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Tactical RevOps:

Bringing Revenue Operations to Life in Your Organization

Though Revenue Operations (RevOps) is relatively new, it is the fastest growing function in businesses, with RevOps leaders in high demand across the U.S.

As the economic outlook trends downwards, organizations need people, processes, and functions that will help them to generate predictable revenue at scale. With increased awareness of the long-term benefits of an effective RevOps function, more and more companies are prioritizing RevOps hires and strategies.

So what are the benefits? Broadly, RevOps helps businesses to improve alignment between revenue generating teams, enabling a seamless customer journey and top-notch experience. It also engenders more accurate data and pipeline visibility, and applies these insights to streamline the client lifecycle.

In practice, that means companies with a centralized RevOps function experience up to **30% increase in ARR**, 20% increase in sales productivity, as well as 30% reduction in go-to-market (GTM) expenses. Still, for companies that have never had a RevOps function before, there is a wide rift between understanding the benefits of RevOps and creating a strategy and then actually implementing tactical RevOps.

Getting buy-in from stakeholders, assessing existing systems and making recommendations, and initiating process changes are crucial considerations in bringing RevOps to life in your organization.

We interviewed several revenue leaders from tech companies about how they implemented RevOps into their organization. In this eBook, we share their insights about starting your **RevOps Revolution** on the right foot.

Collecting Consensus: Getting Buy-In from Stakeholders

While some companies might say they have a RevOps strategy, many of them can't pinpoint exactly what that looks like in practice.

General alignment of the revenue teams' goals and metrics is a good start, but RevOps works best when it is seen as a centralized function that aligns and unites the company's entire revenue engine: from first touch to upsell.

No matter how you define it internally, it requires cross-functional collaboration, and therefore stakeholder buy-in. Ensuring that all involved teams, leaders, and executives are on the same page is crucial to effectively implementing RevOps into your organization.

Determining stakeholders

The stakeholders needed will depend on your organizational structure and business goals. Often, stakeholders include executive and senior leadership on the revenue team. Think Chief Revenue Officers, Vice Presidents of Marketing, Directors of Sales, Heads of Customer Success. Finance and Product should also be taken into consideration as their input and work can heavily influence the work done by the RevOps team. Its also not uncommon to see RevOps actually sit under the CFO.

For Ian Lazarus, Director of Revenue Ops and Engagement at Zippy, leadership executives and the entire GTM team are stakeholders for implementing RevOps. Meanwhile, Ben Fuller, VP of Business Systems at Advantive, argues that senior leadership, more so than executive leadership, should be stakeholders in implementing RevOps because "the senior leadership team will be in the weeds, so you need their buy-in when making decisions."

Jeff Ignacio, Head of GTM Operations and Growth at Regrow Ag, splits the difference: "[The stakeholders are the] function or business unit leaders at the top end. Then, when we think through execution, we'll need buy-in from the field [SDRs and AEs] in order to adopt new changes."

Developing messaging

Don't expect people to understand the value of your initiatives off bat. A considered approach to messaging helps you achieve buy-in more effectively.

"Use different language to speak to different audiences," says Ignacio. "For executive audiences, we want to tie everything to ROI and corporate objectives. If we're talking to the field, we're thinking through how it will impact their day-to-day productivity gains and time savings."

Equally important to the message is the medium you use to communicate it. Lazarus suggests that user stories and best practices — especially when made visually appealing — are two of the strongest ways to demonstrate use cases.

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Responding to objections

Fuller argues that when it comes to winning over a challenging stakeholder, there's no one-size-fits-all approach. Instead, "you need to understand where they're coming from if you want to have an impact on them." So, as you try to address (or pre-empt) objections, Fuller says, take their personality and your history with them into account.

For Ignacio, it's about finding common ground and moving from there. "Work towards understanding what the common objective is and if there are competing priorities. Once you understand the business goals of both sides, then we start to look for a common path to working together." And if that doesn't work, he says, "then we need to build a culture where we can listen to one another, and if needed, go into a position where we might dissent but commit. Depending on the resolution, we can either compromise or move forward despite disagreement."

Getting buy-in ensures that implementing tactical RevOps remains a collaborative process and that everyone has the tools they need to make it successful.

Making Recommendations for the Most Impact

Implementing tactical RevOps will require an assessment of existing processes and tools to determine what works, what needs to be optimized, and what needs to go. In a difficult economic climate, you need to ruthlessly prioritize and optimize. A RevOps review can help you determine what truly makes an impact on your business.

Suggesting changes

But before you make broad changes, you need to advocate for your suggested changes with the stakeholders defined above. Having key players on board is crucial to making impactful recommendations. "Stakeholder buy-in is the most important thing and it has to happen first, before you get underlying team buy-in," says Lazarus. "Once you get stakeholder buy-in, find your super users and work through them to buy change."

