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How to Rescue a Struggling Revenue Operation in 3 Steps

Situation: Your revenue operation is inefficient or difficult to scale and maintain. You're spending too much time and money supporting a system that doesn't meet your needs.

Problem: You're doing your day job and you don't have the bandwidth to configure an advanced quote-to-cash solution

The Real Problem: You don't have the expertise to design and manage a revenue operation that scales with your business and changes with your needs

Here's the remedy:

Step 1: Re-evaluate Your Business Needs

It's never too late to re-think your revenue goals. A tool like Salesforce Revenue Cloud, for example, is successful when it's built to adapt to changing business needs, but it often takes some time and iterative development to get there.

It's best to undertake this effort with someone who has a broad understanding of your business and deep expertise with your chosen tool. Ideally this person is in your company, but this is rarely the case. That's when you look to a managed services team.

Step 2: Internally Audit Your Operation

Once you've validated your business goals with your quote-to-cash technology vision, it is time to re-evaluate your operation. If your system is not meeting your business needs, your operation may be at fault.

You may have a poor environment strategy that keeps you from matching the speed of business requirements. Your release strategy may be hamstringing your technical team from delivering quality work and eroding confidence from the business. Use this opportunity to look ahead 6-12 months to ensure that a successful go-live also becomes a healthy operation.

Step 3: Reframe Your Goals and Measures

Now that you have identified your most pressing quote-to-cash needs and taken a hard look at your current operation, it's time

to bring it all together by tracking to broader business goals. Are you lagging on adoption? Creating too many touchpoints in your financial reviews? Track adoption today using login usage reports. Measure current transaction cycle time against the overall goal.

It's never too late to start measuring results. We won't know if we've gotten to point B if we don't start measuring from A.

If you don't have the bandwidth to do these right, let's chat.

Reach out for a no-pressure discussion at chatphil.com!

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