

RevOps Revolution:

# HOW REVENUE OPERATIONS CAN TRANSFORM YOUR BUSINESS



## As a leader at a growing SaaS company, you've done the work to achieve product market fit and you're ready to start building out your team.

Because of your hard work, your customer base is expanding, and brand recognition is increasing week over week. But when you are asked to report on or replicate your success, do you have an answer ready to go? Or, are you like many leaders of growing companies who don't know where to start and are unsure what does – or doesn't – work when it comes to improving customer experience?

One of your major struggles is accurately tracking the customer journey (and experience) across departments. When most departments work in silos your data only tells half the story.

[According to Clari](#), 32% of customers will stop doing business with you after a single negative experience. As you increase the channels through which you do business, the chances of an inconvenient customer experience increase as well.

To address this, remain competitive, and sustain growth over time, you know that you need a revenue operations (RevOps) function.

RevOps is crucial to the success of modern businesses, especially in a time when all teams are being asked to do more with less available resources. RevOps teams help unify and align departments across the business to optimize revenue generation and accelerate growth from the moment a prospect first engages with your brand until they offboard.

As a startup, you might not have the budget to hire a full-time Head of RevOps, but you know it's important to start early. So how can you start building out the function with the resources you have available? We'll show you the road map.

01.

# DO YOU NEED A REVOPS FUNCTION?

For competitive businesses, a RevOps function isn't merely a "nice to have." Without a RevOps function, cross-functional alignment is nearly impossible and the customer experience – which is integral to success – will suffer.

With RevOps, you can achieve better organizational alignment, efficient revenue measurements, a supportive tech stack, increased growth, and better customer retention. [According to Gartner](#), by 2025, "75% of the highest growth companies in the world will deploy a RevOps model."

Moreover, a lack of RevOps often means companies "struggle with poor strategic alignment, lack of process efficiencies to identify revenue opportunities, and most importantly, tools that didn't scale as their teams grew in size," according to a [Forrester study \(commissioned by Chargebee\)](#).

[Forrester also says](#) that companies with RevOps functions grow three times faster than those without. And, according to [Revenue.io](#), "21% of companies saw increases in alignment and productivity across GTM teams after hiring a RevOps function."

To stay competitive and maximize revenue potential, the data is clear – you need a RevOps function.

## When Do You Need RevOps?

The answer is sooner rather than later. Many companies think that below a certain annual recurring revenue (ARR) threshold or employee headcount, they can get away without

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Lead Solutions Engineer at  
Salesforce

having RevOps. However, if you don't invest early, you're likely to have bad data hygiene, inconsistent processes, and departments that aren't well aligned.

Briana Yarborough, Co-Founder of CModel agrees. “Starting early allows you to set up the infrastructure properly from the beginning and you can establish clean, and consistent data architecture that will be integral for informing business decisions that will support an accelerated path to a sustainable, predictable and profitable business.”

Likewise, Allyson Clark, Lead Solutions Engineer at Salesforce, believes that when it comes to getting a RevOps function, “The earlier the better. As soon as you have a sales team, you should have a RevOps person helping that salesperson. If you don't invest in RevOps resources, the rest of the team will have to do the RevOps person's work.”

Getting started early can help you iron out process efficiencies when the risk profile is lower. Because, as Ryan Milligan, Sr. Director of Revenue Operations at Quotapath says, “If you build the process wrong with three reps, it's going to be very painful when you have 30 reps and then 300.”

As an innovative leader of a SaaS business, you understand the importance and overall efficacy of a RevOps roadmap in your company. But without professional insight, chances are you are doing something wrong.



# 02. COMMON MISTAKES WHEN GETTING STARTED WITH REVOPS

Even companies that understand the importance of RevOps often try to piece together the function, adopting existing technology and processes in the hopes that it will give them the advantages a RevOps function promises.

Here are some common mistakes teams make when trying to get started with RevOps.

## **Conflating Sales Ops and RevOps**

Contrary to popular opinion, RevOps and Sales Ops are two different functions. Whereas Sales Ops focuses on deal optimization, RevOps thinks about the entire revenue generation process. Also, Sales Ops tends to fit under the umbrella of RevOps, alongside Marketing, Customer Success, and Finance.

Milligan agrees. “The major thing I see orgs doing wrong is just rebranding sales ops as RevOps and having RevOps only do sales work. RevOps is about the full customer journey — from first demo to 10th renewal. RevOps should have a wide enough aperture to look at the entire go-to-market process, not just focus on improving the efficiency of the sales team.”

RevOps as a function tends to be wider in scope than Sales Ops. Organizations that confuse the two are often unable to scale the function and achieve true cross-functional alignment. They will be more concerned with individual deals rather than the bigger picture of revenue performance across the company.

## Limited Expectations for RevOps

Too often, expectations around RevOps are limited in scope, and as mentioned above, confined to concerns around the deal. As a result, the deal becomes the primary focus of all strategic initiatives.

“Expectations around RevOps are typically limited to systems administration, leaving some RevOps professionals as simply order-takers that aren’t quite capable of identifying or solving strategic insights,” says Yarborough. “True value comes from that strategic partnership, a seat at the table, and RevOps as an executive function.”

