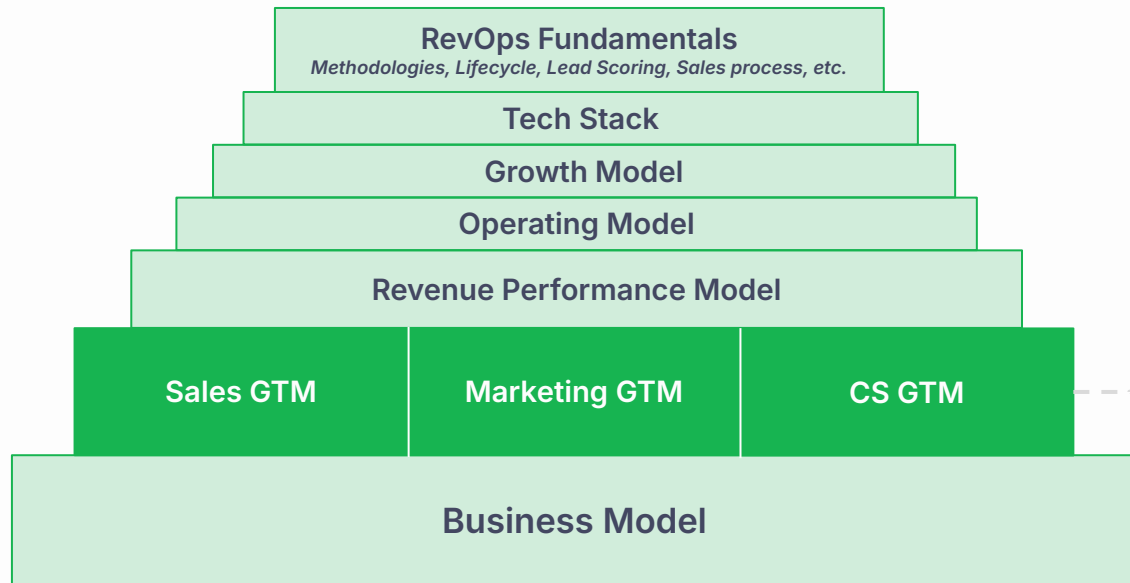
The Business Model

Revenue Engine Framework



Go-to-Market Motions

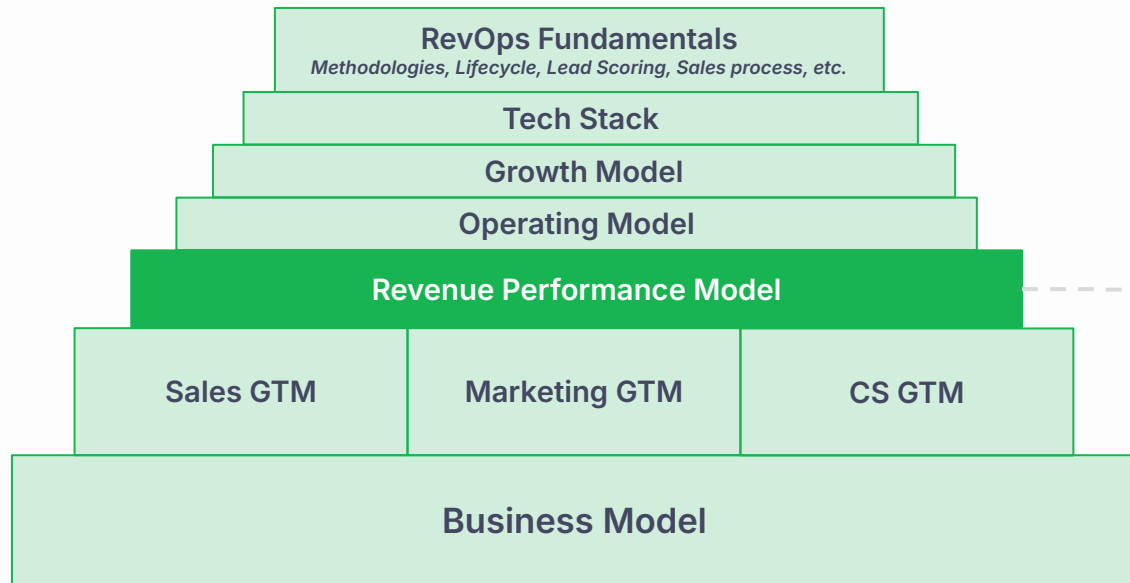
Revenue Engine Framework



How do we sell & service our product?

