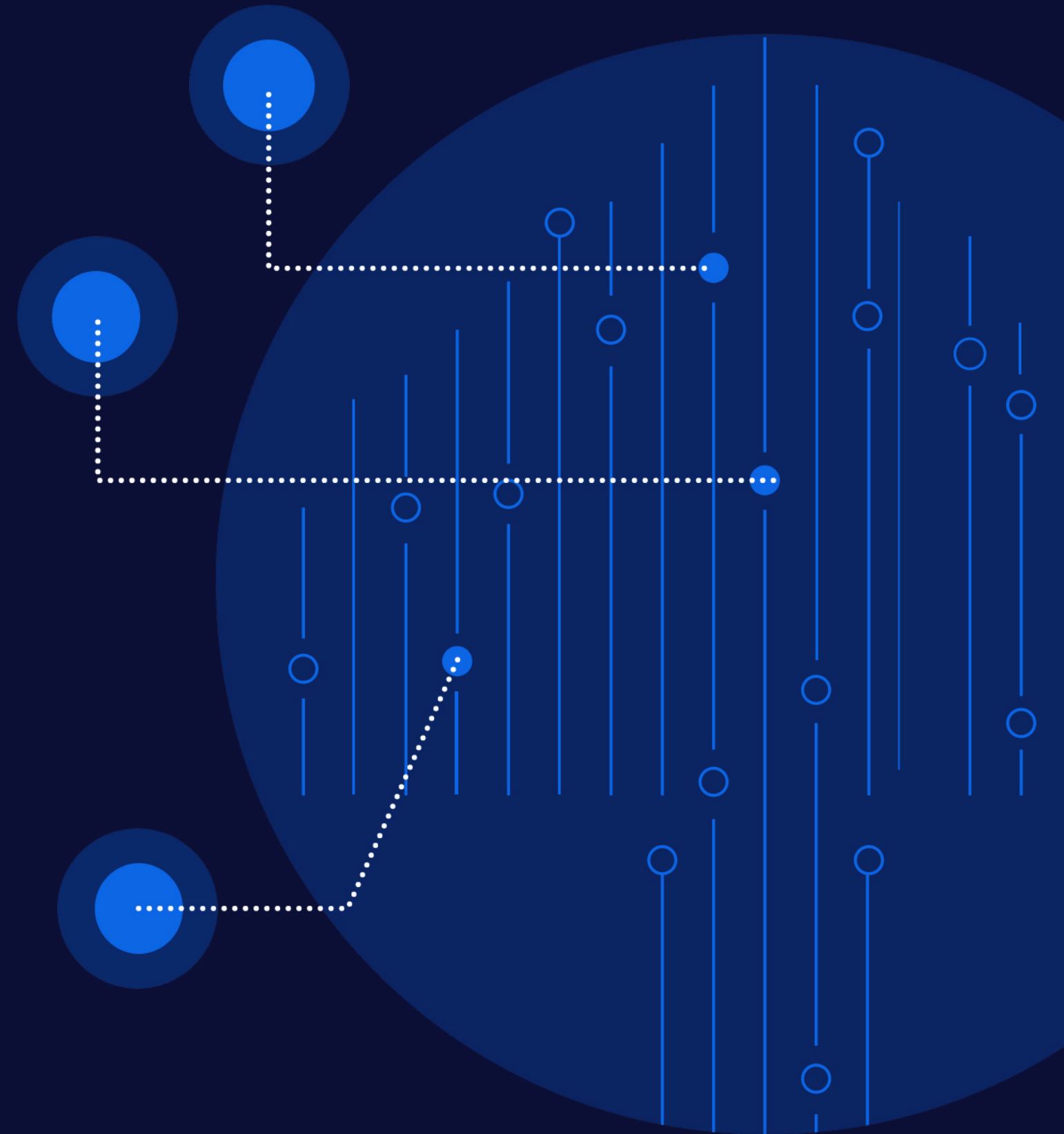




# Professional guide to **revenue operations**





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# The professional guide to revenue operations

## Why your team may be shifting to **revenue operations**

First, let's discuss how marketing, sales, and even customer teams are switching to a revenue operations model that centralizes tech stack management and data governance. We'll also cover how revenue ops professionals tackle their toughest challenges to get ahead of the game. RevOps is a rapidly-growing discipline that often rolls in marketing operations, sales operations, and customer operations - any operations team that touches business revenue.

One common point among the different roles is, of course, "operations" - the nuts and bolts of processing, delivering, or otherwise managing leads for marketing, closed-won deals for sales, or sales hand-offs and on-boarding for customer success. Other common points are the strategy, planning, and execution required to ensure mission-critical processes go off without a hitch. In addition, operations professionals are increasingly responsible for performance metrics and providing clear, insightful analytics across the full revenue funnel. Revenue ops teams need to architect a tech stack while also managing budgets, expectations, and adoption...not to mention tackling technical software-related issues.



All this software is giving rise to a more-centralized operations role. The common thread is that marketing operations is increasingly about more than just being the in-house Marketo expert; sales operations is about more than being a Salesforce admin; and customer operations is about more than managing customer accounts in Zendesk. Sure, the modern revenue operations professional often tends to be a software expert. But increasingly, revenue ops experts that manage revenue processes are responsible for:

## Tech stack management

Revenue operations is the guardian of the tech stack. RevOps manages software operations and troubleshooting outside of IT, and makes recommendations for which applications to keep, which to let go of, and which new applications to acquire.

## Technology budget

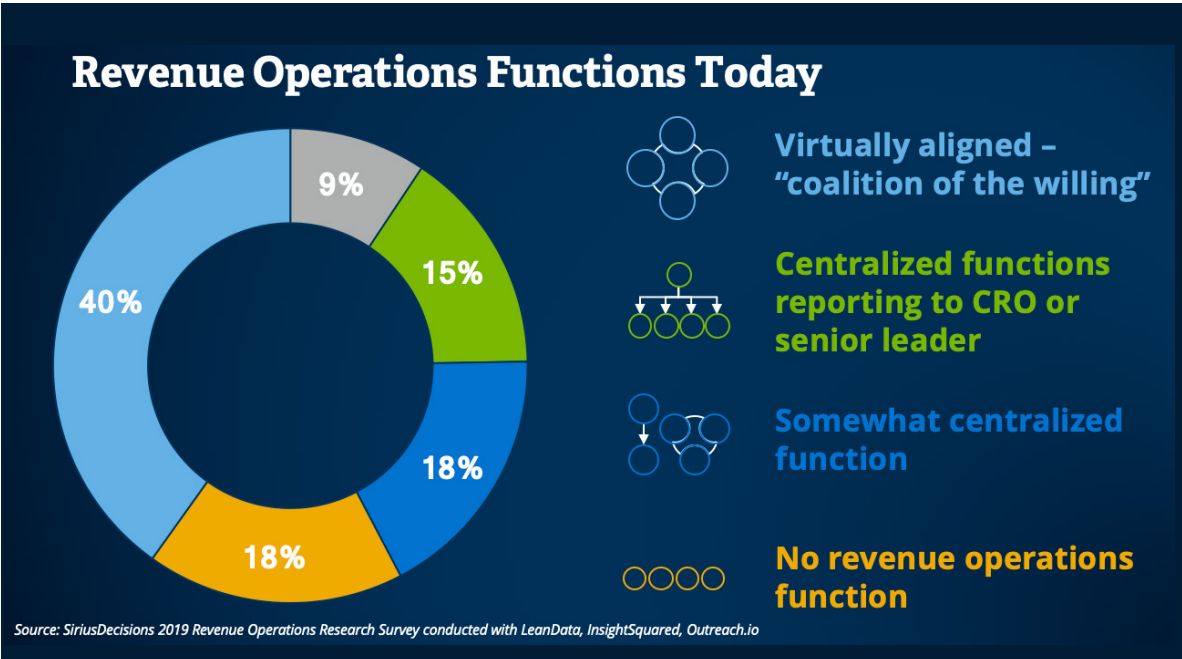
Revenue ops teams might not always have budget authority. However, more organizations now expect revOps to be both tech stack managers and tech stack accountants who track the ongoing and new costs of operations software.

