

How to Drive Growth with RevOps

Deals are dying. Campaigns aren't converting. Forecasts are off.

Sound familiar?

With the pace and complexity of today's B2B sales cycles, alignment is key. If your team is not seeing desired results, you could be missing a crucial piece of the revenue puzzle. Enter Revenue Operations (RevOps).

“Revenue Operations helps you focus on the few things that matter,”

- Erin Bush, Winning By Design

At its core, RevOps has two key goals. First, to drive cross-functional collaboration across sales, marketing, and customer success stakeholders. And second, to optimize operations throughout the customer journey, including implementing processes and leveraging technology and data changes to predict growth and maximize revenue.

One week, RevOps may focus on identifying a faster path to quoting deals. The following week, the emphasis may be on deal progression for a specific ICP. However, even more valuable than these evolving initiatives, is RevOps' role as an unbiased advisor. This team is uniquely positioned to take a holistic view of company operations and objectively evaluate which levers to pull to affect change positively.

Using RevOps to gain a competitive advantage

Many organizations begin their RevOps journey with the technology stack. This means assessing what is already deployed in a company and driving additional purchasing decisions to connect the tools, reduce license costs, eliminate manual and administrative tasks, and increase selling time.

But RevOps' power extends well beyond technology improvements. These teams genuinely shine when it comes to insights—delivering deep pipeline visibility and customer journey data that improve win rates.

Let's face it. Customers are more sophisticated and knowledgeable about their options than ever before. While a few years ago, buying groups were small, today, B2B organizations often operate with a dozen or more purchasing decision-makers. Not to mention the advancement of product-led and community-driven growth, which provide buyers even more opportunities to research solutions without involving vendors.

This evolution has placed a tremendous burden on sellers to truly understand their customers through every step in the journey — a load only RevOps can lift.

The more RevOps can arm their team with data and insights, the more significant the competitive advantage. Win rates and funnel coverage are no longer enough. It's all about a single, trusted customer view, enriched with deep data — firmographic, technographic, activity, account-based, and more.

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Eliminate silos; Ensure cross-functional alignment

Mark Rosenthal of HqO described RevOps best as the “connective tissue between teams.”

When executed effectively, centrally aligning data and reporting gives sales a treasure chest of insight; clear visibility into how a prospect became a lead; the most engaging content; and the unique challenges and pain points they face.

This same approach also eases the handoff from Sales to Customer Success, seamlessly sharing KPIs and contextual information to ensure implementation and onboarding start off on the right foot.

“RevOps bridges the gap and acts as an unbiased liaison to enable solutions.”

- Ella Pebbles, Cutover

Prepare for scale

The RevOps mindset is all about peak performance. Practitioners actively look for opportunities to improve efficiency and effectiveness to operate at the highest levels.

“Ultimately, RevOps helps teams win more.”

- Mark Rosenthal, HqO

The cornerstone of this approach is data. When leveraged strategically, RevOps takes the lead in connecting the data across marketing, sales, and customer success. They help the team understand which customers to target, how campaigns are performing, and the customer journey stages.

These insights are crucial for hyper-growth companies. Momentum can be fleeting. You want your sales team prepared for the opportunities coming their way and focused on the right deals.

- Can your Sales team identify which deals are likely to succeed?
- Do they understand which activities advance deals?
- Can they proactively spot risk?

- Are they forecasting accurately?
- Are they involving the right personas?
- Is there a specific stage where deals are lost?

The RevOps team is in the driver's seat, helping sales answer these critical questions. With the proper focus, RevOps can ensure the company is investing time and resources where it matters.

Act with intention, backed by data

Everyone wants to be data-driven. But RevOps can make that a reality, positively shifting company culture and decision-making.

Teams go from simply collecting data to acting on it. Quickly. This transformation pays dividends and can lead to faster sales cycles and more wins.

“With RevOps, everyone knows where they live in the whole structure. And more often than not, there's less finger-pointing because you have data to back up everything.” – Ella Pebbles, Cutover

The elimination of data silos (lead data vs. opportunity data vs. account data) often results in additional benefits, enabling the team to become more customer-focused. This is a massive win. When the entire team understands the customer's needs, satisfaction skyrockets. This can be seen in referrals and on the balance sheet through decreases in churn and increases in upsell/cross-sell opportunities.