The Data Model

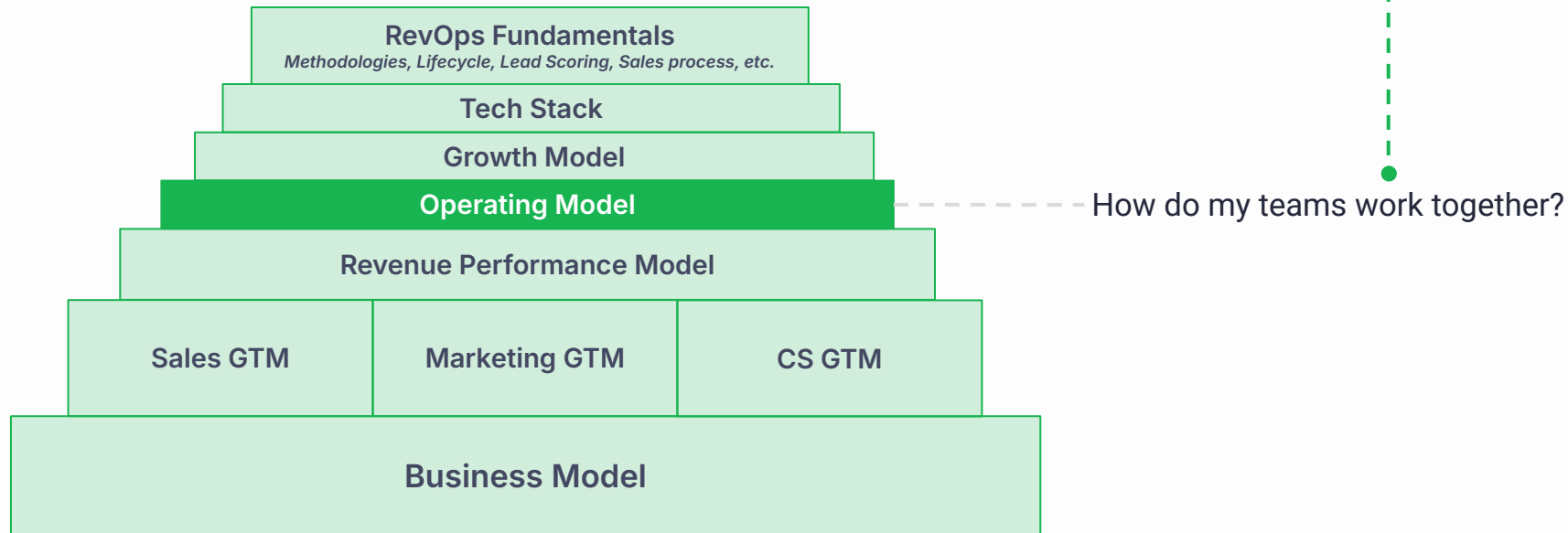
Revenue Engine Framework



How do we report company performance?

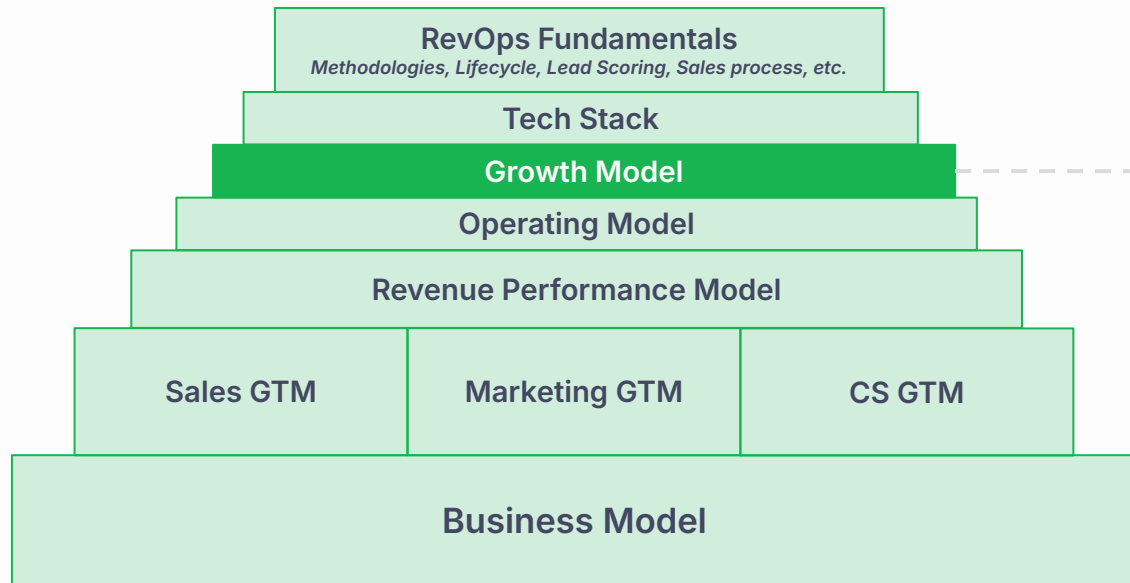
The Operating Model

Revenue Engine Framework



The Growth Model

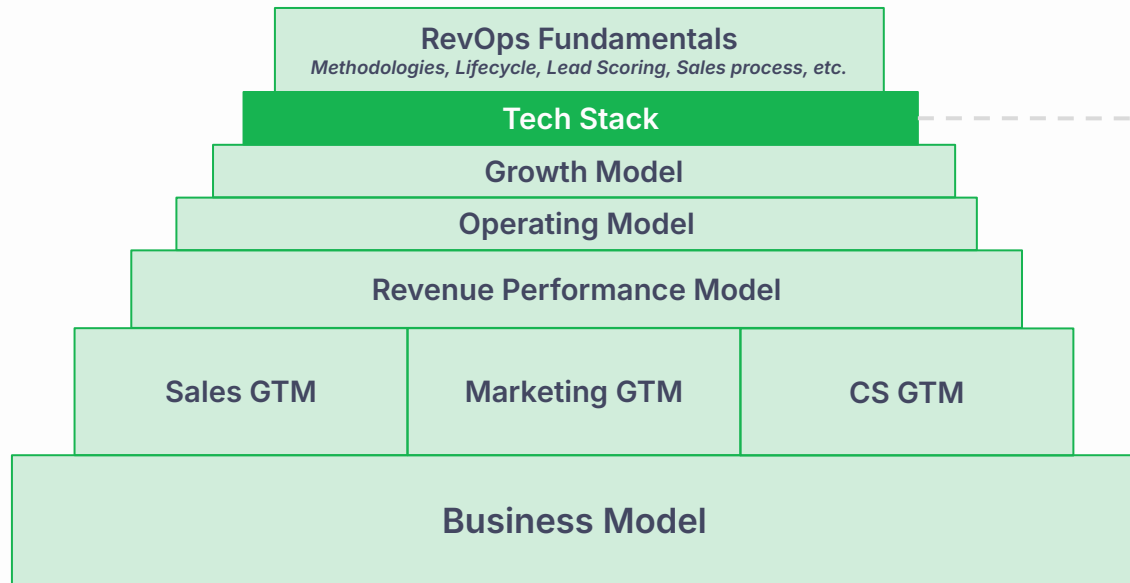
Revenue Engine Framework



How do we hit growth targets?