## Data governance

The process of managing and distributing data assets within an organization. Governance for revOps teams can include a variety of use cases. RevOps might be responsible for lead data flow through the marketing funnel, or manage a digital asset management (DAM) tool to distribute sales collateral, for instance.

## Security

Being the keepers of the data also tends to put data security onto revOps professionals' plates. Data security measures include formal business certifications such as SOC 2 as well as more-specialized regulations such as GDPR and HIPAA (for health care).



Most organizations have already aligned, or are in the process of centralizing, revenue operations.  
Image courtesy - SiriusDecisions

# How **operations professionals** manage process + tech

Revenue operations professionals, and other operations professionals from marketing, sales, or customer success who are transitioning into the role, frequently manage critical processes across tech stacks and teams. Marketing operations and sales operations often overlap on a variety of tasks, including lead routing, managing outbound, digital asset management, and others. And since marketing operations, sales operations, customer operations all touch revenue processes, it's also typical to see overlapping use of a CRM, as well as a variety of shared tools listed below.



# Marketing operations

The business of managing leads to capture, process, and follow up with them efficiently. Marketing ops also typically partners with demand generation to execute marketing campaigns and measure performance via the marketing team’s MarTech stack.

## Typical processes include (but aren’t limited to):

Lead lifecycle management: The process of recording and deploying proper follow-up when a lead engages with your company, which often consists of sub-processes such as:

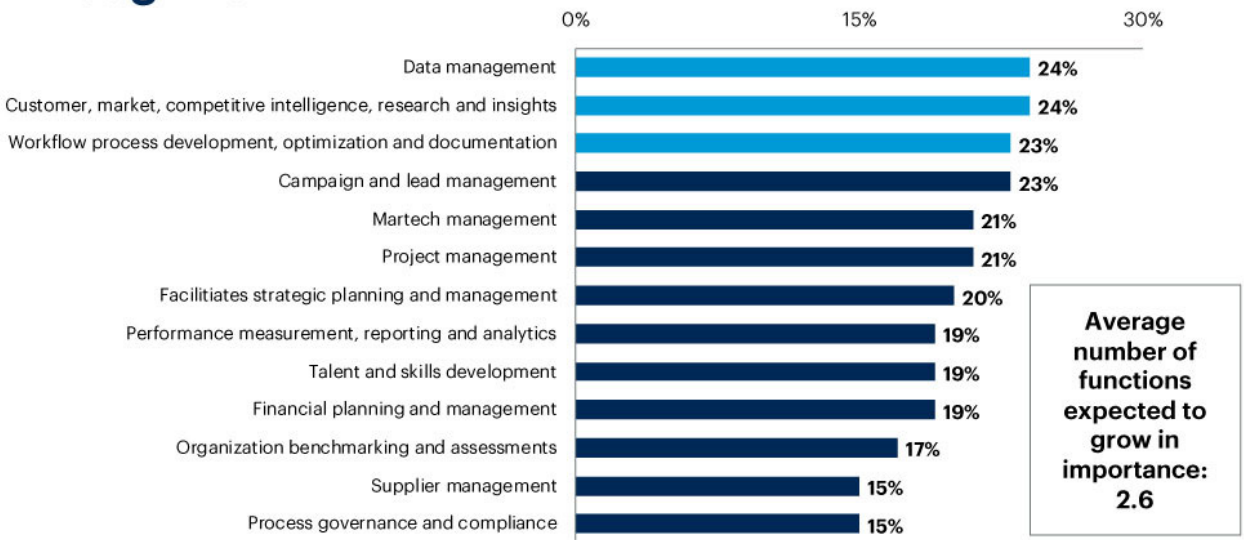
- Lead uploads - Uploading new lead lists into your system of record
- Lead enrichment - Using data enrichment to complete missing lead info
- Lead-to-account matching - Matching leads to existing accounts in your system of record
- Lead scoring - Flagging the hottest leads for sales to follow up with first
- Lead qualification - Working with sales development representative (SDR) teams to qualify leads for sales
- Lead routing - Routing appropriate leads to your sales team
- Marketing metrics and marketing analytics: Measuring and visualizing the performance of various marketing campaigns
- Promotion and advertising: Promoting marketing campaigns and assets via paid and organic channels, as well as driving top-of-funnel leads through conversion rate optimization (CRO) or lead form strategy and incremental testing

## Typical tech stack components include (but aren’t limited to):

- Marketing automation platform (such as Marketo, Eloqua, HubSpot, Pardot)
- Advertising (such as Google AdWords)
- Organic promotion (such as LinkedIn, Facebook, Twitter)
- Web analytics (such as Google Analytics)
- Creative + content tools (such as Adobe Creative Cloud, Wordpress)

For more details on the marketing operations role, see this list of modern challenges for marketing ops.

## Marketing Ops. Functions Expected to Grow in Importance Through 2022



Marketing operations in specific, and revOps in general, will need to focus more on data, insights, and workflow efficiency.  
Image courtesy - Gartner

# Sales operations

This multifaceted role is responsible for processing and payments for sales deals. Like with other roles, sales ops, marketing ops, and revenue ops are increasingly focusing on data, insights, and efficiency. Sales ops teams also manage sales enablement, sales data, and strategic planning for budgets and territories via the sales tech stack.

## Typical processes include (but aren't limited to):

- Quote to cash: The process of converting closed-won deals to revenue by processing contracts and payment details.
- Deal desk: The process of efficiently building consensus and approvals for non-standard sales deals among a variety of teams, including sales, finance, and customer success.
- New customer handoff: The process of arranging the transition of new accounts from the sales cycle into the customer success cycle
- Forecasting: The process of forecasting future sales based on current and future sales team capacity and pipeline
- Territory management: The process of divvying up sales territories to assign, and manage/update, among the sales team
- Enablement: The process of training and enabling sales with appropriate collateral
- Sales development/outbounding: Sales operations professionals also frequently partner with SDR teams to coordinate outbound sales motion.

## Typical tech stack components include (but aren't limited to):

- Customer Relationship Management (CRM) platform (such as Salesforce, Copper, Microsoft Dynamics 365, SugarCRM)
- Outbound email/sales engagement platform (such as Outreach, Salesloft)
- Configure-price-quote (CPQ) platform (such as Salesforce CPQ [formerly Steelbrick], Apttus)
- Conversation intelligence (such as Gong.io)

# Customer operations

This crucial team enables customers to succeed by working closely on specific projects and troubleshooting (often partnering with solutions architects). Customer ops teams also manage the status of customer accounts for renewal, upsell, or churn via help-desk, success platforms, and other apps in the customer operations stack.

## **Typical processes include (but aren't limited to):**

- Responding to incoming support requests: Via customer calls, help-desk tickets, or chat
- Prioritizing help-desk tickets: Ensuring the most important issues from the highest-priority customers always come first in the queue
- Logging notes from customer calls and emails: Recording new issues and progress on ongoing projects
- Coordinating renewals and upsells: Working to prevent churn and grow revenue opportunities for existing customers

## **Typical tech stack components include (but aren't limited to):**

- Help-desk (such as Zendesk, Freshdesk)
- Customer success platform (such as Gainsight, Totango)
- Contract/entitlement management (such as PandaDoc, SpringCM)
- Customer surveys (such as Qualtrics, SurveyMonkey)

## **Additional cross-functional apps include (but not limited to):**

- Project management/productivity (such as Asana, Wrike, Trello, Basecamp)
- Website chat (such as Intercom, Drift)
- Internal communications (such as Slack)



# The growing **challenges** of revenue operations

## Too much software!

Revenue ops professionals already know there are more than 7,000[3] software applications for marketing alone. To say nothing of the many software applications available to handle sales and customer operations. With so many choices, it can be challenging to locate the best software to fit a specific business need, but the enormous variety of software leads to other challenges.

## Skills gaps

There's too much new software, each of which has its own user interface and nuances. Maybe it's not surprising that 66%[4] of companies report a growing skills gap. Being proficient with a single platform as a system of record isn't enough. RevOps professionals need the ability to utilize a suite of different business applications fully.