Applying RevOps best practices in your organization

RevOps looks different for every company. However, there are foundational principles and best practices that every team should consider.

Understand what makes the biggest impact

RevOps teams must fully understand the complete sales cycle, including the role of every person on revenue-generating teams. This wide-angled view puts RevOps in an ideal position to make changes that improve business health and support cross-functional objectives such as automations that streamline administrative or repetitive tasks; improving data quality; or implementing predictive models to drive the revenue forecast rollup process.

RevOps should also be future-oriented, thinking multiple steps ahead to understand how each decision will impact the business today and in the months and years ahead. The last thing you want to do is implement a process or tool that cannot scale with the business.

Own the data and dashboards

Disparate data and dashboards can be the downfall of revenue teams. With RevOps owning the dashboards, you can align all teams on goals, progression, and contributions. There is no shortage of data to share; however, when that information is spread among different tools, departments, and resources, unnecessary friction can arise, and analyzing that data can be overwhelming.

“[It’s important to look] at systems and data and process — all three have to be aligned in all different departments,”

- Erin Bush, Winning By Design

When it comes to dashboards, one size does not fit all. Focus on making the information as relevant as possible for the task and role. For example, you may want:

- A Win/Loss dashboard to review what works
- A 1:1 dashboard for managers and reps to review their business each week
- A Renewals Health dashboard to understand churn
- An Executive Weekly Dashboard that leadership can spot-check each week

Your revenue team has questions. With connected data and flexible platforms, you can analyze and present data based on the content types and calculations needed, to deliver answers, quickly.

Use data to manage teams

Once you have the data, it's all about pulling the actionable insights that will help your teams improve.

For example, if you're trying to improve marketing efficiency, it helps to know which campaigns are performing the best. If you want to drive better performance from your SDRs and AEs, you'll want to consider how many contacts they engaged in the past week. And if you are looking to improve pipeline velocity, you'll want to understand which deals are stalled, the number of days in each stage, upcoming meeting dates, and more. Armed with these data points, Sales managers can coach their teams and ensure they are spending time on the right deals.

Fast-growing HqO, a tenant experience technology leader, closely tracks activity across the team as a key indicator of deal success, along with:

- Forecast predictions: To project revenue and track progression towards goals
- Close rates: To assess conversion from pipeline to sale
- Open pipeline: To assess available opportunities and inform the forecast
- Sales cycle length: To aid in the forecast and measure efficiency

RevOps should not only produce these metrics, but also identify gaps and opportunities based on the data.

“People who invest early and often are seeing the benefits. It helps you get ahead of risks,”

- Greg Sundermann, Replicated

Building the most impactful RevOps team

As you build your RevOps team, there are a few steps you can take to facilitate the process:

- Start when the first ARR stream comes in.
- Find the doer: Your first hire needs to be someone great at getting things done, as they tend to be great problem solvers.
- Keep it clean: Remember that RevOps works best as an unbiased function, not a subset of stakeholders.
- Take time to look at the details: “Look at what is actually happening in the day-to-day of your teams. Focus on real-life examples, not hypotheticals,” says Bush.

Looking ahead to the future of RevOps

ABOUT INSIGHTSQUARED

InsightSquared empowers revenue professionals to make better decisions by equipping them with actionable, real-time intelligence that drives predictable growth. B2B organizations worldwide rely on the company's revenue intelligence platform to build stronger, healthier pipelines, improve conversion rates, target rep coaching, boost forecast accuracy and significantly increase competitive win rates. For more information, visit www.insightsquared.com.

The future isn't just with RevOps, it's in RevOps.

Digital is here to stay: marketing automation, intent signals, virtual meetings, product research, chatbots and more. Understanding how buyers and sellers engage across the array of digital channels is critical to improving the customer experience.

Companies that invest in RevOps — in the people that run the programs and the technology that drives efficiencies — will be the leaders who rise above in the coming years. These operational and cultural changes are not only a commitment to the business, but a commitment to customers and to your team.

“There's a greater understanding of the value that RevOps brings to the operation. RevOps helps to understand growth so everyone can be more informed when setting their strategy. RevOps is my most important business partner.”

- Mark Rosenthal, HqO

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