The Tech Stack

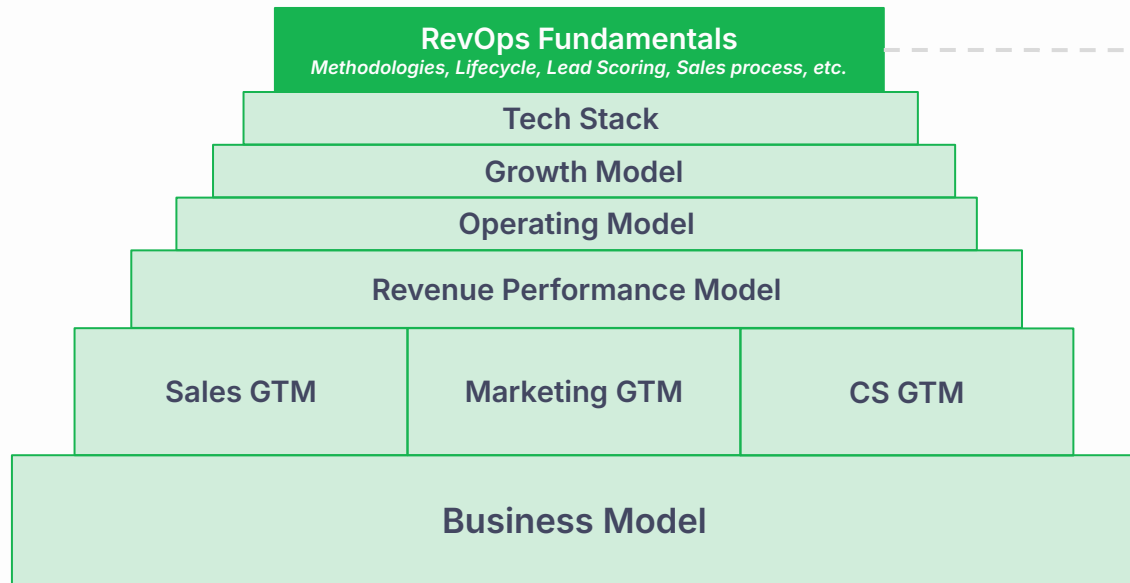
Revenue Engine Framework



Where do we organize data?

Implementing RevOps Fundamentals

Revenue Engine Framework

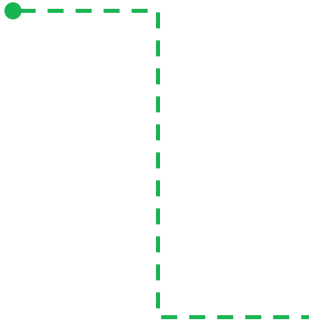


Where do we start?



Revenue Operations is the foundational framework
to achieve **a fully predictable, data driven
revenue engine.**

If you skip any of the building blocks, the engine
will misfire.



A RevOps **team** will...



A strong Revenue Operations foundation begins with a **solid, well-planned implementation**.

Remember, this is a strategic journey — **a long-term solution** — not a quick fix.

Cross-Department Alignment

Current State Audit

Standardized KPIs

Data Quality

Optimization

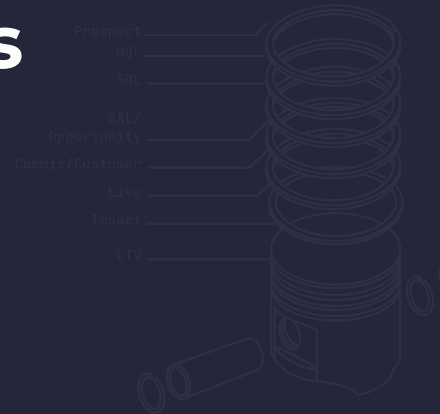
Knowledge Check

1. What is the primary strategic purpose of RevOps?
2. In your own words, why is clean, reliable data the “foundation” for the entire revenue operation?
3. Which of the following is NOT a core responsibility of RevOps?



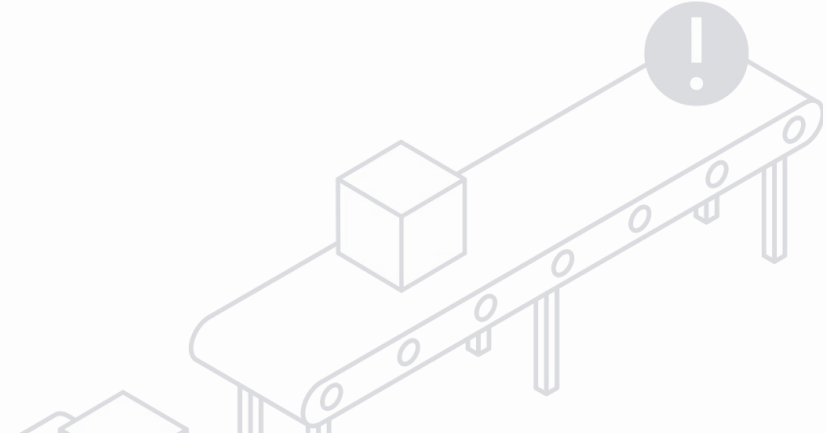


Revenue Operations shifts focus from siloed metrics to holistic KPIs





The Problem



Siloed reporting **creates muddy data**

Every metric should clearly ladder up to overall revenue goals and every department should be able to confidently report on aligned priority metrics.