## Lack of custom integrations

Having a varied software suite also poses problems when the apps themselves don't play well with others. Revenue operations professionals don't just capture lead details for marketing, or convert them to closed-won within CRM for sales, or set up their help-desk account for customer success. They need to flow specific, mission-critical data unique to their business with no loss of fidelity across different applications. In many cases, even out-of-the-box integrations aren't enough.

## Lack of technical/coding ability

While all revenue ops professionals tend to be technical, most aren't engineers. Some organizations resort to using in-house IT or engineering resources to close the gaps in their tech stack. Coding in-house integrations between different apps tends to result in brittle stopgaps that don't stand the test of time. For every other team that doesn't have these resources, the options are even more limited. RevOps teams either file an internal IT/engineering help-desk ticket and wait, or come up with a stopgap, which tends to involve tedious manual work.

## Lack of budget support

This is an age-old problem. Even though technology has become more prominent among revenue teams' budgets, it can still be challenging to get sign-off for new tools.

## Lack of institutional support

An ancillary challenge in operations is getting support from necessary internal partners, particularly from cross-functional teams that need new technology but aren't interested in taking ownership of either budget or usage.

## Lack of adoption and ownership

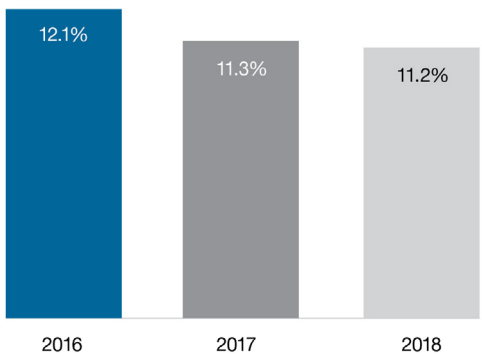
In a perfect world, once revenue operations teams acquire expensive new technology, their organization would immediately start using the new software to get the most out of it. The reality is that adoption can be inconsistent, and change management is difficult no matter what, especially if there isn't any internal product owner or champion.

## Growing ROI gap

Let's just say that buying expensive technology that nobody uses tends to raise questions from budget owners at the end of the quarter. The issue is more significant in the marketing space, where budgets have been contracting for years, while MarTech remains the #1 expenditure.

## Marketing Expense **Budgets**

Percentage of company revenue



MarTech is still the #1 expenditure for marketing teams, yet marketing budgets have been shrinking for years. Image courtesy - Gartner



There are now more than 7,000 software applications just for marketing.  
Image courtesy - ChiefMartec

# How **revenue operations** can tackle these challenges

Revenue ops professionals are finding success with a multifaceted strategy. The solution combines people, process, and technology to help revOps teams take control of their data across their entire organization.

## People

While revOps teams may seem to focus on technology, smart people management is an integral part of solving the challenges of the modern operations team. Important people tactics include:

- Building strong internal relationships with executive leadership.
- One essential step in securing new technology budget and driving adoption is securing executive sponsorship.
- Building strong internal relationships with cross-functional teams.
- Proactively partnering with external-but-related teams such as IT procurement, legal, and data security tends to make managing budgets and security issues more manageable.
- Finding and training the right team members.
- There's more to hiring than "culture."

Revenue operations leaders look for specific qualities that set great revOps managers from the rest, including natural inquisitiveness, analytical thinking, and a tendency toward process improvement.

## Process

It's common for ad hoc requests to pull revenue ops teams completely sideways. Instituting processes helps revOps teams prioritize inbound requests, get timely approvals, procure the right tools, and ensure the right people use them. Important process tactics include:

- **Formalized process for acquiring new tech**  
Revenue operations teams understand how to save themselves pain post-implementation. They use a full roadmap of their technical and business needs, involve executive/legal/security support early, and they research integration needs before purchase.
- **Formalized process for procurement**  
Experienced revenue ops teams know that acquiring new technology promptly and successfully implementing it isn't easy. The process not only requires strong partnerships with cross-functional teams, but also executive budget sign-off, smart timing, and a follow-up plan to drive internal adoption.
- **Formalized process for enablement**  
RevOps professionals understand that new technology acquisition carries with it the risk of low-to-no adoption. Including enablement materials and training into the planning process drive adoption and helps revenue operations teams ensure that every acquisition drives ROI.

## Technology

And, selecting the right technology helps. Astute revenue ops professionals understand the real costs of scoping, implementation, post-implementation support, and internal enablement. They also understand that new classes of software empower them to scale by automating manual processes and easily integrating their tech stack without having to write a single line of code. Software-related tactics include:

- **Buying for fit, not features**  
It's common for business software to have a dazzling array of different features. However, astute revenue ops professionals know that the best technology purchase isn't always the most complicated one. It's the one that will most clearly solve for their current use cases and take away their pain.
- **Build vs. Buy**  
Another common dilemma for revOps teams is whether to build solutions internally versus buying them. While there are many sides to the debate, experienced revOps teams understand that buying solutions tends to provide better results than building internally. Internal builds require costly IT resources to initially implement, as well as to maintain (forever). They also require internal enablement and functional support (both of which also subsequently require maintenance forever).
- **Publisher suite vs. best of breed**  
RevOps teams also frequently need to choose between acquiring apps from within a publisher's platform suite or individually picking best-of-breed apps. While there are arguments to be made for either side, most revenue ops teams prefer a best-of-breed approach, since best-of-breed apps tend to offer easier execution and faster time-to-value.

# Next steps

We've covered an overview of the major issues that revenue operations teams encounter, and specific strategies on how to tackle them. Next, we'll discuss specific, actionable strategies on how to buy MarTech and other new technology for business, how to align MarTech and other new technology with the rest of your organization, and how to build an operations team.

# Building the perfect **tech stack** for revenue operations

## Why your team may be shifting to revenue operations

This chapter will discuss the best way to buy the best technology to build out your tech stack – your marketing stack, sales stack, customer operations stack, or overall revenue stack. We'll include insights into managing technical gaps in your tech stack as well as a full walkthrough of best practices on how to procure new technology. What is a tech stack? It's the combination of business applications you use to execute essential revenue processes – from capturing leads for marketing, processing deals for sales, and managing renewals for customer success. So what's the best way to go about building one?

A good place to start is to forget the idea of a single, objective “perfect tech stack” because, not surprisingly, there's no such thing. But you already knew that. For example, consider the task of building a MarTech stack. Marketing operations professionals must choose from more than 7,000 different applications for email automation, metrics, website analytics, content management, social media, and many, many more. What's important is to not only pick the best possible choice for individual apps to suit your organization's unique needs but also to design a working ecosystem of apps that will collectively provide the solutions you need.



# The **challenges** in building your tech stack

You may have heard the statistic about how 50% of all IT projects fail. One of the most common causes of these failures is a lack of alignment between software projects and business goals. Sound familiar? Unfortunately, it's common for decision-makers to acquire new technology (or stick with suboptimal existing apps) based on reasons that have little to do with solving business pain, which include (but aren't limited to):

## **Cost**

Cost is obviously a concern for acquiring new technology (or sticking with existing solutions), especially as revenue operations professionals find themselves more responsible for managing software budgets. For finance and procurement teams, it's usually the top concern. Savvy operations professionals know there can be painful consequences for choosing the cheapest option, rather than the solution that will genuinely address their pain.

## **Most exciting/largest number of features**

Bells and whistles seem appealing at a glance, but as we'll discuss shortly, having too many features can lead to unforeseen problems downstream with adoption, ROI, and outright proficiency.

## **Improper scoping**

Not properly scoping a project in terms of scale, cost, use case, and stakeholders can lead to acquiring a solution that doesn't solve the real problem, isn't powerful enough, or that no one uses. Sometimes, organizations acquire new technology for the sake of it, or based on hearsay, rather than as the result of a deliberate, strategic process of first, determining a business problem/opportunity; second, determining the solution exists outside the current tech stack; and finally, beginning the search for vendors.

## **Institutional inertia**

Many operations professionals have a story about how their team continued to stick with a suboptimal tech solution "because that's how we've always done it."

## **Executive decision ("regime change")**

Another familiar story among ops professionals is how executives with budget authority made sweeping decisions that affected their tech stacks. These changes are commonly part of management transitions, which new executives decree radical tech stack changes (which don't always work out well for the operations teams who end up stuck with them).