For Sid Kumar, SVP of RevOps at HubSpot, recommendations are based on two guiding principles: customer experience and rep productivity: "Does it move the needle on either or both of those? Then, we measure impact, effort, and time frame for seeing results." Likewise, Ignacio aligns recommendations with business objectives "and whether or not the trajectory we're on will meet the needs of the business. If we learn that we won't meet the needs of the business, it makes sense to put a bold face on and tell [the business] we won't meet it."

Meanwhile, on the more tactical side, Fuller advises new RevOps teams to "use Salesforce Cases for inbound requests and track based on specified categories, so I can tell if there is an influx of requests based on a certain system or process. This way, we'll know if it's a process or system change that needs to happen."

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Sid Kumar
SVP of RevOps at HubSpot

Putting it into action

Ignacio argues that in times like these, businesses have to adjust quickly. So when you have buy-in and the team is onboard with recommendations, it's time to transition them into action.

According to Lazarus, doing this requires "a combination of brute force and showing what the promised land looks like. It's hard to hypothetically show good RevOps, so you have to go through the brute force exercise to show what it could look like."

Kumar suggests prioritizing changes by GTM priorities. "Rank [your GTM priorities] by impact, effort, and time to return, and from there you have a short list. That's the list I would go work off of with more user stories and align with internal resources or a third party to complement."

Ignacio's approach centers the milestone itself. "First thing, figure out how we accomplish the milestone. There's usually some key metric that measures success. Beyond that, we develop initiatives that help us get to those goals. Then we put those initiatives into action via project plans — i.e. an owner for each initiative, what metric they'll need to accomplish, and what resources they'll need to be successful."

Over time, as you note the responses and pushback to your recommendations and assess which initiatives have the most potential for high impact, you can continue to iterate on and optimize your recommendations and changes over time.

Doing It Differently: Implementing Process Changes

Putting your recommendations into action means making internal process changes. Whatever changes you make, says Ignacio, they must align with the business. "Next, focus on organizational structure, so if we align on business priorities, we'll know if we are setting the group up for success with the right process. Then, reassess your roadmap based on what you've learned from the first two."

You can approach implementing change in one of two ways: building from the ground up or prioritizing quick wins.

Start from the ground up

Kumar thinks about the building blocks of RevOps from a foundational standpoint, asking questions like how are you going to track customer engagements? What are your data definitions? What is your data architecture? "There are also systems that can help you leverage automation. Data is the fuel that you put in the system to drive efficiencies for GTM teams." Though the payoff for this is longer term, Kumar says, you should start planning for those as soon as possible, because "the longer you wait, the more technical debt you'll accrue. Think of your strategy and lay the train tracks for them."

For Fuller, the first thing he and his team would do when implementing tactical RevOps is to completely rip out systems and separate them from the revenue organization. His plan of action would "have RevOps report to BizOps because they are supporting the whole business. That would allow RevOps to be analytical and strategic, leaving system configuration to the people who specialize in it."

Go for the quick win

Lazarus looks for quick wins within the framework of a successful long-term structure. "Understand your business goals and how to build proper reports and dashboards that align and give line of sight to leadership and the whole team. Figure out what's important to the team then build out and support it."

To Kumar, one high impact, reasonably quick — though not necessarily low effort — win is developing a single view of the customer journey. "The alignment that process can drive is so great. You don't need a lot of systems or data; those will plug into a good process and align well."

Ignacio likewise offers another high impact suggestion: spending time developing career paths for or increasing the capacity of the team. "The RevOps profession is quite limited in the number of folks who work in large orgs, so their shoulders carry heavy loads. Boosting morale across the RevOps team is a minor investment for a long-term return."

And finally, Fuller says that tactically speaking, you can achieve a quick win by streamlining intake and requests. Per his recommendation, use a case management system, and stop taking requests via Slack and email."

Your org can continue to implement changes over time incrementally or as a business-wide overhaul. No matter your approach to the roll out, it's crucial to align business objectives with RevOps processes for best results.

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Bring RevOps to Life

A RevOps strategy is a major key to scaling revenue generation. Most companies with an aligned strategy for this are theoretically performing RevOps, but centralizing the function in your business requires tactical considerations for implementation.

In addition to gathering key stakeholders and getting buy-in for your plan, you need to also streamline your process of making recommendations, which includes an approach to messaging that caters to each stakeholder's unique outcomes and goals. That's how you get everyone on board with RevOps.

When implementing recommendations incrementally, start with the quick wins that will have the highest impact on your business. When undergoing a total process overhaul, on the other hand, ensure that you have a change management plan in place to guide the transition smoothly.

Every business is different, so no two RevOps plans will look the same. But with the right systems, accurate data, and smart people, your RevOps function can have a huge impact on your business processes and your bottom line.

See how Carabiner Group can help you bring RevOps to life. **Schedule a free consultation today**.