Siloed

Sales — measures individual quota attainment

Marketing — measures departmental cost per lead

No clear correlation to hard revenue data.

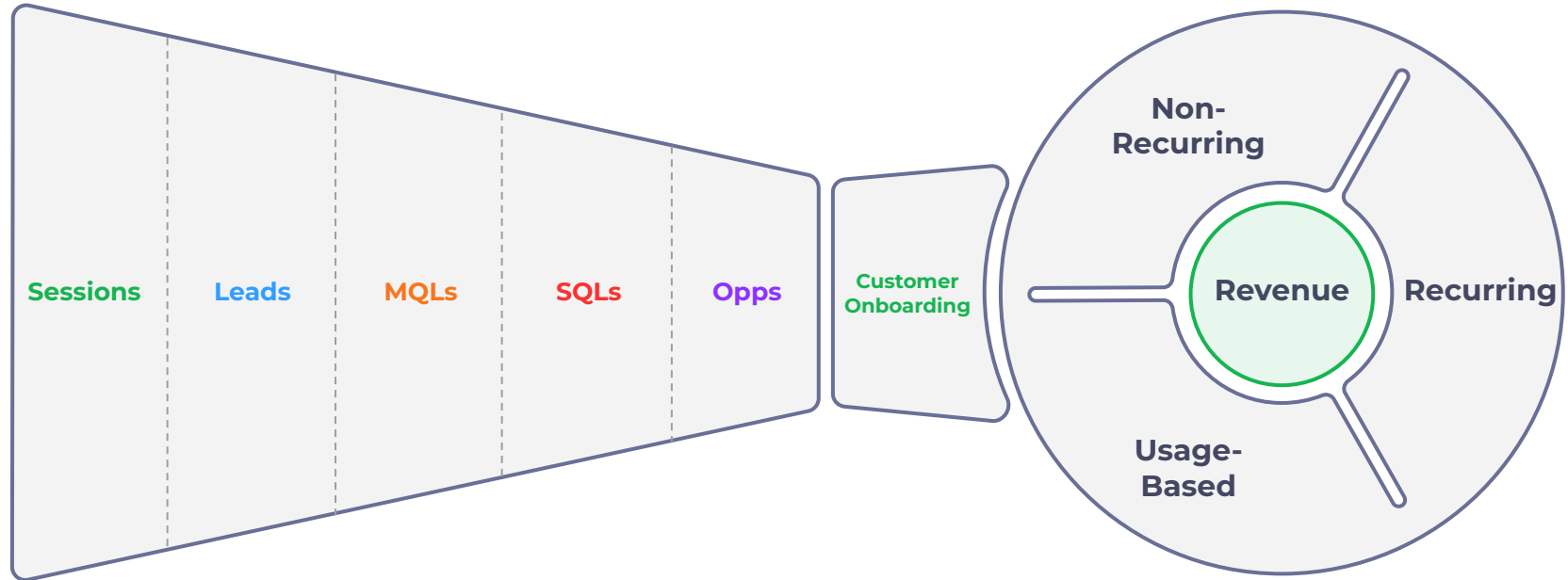
Holistic

Sales & marketing share clear, precise definitions for both acquisition and conversion metrics.

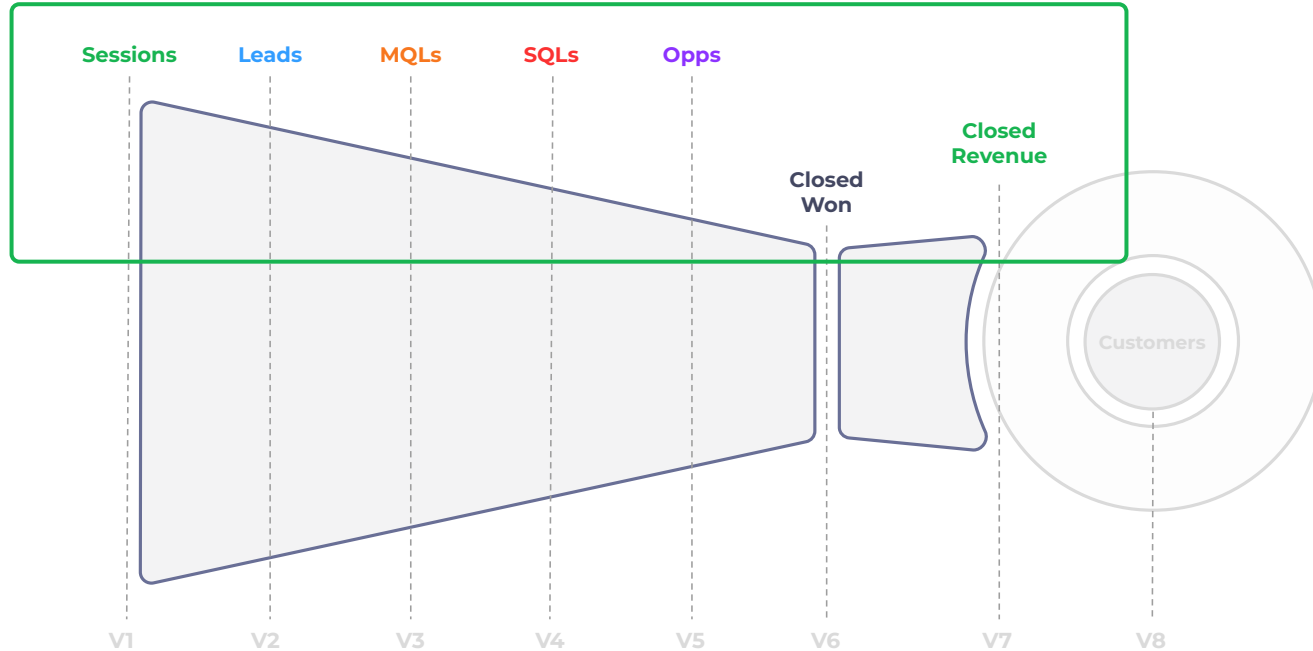
All departments track toward the same goals; all metrics clearly associate to revenue.