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**Can't I just get everything I need from a [publisher suite] portfolio? Sadly, no. Your [technology] of choice does indeed make an excellent starting point for assembling your unique...ecosystem, but no single vendor offers a 100% complete solution.**

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*Forrester Research, Making Sense Of Enterprise Marketing Technology*

# Publisher platform suite **vs.** best-of-breed

We should also discuss some of the critical dilemmas in building a tech stack. A common decision when acquiring new technology is whether to build out a tech stack using apps from the same publisher suite, as opposed to picking individual applications. There are differing opinions on the topic, though analysts such as Forrester Research believe that “no single vendor offers a 100% complete solution.”

Because every organization’s unique needs are different, it’s difficult to give a single, objectively correct answer to this question. It is, however, worth considering these additional factors in your decision:

## **Ease of use**

While apps that belong to a single publisher’s suite are more likely to have standardized user interfaces, best-of-breed apps often tend to distinguish themselves in terms of user-friendliness.

## **Functionality**

Best-of-breed apps tend to win over suite applications in terms of functionality - their more-robust features make them best-in-class. That said, some apps may have a vast quantity of less-than-useful or not fully-developed features that may make the app itself less valuable overall.

## **Flexibility**

Flexibility is another area in which best-of-breed apps tend to win. One of the hallmarks of best-of-breed software is frequent updates that continually improve and expand on functionality to give users more options and better interoperability with other applications.

## **Current and future fit**

The ultimate arbiter of why you should go with software A versus software B should be fit to your use case, today and in the future. It’s worth paying attention to the way your apps handle considerations such as data (collection, storage, transfer) and security (authentications, permissioning, and data protection). Both issues will only become more important as your business scales, and you find yourself with more and more customer data under management.

## **Open API**

It’s becoming increasingly important for business software to have an open API. APIs are the level of software at which one application “talks to another.” Having an open API gives users more flexibility to pass data between different pieces of software. Not having an open API means less flexibility and more potential roadblocks.



# Build **vs.** Buy

Another critical dilemma in purchasing new technology is the question of building versus buying, particularly on the issue of integrations - the software connections that link different applications to each other to let them share data. If you’ve ever had to flow marketing campaign leads from a marketing automation platform (MAP) to a CRM, or copy in-depth account details from your support help-desk into an enterprise resource planning (ERP) tool to confirm payment status, you know this pain.

While there are firms that opt to request internal builds on integrations, such projects require valuable IT resources. Unsurprisingly, engineering organizations report their #1[8] pain remains capacity, which is just one of many essential points to consider:

### IT resources

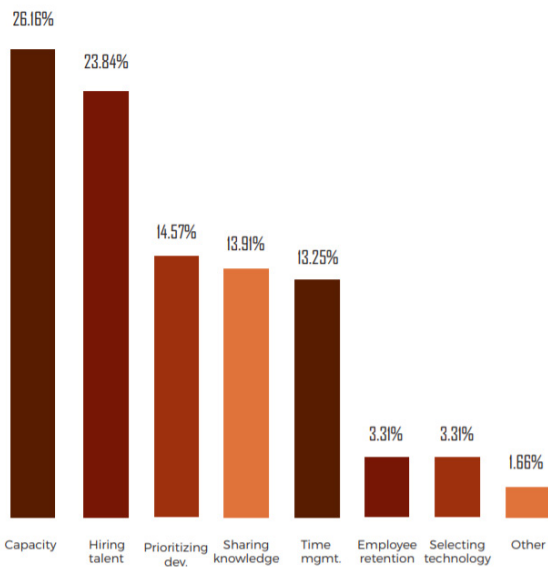
As mentioned, IT organizations struggle to staff every project on their list. It’s frequently a challenge for companies to justify sending engineering teams to work on integrations for internal business software when those same engineers could be working on developing a better product.

### Long-term maintenance

Sadly, internal integrations aren’t one-and-done projects. While your team may finally get IT to build a functioning integration between your CRM and ERP today, future version updates to either application will often break the integration, bringing you back to square one. Internally-built integrations tend to create significant overhead for engineering teams over time.

### Permissioning

Operations professionals understand there are day-to-day challenges with authentications and account permissions. Some team members absolutely need administrator-level access to certain apps; others can get by with read-only. Sharing data across different applications to only the appropriate parties with specific access can become a headache in itself.



Lack of capacity is the #1 pain point for engineering organizations - making it challenging to justify internal integration projects. Image courtesy - CodingSans

# Tech stack **buying cycle checklist**

Now that we’ve covered the potential pitfalls involved with acquiring new technology, we can dive into a step-by-step checklist to help you acquire new technology in the most expedient and painless way possible.

## Pre-purchase Prep

### Scope out a tech stack roadmap

In an ideal world, revenue operations professionals have the time to scope out a strategic roadmap that maps out their current and future tech stack in aggregate, accounting for current and future use cases. Roadmapping new tech stack components can be both a functional and creative exercise. The idea is to map your tech stack against future projects and any customer experience (CX) initiatives for your team. For examples of inspiring tech stack roadmaps, take a look at the annual Stackies awards.

### Scope out a requirements map

In the real world, it’s a good idea to at least create a requirements map, even in the form of a simple spreadsheet. You can fill it out with features, pricing, integrations, security, and other factors that are important to your use case, now and in the

future. It may also be worthwhile to include prompts for things like peer feedback, referral feedback, assessments from leading analyst firms such as Gartner or Forrester, or even reviews from sources like G2Crowd and TrustRadius. Just filling out a spreadsheet and placing potential solutions side by side can give you more of a strategic overview of your options when the time comes to choose.

#### Example Statement of Work for [NEW APP]

[From Tray.io blog](#)

Purpose & goals:  
<add purpose and goals for new app acquisition + implementation here>

Stakeholders:

CONTACT:	ROLE:	CONTACT DETAILS:
	Business champion	
	Sponsor	
	Stakeholder	
	Project manager	
	Vendor	

*It may make sense to include a statement of work as part of your procurement and implementation process.*

### Make friends

Having a strong working relationship with relevant parties is an extremely effective way to set yourself up for success. Friends in the IT procurement department can provide speedy processing of new technology orders. Friends on the executive team can provide responsive budget approval and help enforce adoption and enablement once you’ve brought your new tech in-house. Friends in legal and security can help you ensure you’re following every guideline and whisk you through security and legal reviews. Friends who will be end users, whom you can lead to training and enablement so they actually use the new apps and provide ROI on your purchase. Even friends in customer experience (CX) who can help you map eventual CX goals to items in your tech stack.



# Tech stack **buying cycle checklist**

## Buying Cycle Process

### Scope out implementation

Even if you haven't created a full requirements, at a minimum, you'll need to scope out specific needs in the context of your use case, costs and implementation timeframes.

### Identify key stakeholders

Once you have a fully scoped-out plan to acquire your next piece of software, it's a good idea to immediately identify everyone who will be involved in the process and begin clearly communicating expectations and timeframes. Stakeholder involvement might include, but not be limited to, consulting on product usage scope, actively participating in the evaluation process, or actively participating in enablement. Some larger organizations utilize a cross-functional product council consisting of members throughout the organization to give more stakeholders "skin in the game" and drive active participation in the process. And, executive sponsorship can be especially important to not only push through procurement but also drive adoption.

### Technical evaluation

The process operations professionals know all too well. Again, to minimize painful delays or buying something the business doesn't truly need, it's a good idea to have your use case and objectives fully scoped, including technical, process-related, and people-related limitations that are causing your pain. Communicating these needs upfront will also enable vendors to provide the most relevant example materials and provide the most relevant product demo to help your decision. (Your evaluation should also include factors such as information security and any legal restrictions you've identified with your security and legal teams.)

### Integration assessments

An integral part of your evaluation process should be checking the status and availability of integrations between any new apps and your existing tech stack. API integrations are now fundamental to successful implementations of new technology. Your exciting new app may provide significant value against your use case, but could lead to logistical headaches if it doesn't play well with the other apps in your stack.