## Siloing RevOps in a Single Department

The value of RevOps comes from cross-functional collaboration and [data alignment across departments](#). Situating RevOps in a single department (e.g. Sales or Finance) exacerbates the problem because it gives limited view to the types of data available. Focusing on one over the other prevents a holistic view and approach to revenue operations and optimization.

This encourages the thought that the work is done once the customer has been acquired, rather than looking at the customer journey from first to last touch.

## Outdated tech stack

In the age of subscription-based services, Enterprise Resource Planning (ERP) tools aren’t dynamic enough for the needs of modern businesses. Most revenue management technology is outdated and cannot keep up with the multi-channel approach of most SaaS businesses. This leads to gaps in visibility, basing decisions off feelings, and lacking true benchmark data.

For growing companies, common tools include Google Docs, a tool for whiteboard process flows, and a customer relationship management (CRM) system to capture data insights from the various tools used by each department.

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Sr. Director of Revenue  
Operations at Quotapath

## Underinvesting in RevOps

For growing companies, it can be hard to justify the cost of RevOps. Some companies fall into the trap of knowing that they need a RevOps function, but don't want to invest in it. As a result, there is often not a dedicated person, and the people who are tasked with the job have to make do with meager resources.

Clark says, underinvesting is one of the biggest problems companies face when trying to implement or leverage RevOps. "They want to make one person do the job of ten or they don't want to invest in experienced talent. They want to bring in people and expect them to learn [revops] on the fly and do it right, underinvesting in both the talent and the number of people needed to do it properly."

So, if you're going to make the leap, give your team the best chance of success by investing in the talent and the tools needed.

Understanding the common pitfalls of starting a RevOps function from scratch can help you avoid those mistakes and start to build out an effective RevOps roadmap.



## 03.

# REVOPS ROADMAP: HOW TO BUILD AND SCALE YOUR REVOPS FUNCTION

A key component of building out RevOps is creating a RevOps roadmap. A RevOps roadmap is a strategic document that keeps your teams aligned, outlines necessary processes, and keeps the function on track for goal attainment. It is a key part of your overall strategy, and integral to helping your company build, grow, and scale your RevOps function.

True alignment and visibility are near impossible to achieve without a dynamic roadmap that's evolved alongside the needs and goals of the company. A roadmap ensures that all your activity – from first touch to offboarding – is in service of your goals.

According to [Ventana Research](#), “80% of organizations limit the effectiveness of revenue growth with an incomplete view of a customer’s lifetime journey from lead, engagement, purchasing, on-boarding, renewal and expansion.” A roadmap helps fill this gap. It considers the full view of the customer’s journey and maps strategic actions to achieve your goals.

As Yarborough says, “The more strategy, process, and alignment put in place for the organization, the clearer the opportunities and gaps become, whether that is new tooling, data capture or headcount.”

## Building out a RevOps Roadmap

There’s no single way to build out a RevOps roadmap. Each company’s roadmap will look different depending on their business model, product offering, and customer/user needs.

For Yarborough, roadmaps are “the shaping of the internal alignment, customer obsession, strategy, process efficiency, tooling, and data to support – ideally in that order.”



The first step in building out a roadmap is documenting the people, processes, and technology that will be involved in the function. This will be a living document that changes over time. Each team will have access to it and be able to make changes when necessary.

Digging into the process a little more, Yarborough suggests starting by evaluating your systems and data integrity while aligning on organizational priorities. From there, she “devise[s] a strategy that will help us reverse engineer the target date of each accomplishment and iron out the roadmap according to the strategic needs of the business. Tech debt, building rapport/trust and metric visibility are typically the most common attributes of what goes into that roadmap.”

For Milligan, understanding financial targets and metrics you want to move “and how you want to move them” are crucial. From there, he says, “you can identify the tools & processes that will enable you to make those movements and prepare plans around how to get those projects done.” He also recommends planning one quarter at a time, especially at smaller companies, as priorities tend to shift over time.

When building your roadmap, it’s important to align on processes and get the proper tech tools needed for the job. Customer data is important to almost everything, and without it, you’re just playing a guessing game.

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# READY FOR A REVOPS REVOLUTION?

As you build out a RevOps function, it's crucial to look at its benefits holistically and not just as an extension of a single department. When given the right resources, RevOps operationalizes data, benchmarks, and tech tools to systematize revenue generation — the key to success in SaaS.

A primary concern of RevOps is learning what actions and behaviors have the greatest impact on revenue. As Clark says, RevOps focuses on “The things that are slowing us down or preventing growth, and solves the problem. RevOps is constantly looking for those roadblocks, and fixes them.” Since the goal is streamlined and predictable revenue generation, RevOps figures out how to make these processes repeatable and creates frameworks to measure their impact.

According to Milligan, “The biggest way RevOps impacts revenue growth is in providing visibility into core metrics of the business. By identifying misses against targets, you can then prioritize actions to improve those metrics and thus be more efficient overall. Also RevOps makes it way easier for people to move through your funnel, and thus leading to increased overall revenue.”

A roadmap is a good place to start, as it will build cross-functional alignment and document goals for easier tracking and measurement.

If you're ready for a RevOps revolution at your company, but can't afford a top hire just yet, check out Carabiner Group's [fractional RevOps services](#).