REVENUE PERFORMANCE MODEL™



RPM Milestones



Milestones

Key lifecycle stages
of customer journey

Milestone Definitions

V1 - Sessions

of sessions in a given period

Analytics Data

V2- Leads

of leads generated in a given period.

Contact Object

V3 - MQLs

of marketing qualified leads generated in a given period

Contact Object

V4 - SQLs

of sales qualified or accepted leads or product/partner qualified leads generated in a given period.

Deal Object

V5- Opportunities

of open/active opportunities generated in a given period

Deal Object

V6 - Closed Won

of closed won deals generated in a given period

Revenue Data

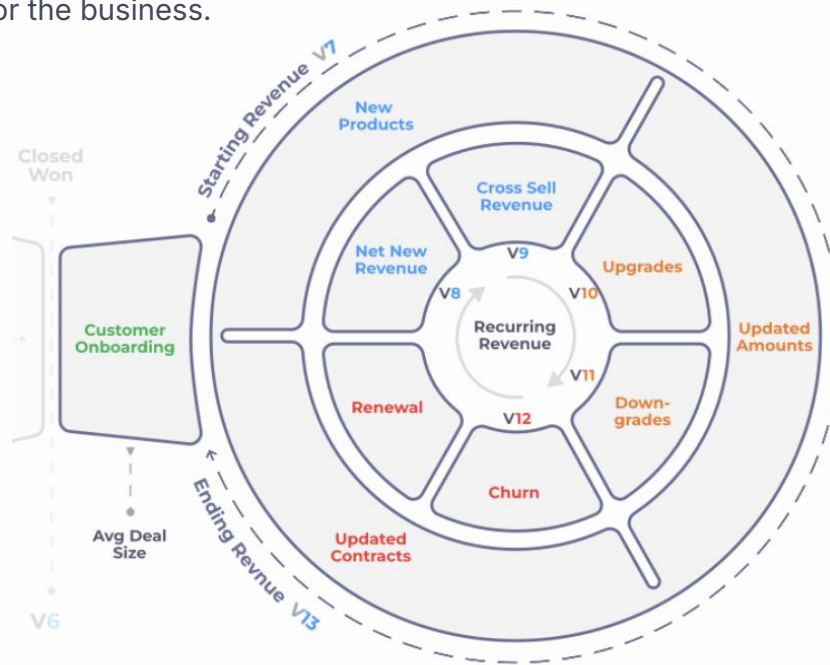
North Star Metric

A **North Star Metric** is the **single key metric that best captures the core value your product delivers to customers** and drives long-term growth for the business.

Net Revenue Retention (NRR):

Shows how much revenue a company keeps and grows from its existing customers over time, including upgrades, downgrades, and cancellations.

A number over 100% means the company is growing revenue from its current customer base even as current customers leave.



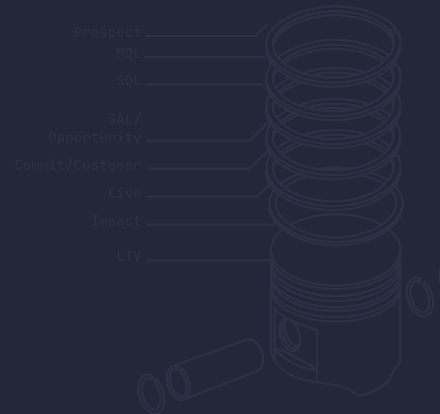
Knowledge Check

1. **What are the holistic metrics your team measures right now?**
 - a. Do all teams have the same metrics?
2. **How is your data modeled and stored currently?**
3. **For more in-depth instruction on using the Revenue Performance Model for your data, check out our Revenue Performance Modeling certification.**