### Scope implementation with champion

A significant step in the process is to finalize implementation details and expectations with your business champion. This step should definitively answer questions about who will need access to the new application, who will use it regularly, for what purpose, what data will need to be accessed, what deliverables will be involved, and when. It's also important to account for implementation and training in your schedule, ideally at times that are minimally disruptive for end-users and don't conflict with other major business initiatives. Some organizations opt to use a full statement of work to document this process.

### Purchase cycle

After making that fateful decision, there's always going to be a wait of some kind when making a purchase. As mentioned, operations professionals minimize the wait by scoping out project size, budgets, and partners in advance.

### Enablement

Beyond asking executive sponsors to enforce the adoption of your new app, a significant driver of adoption is internal enablement. One best practice is preparing enablement materials in advance of implementation, including training and additional collateral.

# How to **align** your tech stack with your organization

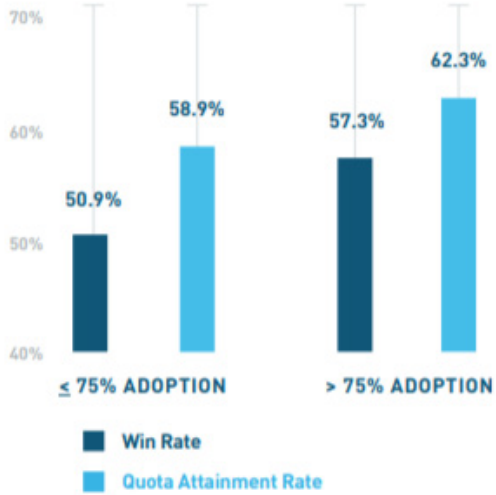
Why your team may be shifting to revenue operations

As an operations professional, you know how important it is to use software that makes sense for your organization and team. Acquiring technology that isn't a good fit for your use case or the people who need it is a recipe for a pile of software nobody uses. In addition to being a waste of time and effort, those low adoption rates can lead to low return on investment. And the low ROI leads to uncomfortable questions at the end of the quarter/year when budget leaders ask why your team is spending so much on software no one uses or isn't creating value for the business.

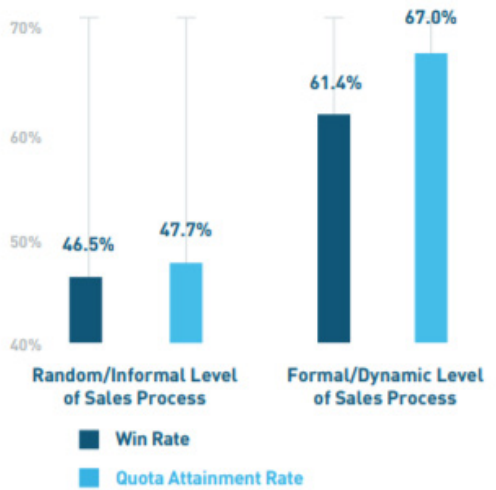
Software adoption matters to businesses and frequently has a measurable effect on the bottom line. For example, research shows that sales organizations with less than 75% CRM adoption have noticeably lower win rates and quota attainment[9]. The converse is true - higher CRM adoption leads to noticeably higher win rates and quota attainment.

In our previous chapter, we discussed how to build your tech stack. In this chapter , we'll cover best practices on how to ensure the tech stack you build fits best with your people, processes, and business objectives.

Sales Performance as Related to CRM Adoption



Sales Performance when CRM Adoption >75% Related to a Company's Level of Sales Process



Higher CRM adoption rates lead to higher sales win rates and quota attainment.  
Image courtesy - CSO Insights

# Phase I: Budget approval and planning

As mentioned previously, an essential aspect of smoothly and efficiently implementing new technology is having (or making) friends.

At a minimum, it's worthwhile to build strong relationships with the following parties:

## Your budget owner

Most of the time, your budget owner is your boss. At the risk of stating the obvious, having a good relationship with your boss will be important to get their buy-in for new technology. Depending on your situation, you may need to submit a business request that outlines your:

- Objective(s)
- Problem statement / Reason(s) for acquiring new technology
- Cost(s)
- Benefit(s) and/or saving(s)

You may also be expected to provide a full cost-benefit analysis for your next acquisition.

## IT/procurement

Depending on the size and terrain of your organization, you may also have to go through IT to attain any new technology. Briefing your partners in IT on your business needs, technical needs, timeframes, and budget - as well as making arrangements to remove much of the technical lift from their shoulders as possible - will help ensure a smoother implementation.

## Security + Legal

You're already familiar with the trend toward growing data privacy regulations such as GDPR for Europe and HIPAA for healthcare. So you know it's essential to work closely, and early, with your security and legal teams to ensure any new technology you procure complies with every InfoSec regulation your company follows before you acquire it.

## Your end-user(s)

It's also helpful to have a working relationship with end-users who are using or will use your new technology. Having a working relationship means you can partner closely on implementation and enablement, and garner early feedback on whether a new app is a good fit and will deliver value.

## A note about timing

It's also vital to be organizationally ready for new tools, particularly those that may require weeks (or months, more likely) of implementation. A best practice is planning for a sufficiently long pilot period to ensure full adoption, end-users getting over any learning curves, integrating with necessary systems in your existing stack, and collecting enough data. Plan your implementation time against quarterly/annual budgets accordingly!

# Phase II: Identifying stakeholders and roles

As we've mentioned previously, a significant step in acquiring new technology is identifying stakeholders.

These may include:

- **Business champion**  
The original requestor of the new technology.
- **Sponsor**  
Your budget owner.
- **Product manager**  
Yourself or a colleague who will manage procurement, implementation, and post-implementation, with an understanding of the pain of the business users well enough to map product features to business needs.
- **Stakeholder**  
Any additional stakeholders in the process.
- **Vendor(s)**  
The vendors you're considering.

Of these parties, you may find yourself working with:

- **Operations**  
Your own team. It's common for revenue operations to have the most insight into new technology to acquire and act as subject matter experts, enablers, and project managers for implementation.
- **IT/procurement**  
May be involved as stakeholders to help with procurement and implementation.
- **Security + Legal**  
Likely involved as stakeholders to help vet new technology purchases against any data security or legal issues.
- **Customer experience (CX)**  
May be involved as advisors to help you map specific tech stack features against current or future customer initiatives.
- **Additional cross-functional stakeholders**  
Depending on your company's size and makeup, it may make sense to recruit other stakeholders for tech stack adoption across your organization.

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**Who are your key stakeholders as you acquire new technology?**

**Do you need budget approval, implementation support, enablement for adoption?**

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# Phase III: Ownership, adoption, and enablement

Operations professionals know implementation is an ongoing process that never really ends, thanks to version updates or feature releases, changing business needs, and growing teams. However, driving ownership at every step of the procurement, implementation, and adoption journey maximizes your return on investment and minimizes painful delays.

Here are some tactics to ensure every stakeholder takes ownership of their role along the way:

**Clearly communicate expectations upfront**  
It's essential to clarify expectations in advance with regards to roles, expectations, schedules, and scope of work. However, research shows that the leading cause of software project failures is changing or poorly documented requirements[10]. It's crucial to lay out a vision for your current and future tech stack as well as to communicate and document the role each stakeholder will have.