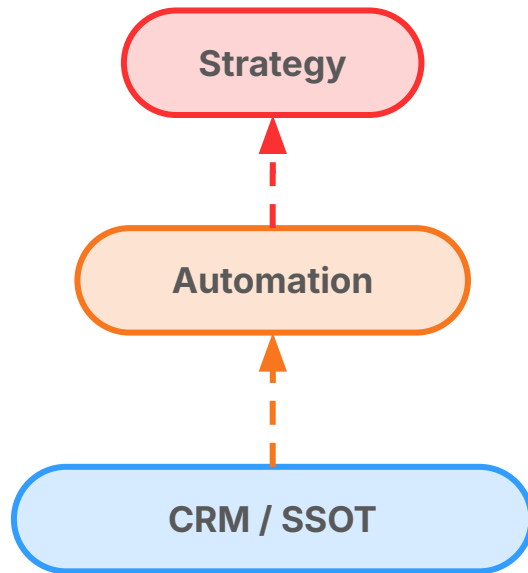


Implementing RevOps with your tech stack and automation

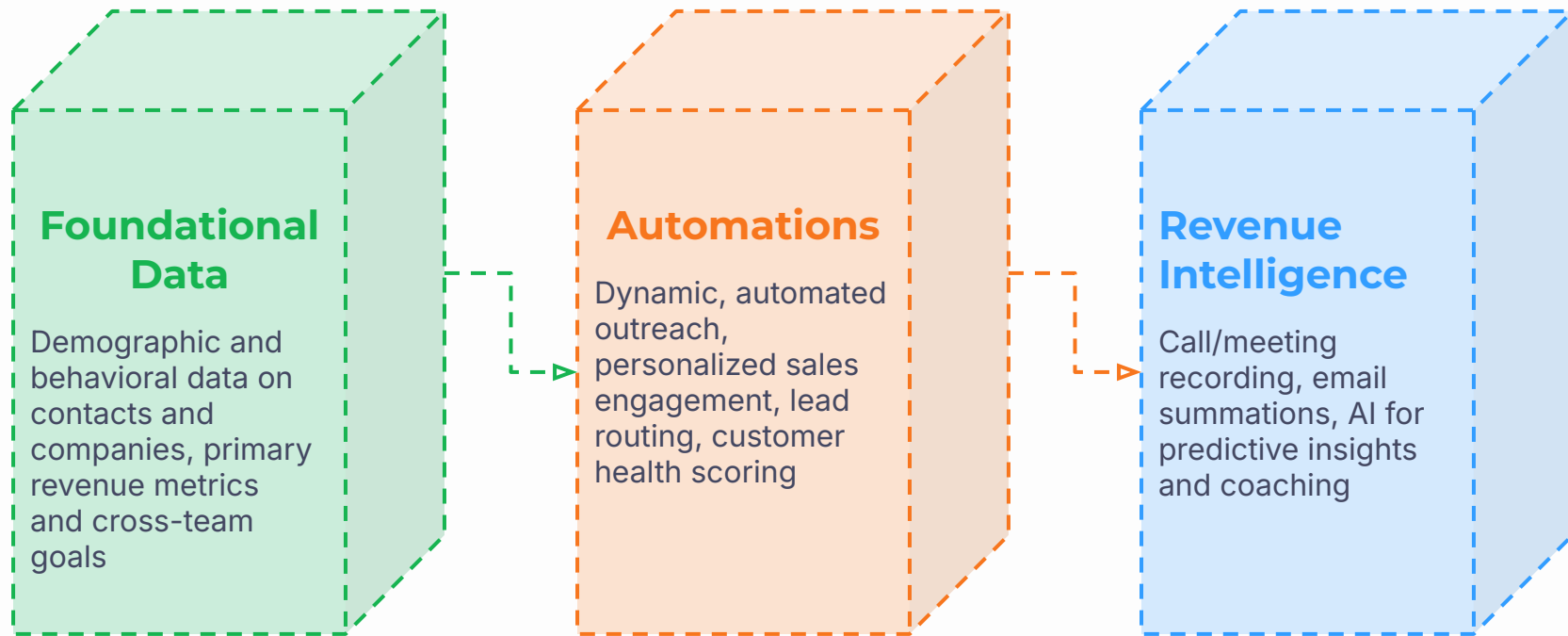


The integrated **RevTech** stack

Data silos, manual inefficiencies, redundancies, and disconnected systems destroy efficacy and clarity.



All systems & processes **should complement**



Automation **can eliminate friction** ... or muddy the waters and cause redundancies in data and confusion throughout teams.

Automating lead **routing & qualification**

When it works

When you have clearly defined lead assignments based on territory, size, etc.

When your qualification criteria is clear, comprehensive, and quantifiable

When you have defined handoff and ownership at each step

When it doesn't

If lead assignment is subjective or ill-defined

If your teams have different, overly complex and subjective, or evolving qualification criteria

Implementing Configure, Price, Quoting (CPQ) Tools

Why it's helpful

- **Automating quotes and contracting ensures:**
 - Price accuracy
 - Consistent discounting
 - Oversight and approval
 - Faster quote creation

When it's helpful

Your product catalog is defined and established

Your product catalog and/or pricing straightforward

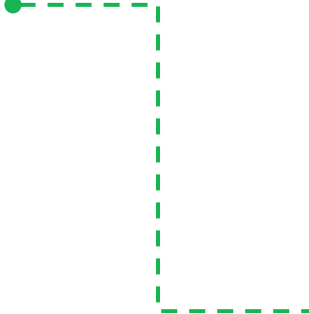
You need additional or more complex approval processes

You need comparative pricing and clearly defined line items in contracts



Data hygiene is **imperative for clarity** in reporting.

Data enrichment can help clean and fill in data for more robust insights into your database.



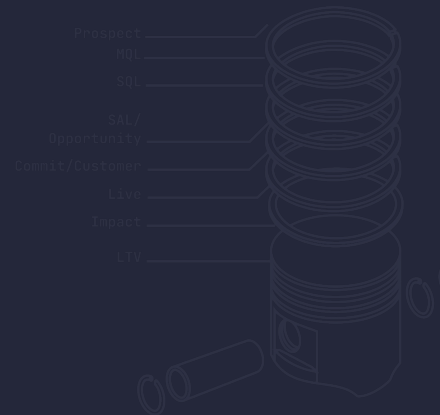
Knowledge Check

1. In the RevTech stack, what is the “central nervous system”?
2. In your own words, describe the problem caused by disconnected systems and “tech sprawl”.
3. When is the best time to implement automated lead qualification? (Choose all that apply.)