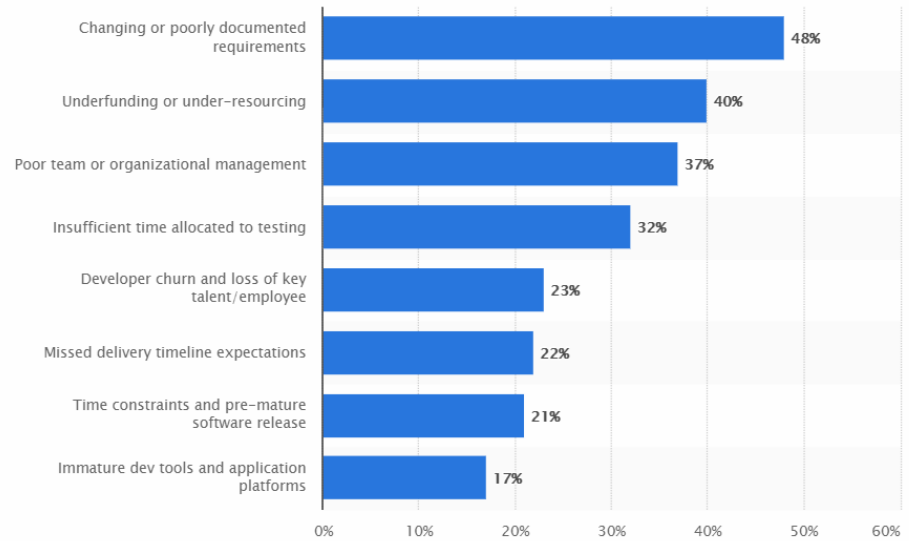
**Identify an internal owner to own KPIs**  
As we mentioned, organizations frequently expect their operations teams to be subject matter experts on software. However, it's often unreasonable and counterproductive to expect operations teams to own all KPIs for every app, particularly when they aren't the primary users. A best practice, whenever possible, is to identify an internal owner of any new software to own the KPIs.

**Statement of work**  
If applicable, consider making ownership official by issuing a statement of work to your business champion and/or technical users.

**Executive sponsorship**  
As you might expect, executive buy-in can also help enforce adoption.

**Consider instituting a product council**  
A product council consists of representatives of every major functional team in your organization to help oversee the deliberation, procurement, and adoption processes.

Leading reasons for software project failure according to developers worldwide, as of 2015



The leading cause of software project failure is changing/poorly documented requirements.  
Source: Statista



**A note about product councils**

Building a cross-functional product council can act as a forcing function that drives home the importance of making timely tech stack additions. If you’re not confident in your ability to assemble such a group, it may be worthwhile to seek executive sponsorship to get it off the ground. When the time comes to escalate the procurement of new technology or to enforce adoption of an expensive piece of software, you may find it useful to have more voices arguing for your point than just your own!

**A note about enablement**

As you know, once you’ve finally acquired your shiny new technology, your job isn’t over. Another critical piece of the puzzle is clear documentation to enable users and ensure they make use of their new software. However, a shared burden for operations professionals is becoming the in-house subject matter expert for troubleshooting any new software by default. Providing enablement materials can offload this burden and help your team members self-service (while you and your operations team focus on more-strategic matters).  
To enable your team to self-serve, it’s a good idea to consider one or more of the following:

**Internal product training session(s)**

Holding internal training session(s) is one of the most effective ways to enable internal users. It’s often a good idea to make use of your vendor’s customer success team to do the heavy lifting on such sessions. When possible, consider recording and archive training sessions for future use to enable future users.

**Internal documentation**

Keeping documentation on hand, whether that includes full walk-through materials or even basic tip sheets.

**Provide a direct path to vendor support teams**

It’s a good idea to remove as many barriers as possible between your technical users and your vendors’ support teams. If possible, sharing contact information and arranging account team calls directly between your team and vendors gives your users the most direct access to subject matter expertise while preventing yourself from being a bottleneck.

Become a revenue operations  
lead and **build a team**





# Become a revenue operations lead and build a team

With the incredible explosion of software-as-a-service (SaaS) applications for business, which is expected to top \$150B in 2020[11], there's an increasing need for operations professionals to manage them. Operations teams need leaders. And as you might guess, there's more to leading operations teams than being really good at using software (though that definitely doesn't hurt).

Let's first discuss the skills that set operations leads apart and help them successfully lead their teams. Much has been written about leadership and team management in general, but we'll be focusing on skills that specifically apply to working in revenue operations roles for marketing, sales, or customer ops.

## Strategic thinking

Thinking strategically helps operations leaders break free of the treadmill of fielding ad hoc, day-to-day requests from around the organization. A strategic approach means mapping technical and team needs to company goals, as well as being able to plan out and execute on budgets, timetables, and staffing for specific projects.

*Example: If a company's goal is to significantly increase top-of-funnel leads next year, revenue operations leaders may look to grow their MarTech stack with additional technology to drive awareness and leads, such as SEO analytics, paid search optimization, or conversion rate optimization (CRO) tools. Tactical planning for this project will break down to budget estimates, tool evaluations, finding product owners, procurement, and driving adoption through enablement. Strategic thinking also encompasses the essential abilities of goal-setting (for both operations leaders and their team's careers) and prioritizing projects ruthlessly. Fortunately, there's something that can help with that.*

## Analytical thinking

Thinking in terms of metrics helps operations leaders clearly justify budgets and projects. Operations professionals get clarity on prioritizing their to-do lists by viewing them through the lens of potential business value for each project, compared against potential costs and work hours required to implement. Being able to think and communicate in terms of metrics and business value also helps operations leads advocate more strongly for team support and executive sponsorship on key projects and budgets. Over any learning curves, integrating with necessary systems in your existing stack, and collecting enough data. Plan your implementation time against quarterly/annual budgets accordingly!

## Communications skills

Being able to clearly communicate is essential for operations leaders for many reasons. Obviously, as a team lead, revenue operations leaders benefit from strong communication skills to keep their team members aligned with clear expectations and ongoing support. In addition, managing a company's tech stack is a responsibility that can be both highly technical and seem more than a little arcane for other busy team members, who may only want to hear about what's in it for them. Ideally, operations leaders need to be able to distill complicated technical and business concepts into simplified talking points that anyone can understand. A best practice for communicating revenue operations topics is tying specific concepts to business value points that matter to the audience.

*Example: It'll probably be hard to get your marketing VP's attention by complaining about how your current marketing platform handles your marketing database poorly. It'll be much easier to get their attention by pointing out that more than 50% of online customers switch brands without personalized marketing messaging, while tying it to the increase in unsubscribe rates you've noticed this quarter. (And if you can follow up with a clear plan to fix the issue by replacing it with a marketing platform and other tools that will provide a stronger fit for your use case within budget, you're well on your way to not just continuing a conversation, but leading actual change!)*



# Become a revenue operations lead and build a team

## Consensus building

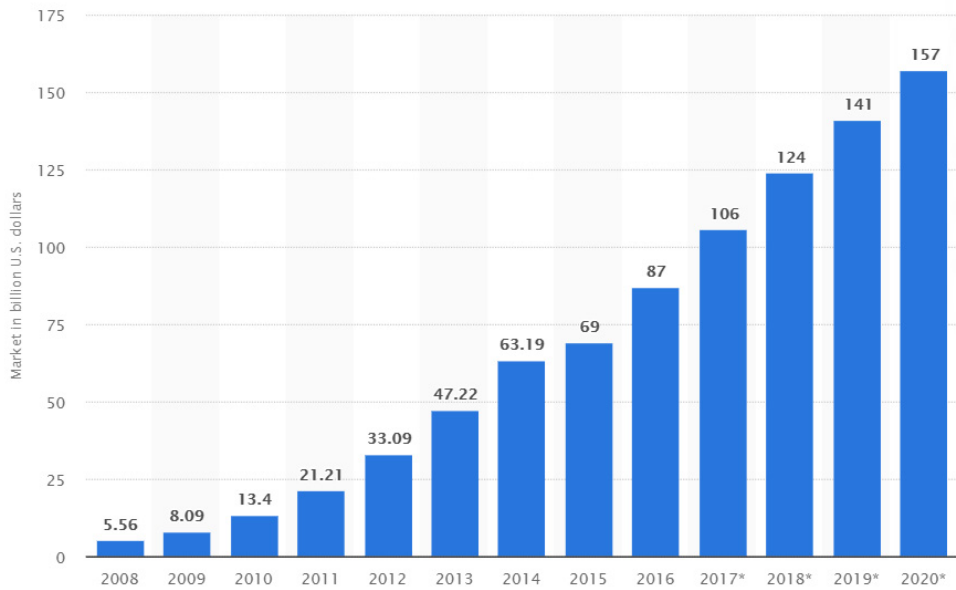
While it's easy to think of revenue operations as caretaking software, launching larger operations initiatives is a team sport that requires participation from multiple stakeholders, which might include IT procurement, legal, InfoSec, and budget owners, among others. Driving adoption for newly-acquired technology requires building consensus around technical users and product champions to ensure team members actually use the expensive new software you spent months tracking down, evaluating, and finally implementing. In all cases, it's important to be able to bring different stakeholders together to support and push group projects across the finish line.

## Creative problem-solving

In a perfect world, everyone would get exactly what they want, exactly when we need it. Revenue operations professionals know they don't live in a perfect world. They don't always get the budget they requested for the technology they absolutely needed within the timeframe they specified. In addition, out-of-the-box software may not do everything they need, particularly in the face of unexpected, 11th-hour requests. Operations leaders benefit greatly from the ability to think on their feet and devise efficient solutions and processes that require minimal lift from themselves and their teams while hitting their objectives.

## Enablement and education

As de facto technology leads sitting outside of IT, revenue operations are also de facto thought leaders. They hold the keys to the tech stack kingdom, so it's common for organizations to expect them to be subject matter experts (and unfortunately, in-house tech support). Being able to rapidly enable team members to relieve their technology-related pain (or quickly refer them to someone who can) may seem like the hallmark of a good revenue ops leader. However, great revenue operations leads provide sufficient training and enablement materials so that team members can self-serve[13]. By removing themselves as bottlenecks in process, great revenue ops leaders empower their teams to execute faster, iterate faster, and scale faster.



The SaaS market will grow to \$157B worldwide by 2020. *Image courtesy - Statista.*



# Technical proficiency for revenue ops leadership

It’s no secret that revenue operations as a discipline is becoming more technical. It’s increasingly common for companies to expect leaders in marketing operations, sales operations, customer operations, and business systems to understand and diagnose the more-technical details of their tech stack.

Some operations professionals have already chosen to dive into the world of coding, learning languages such as SQL to run data-base queries for marketing analytics or Javascript to set up web tracking with Google Tag Manager and other web-based tools. However, new developments in business software suggest an alternate path to accomplishing software-related tasks. Here are some specific trends and technical topics for revenue operations professionals to explore to expand their domain expertise and better position themselves as leaders:

### APIs

One way to think of an application programming interfaces (APIs) is as a wrapper or container for software, used to deliver the software and its data. When different software applications interact

with each other, such as passing data among themselves, they do so at the API level. (To learn more about APIs, see our article, “How do APIs work?”)

### API integrations

The most common way that software shares data is by way of an API integration - an API-level connection between different software applications. While different software products frequently pass data among themselves by way of API integrations that exist in as pre-built, native integrations between those services, it’s also common for software applications to “talk to” each other via alternate means. (To learn more about API integrations, see our full guide, “What are API integrations?”)

### Webhooks

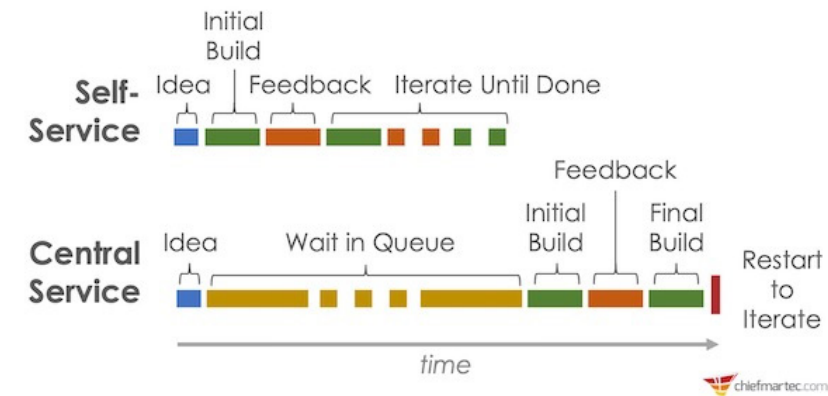
Webhooks are an alternate means by which software can pass data, even without a natively-built integration. (To learn more about webhooks, see our full guide, “What are webhooks?”)

### Low-code

So-called “low-code” solutions now allow less-technical business users to build software solutions without writing a single line of code. This new category of software is growing rapidly. Research suggests this already multi-billion-dollar market will grow to more than \$20 billion in size by 2022[14].

### General Automation Platforms (GAP)

General Automation Platforms combine all of the above in a single, easy-to-use package. By offering a low-code environment, they empower revenue operations leaders to directly connect software applications at the API level (as well as via webhooks and additional means such as HTTP and FTP). GAPs also give revenue ops leaders the ability to orchestrate complex processes among different applications with automation, such as managing the entire lead lifecycle, quote-to-cash, and new customer on-boarding.



Smart revenue ops leaders enable their teams to self-serve, removing themselves as bottlenecks. Image courtesy - ChiefMarTec

# Hiring a revenue ops team

We’ve covered process and technology, but in order to truly become a proficient revenue operations leader, it’s important to understand how to manage people. Working in operations carries its own set of unique challenges, which tend to favor certain approaches, and in some cases, certain personality types.

## Hiring for proficiency

The first question most teams ask when seeking a new revenue operations hire is whether candidates have the technical chops. Many teams use tried-and-true tactics such as take-home or on-site tests and probing interview questions. This is obvious, standard-issue stuff, and depending on your team’s situation, may be mandatory to cover software usage and problem-solving.

## Hiring for learning potential and curiosity

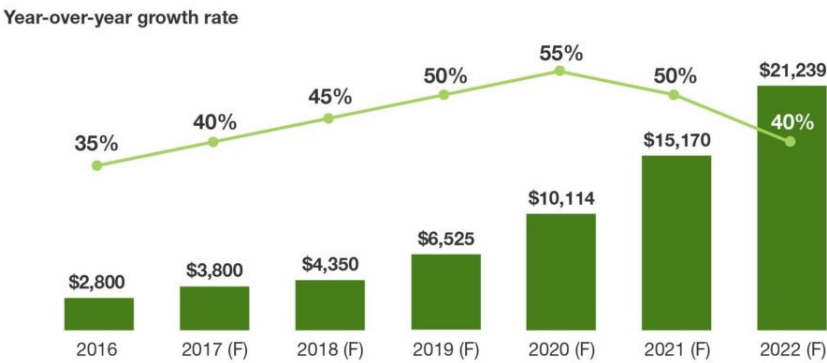
The first question most revenue operations leaders ask when seeking new hires is whether candidates have the ability to learn. One indicator is a growing list of software and technical proficiencies that should have accrued on your candidates’ resumes over time. Another key indicator is the way candidates express their natural curiosity and propensity to learn, such as through any courses they’re currently taking or have recently completed,

or any professional communities they’ve taken the initiative to join. There is also, of course, something of an X-factor you’ll learn about when speaking directly with candidates for the first time. Revenue operations leaders tend to look for active curiosity in candidates and engage them with open-ended interview questions (that can’t be answered with a simple “yes” or “no”) that don’t necessarily have “right” answers, but give candidates the opportunity to ask follow-up questions.

## Hiring for an operations mindset

We’ve covered the most important skills for revenue operations leaders above. Team members ideally evince many of the same characteristics, and are solutions-focused collaborators who are expert problem-solvers. However, for better or worse, revenue operations team members generally aren’t the focus of a company’s attention. Unless, of course, something’s broken. When building out a revenue operations team, it’s important to be realistic about the level of visibility a revOps team generally receives. Revenue operations professionals understand that it’s OK to be an “unsung hero.” RevOps leaders understand the importance of recognizing their team’s efforts and achievements in ways that are most appropriate for each team member.

Projected low-code development platform market growth



Low-code development is already a multi-billion-dollar market that will grow to \$20B+ by 2022. Image courtesy - Forrester.





# Revenue operations team org structure

At many rapidly-growing companies, it’s common for revenue operations teams to be short-handed. (At smaller startups, revenue ops pros are frequently an army of one.) But over time, as revenue operations teams grow, it may make sense to specialize team members into specific functions to expedite processes.

Next, we’ll discuss a potential org structure for a developing revenue ops team. The list is provided in approximate order of team growth/hiring - over time, as your revenue operations needs expand, you may wish to consider addition new roles in this order.