Impact of RevOps on revenue performance and growth



Impact on **Growth**



Predictability

- Reliable data
- Standardized metrics
- Aligned processes
- Accurate forecasting

Efficiency

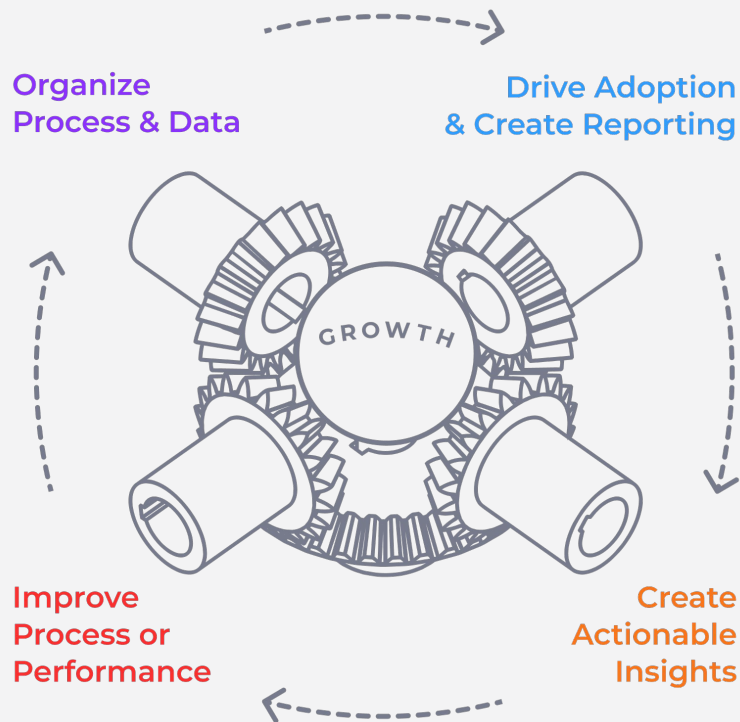
- Identifies bottlenecks and friction
- Establishes automation to remove manual waste and redundancies
- Higher profit margins

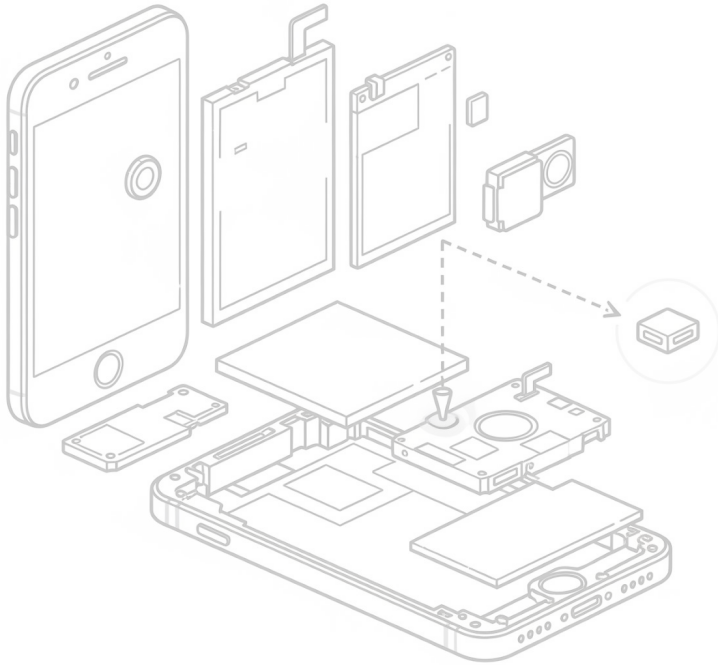
Scalability

- Seamless touch points through revenue journey
- Higher customer satisfaction
- Reduced churn
- Increased expansion opportunities

Why Revenue Operations?

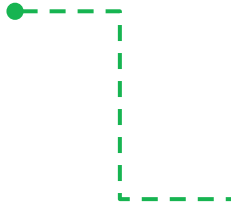
It unlocks the growth flywheel.