## 1. Team lead

The de facto tech stack subject matter expert and frequently the first point of contact with the rest of the organization. Revenue operations team leaders ensure their team is working in alignment with company goals, and keep everyone on target. Team leads can also act as all-rounders who provide other vital functions such as taking ownership of performance metrics and delivering analytics to executive teams. They may also act as project managers to protect their teams from being distracted by ad hoc requests by filtering and prioritizing.

## 2. Platform team

Over time, revenue ops leaders may wish to hand over the proverbial keys to the kingdom - that is, administrator and governance duties for the software in your tech stack - to other team members. While team leads should remain in the loop about technology developments (such as cancelations, renewals, or need for new acquisitions), it may make sense to delegate day-to-day ownership of actual software to other team members, particularly for software applications that either see a high volume of external requests (such as sales reports for a CRM) or are potentially high-maintenance (such as due to technical or security-related issues that are exceptionally time-consuming).

## 3. Analytics team

As your team and data needs scale, it may make sense to delegate performance metrics and data visualization. While performance metrics are important to keep your revenue ops team (and your entire company) moving in the right direction, they can be extremely time-consuming to generate. Many modern business applications generate metrics in silos that keep data separate, which means that creating aggregate reports can frequently boil down to hours of manual busywork logging into multiple platforms to copy-paste data from one location to another. Breaking analytics into a dedicated team may make particular sense for companies that require frequent reports.

## 4. Project management

On any given day, revenue operations teams tend to have many important tasks in their queue. However, they also work collaboratively with many other teams across their organizations, and constantly receive ad hoc requests for technical assistance, reporting, strategy, and many other topics. Any single request could take your team sideways, so it’s incredibly helpful to productivity to have a separate team member on hand to filter and prioritize these requests as they pop up. As a revenue operations team lead, you’ll likely start out being the gatekeeper, but over time, it may make sense for you to delegate this important duty as well.

Platform Operations	Campaign Operations	Marketing Intelligence	Development Marketing Operations
<b>JOB DUTIES:</b> <ul style="list-style-type: none"><li>Administration</li><li>Architecture</li><li>Governance</li></ul> <b>CHARACTERISTICS:</b> <ul style="list-style-type: none"><li>Systems-Thinkers</li><li>Coding exposure</li><li>Creative problem solver</li><li>Attention to detail</li></ul> <b>JOB TITLES (when specialized):</b> <ul style="list-style-type: none"><li>POPs Manager</li><li>POPs Architect</li><li>POPs Admin</li></ul>	<b>JOB DUTIES:</b> <ul style="list-style-type: none"><li>Campaign Production</li><li>Campaign Measurement</li><li>Project Management</li><li>SLA Tracking</li></ul> <b>CHARACTERISTICS:</b> <ul style="list-style-type: none"><li>Attention to detail</li><li>Responsiveness</li></ul> <b>JOB TITLES (when specialized):</b> <ul style="list-style-type: none"><li>COPS Specialist</li><li>COPS Manager</li></ul>	<b>JOB DUTIES:</b> <ul style="list-style-type: none"><li>Reporting</li><li>Prescriptive Analytics</li><li>Controlled Tests</li></ul> <b>CHARACTERISTICS:</b> <ul style="list-style-type: none"><li>Data nerds</li><li>Marketing exposure</li></ul> <b>JOB TITLES (when specialized):</b> <ul style="list-style-type: none"><li>MIOPs Analyst</li><li>MIOPs Database Admin</li><li>MIOPs Data Scientist</li></ul>	<b>JOB DUTIES:</b> <ul style="list-style-type: none"><li>Pre-Sales Tools Dev</li><li>Custom Integrations</li><li>Web Design/Dev</li><li>Email Design/Dev</li></ul> <b>CHARACTERISTICS:</b> <ul style="list-style-type: none"><li>Inventor</li><li>Creative problem solver</li><li>Clean code obsession</li></ul> <b>JOB TITLES (when specialized):</b> <ul style="list-style-type: none"><li>DevMOPs Engineer</li><li>DevMOPs Developer</li></ul>

One potential org structure for marketing operations divvies up platform ownership, analytics, campaigns, and R&D.[15] Image courtesy- Etumos.

# Takeaways

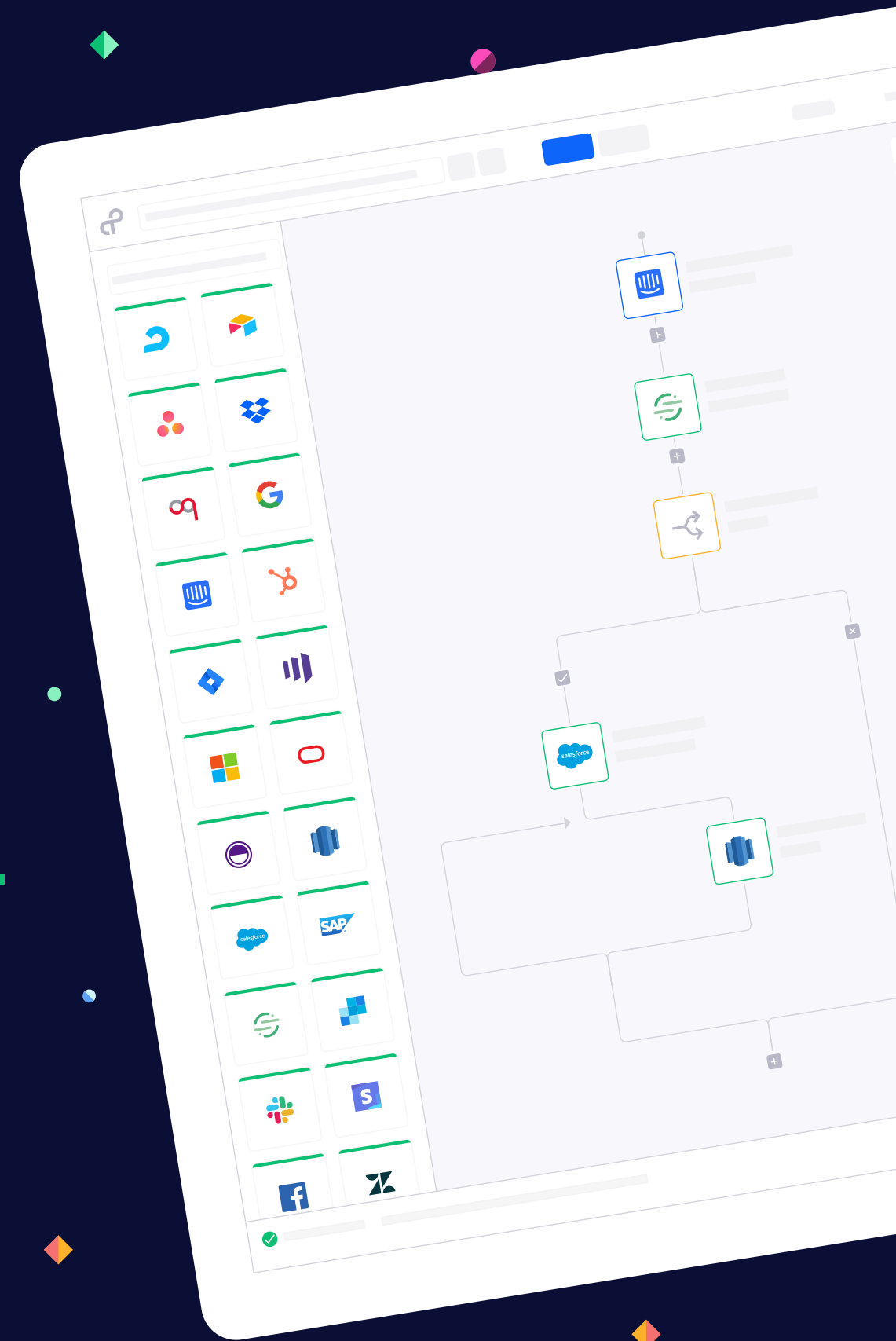
You should now have some ideas on areas to explore and skills to develop to enhance your tech stack, strategically align it with your organization, and develop both your team and your own career in revenue operations. As you already know, there aren't any

We hope you've found value in this professional guide and wish you the best in your operations career. Thanks for reading.



# Do more faster!

Integrate your web stack,  
automate your processes,  
and **start innovating today.**





## About this Guide

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