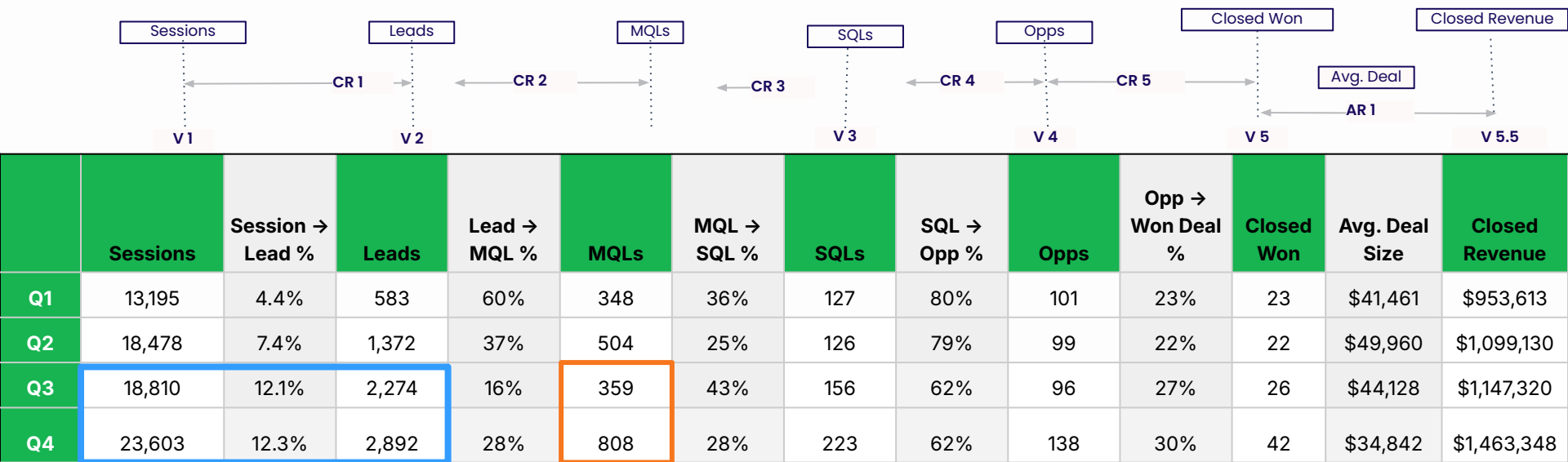


The flywheel begins with organizing your process and data to create a uniform operating environment.

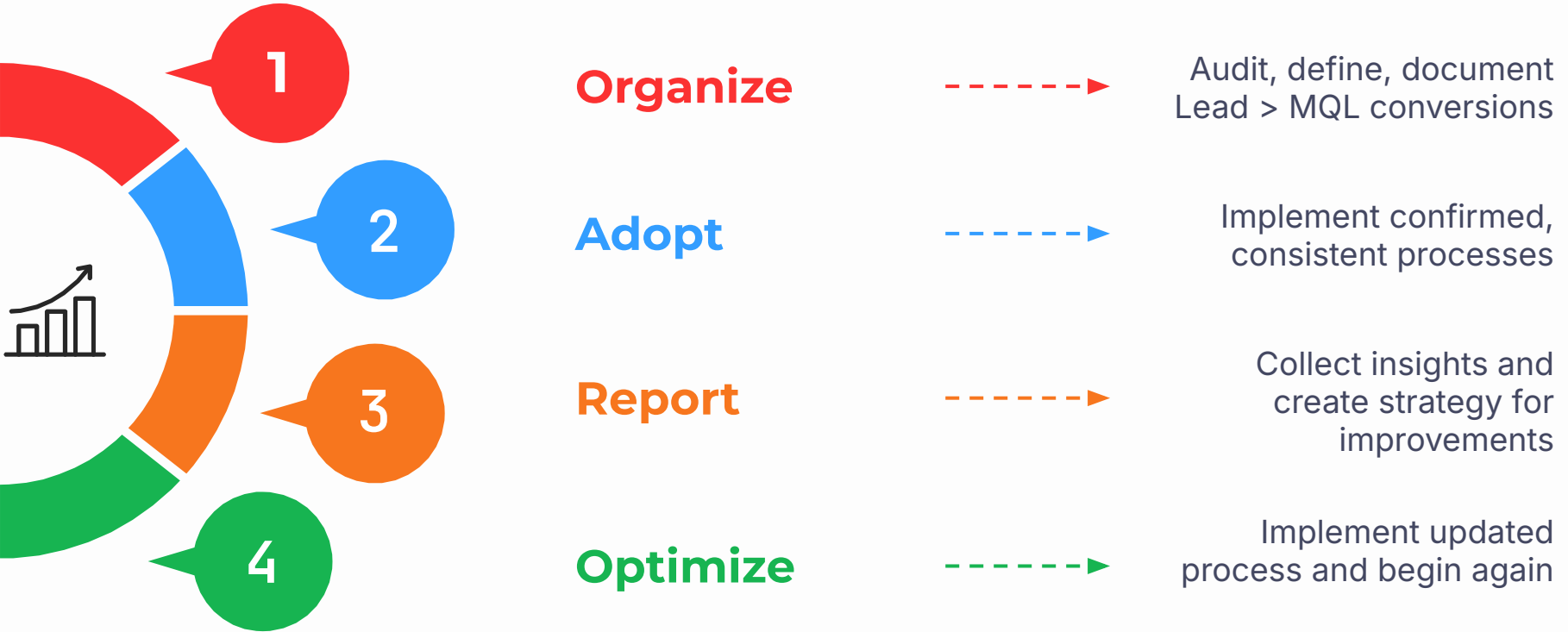
Standardize Rules >
Clear Customer Journey >
Data Governance



Creating Actionable **Insights**

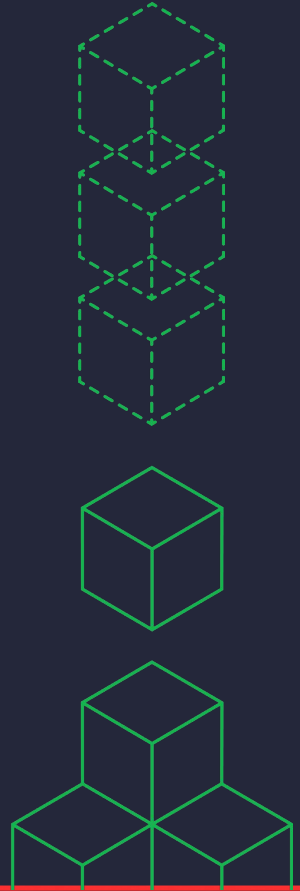


Insight-based **optimization**



Knowledge Check

1. What are the four stages of the RevOps flywheel?
2. What is the primary goal of Stage 2: Driving Adoption & Generating Reports?
3. Look back at the data chart. What is one key insight you recognize and what would your recommendation be?



End of Class 1

