

# Geared for growth

How ambitious businesses are using the Revenue Operations model to gain rapid market advantage



## Executive summary:

# Why and how to gear for growth with RevOps

Revenue Operations (RevOps) is a powerful model for rapid revenue growth. But because ‘every organisation has its own constraints’, there isn’t a one-size-fits-all approach. Instead, we focus on how organisations can determine the best way to allow the functions that revenue ops covers to bring sales, marketing, customer success and finance together in alignment, supported by shared objectives, data, processes and technology, in a revenue-focused culture and organisation.

RevOps embeds collaboration by unifying data, measures and dashboards and applying common goals and incentives. It guides a cross-functional team to work together in a continuous cycle, sharing accountability for revenue generation, maintenance and growth. The ultimate goal is to move prospects through the pipeline faster and increase customer loyalty through enhanced customer experiences, thereby making them into advocates and improving their lifetime value.

In long term planning, accuracy and predictability are key. In a traditional commercial operations approach, organisations work with a sales plan, a marketing plan, a customer success plan and a finance plan. RevOps aligns all these at a granular as well as strategic level. It breaks down silos to deliver transparency, accountability, and simplicity. Teams move as one, so they can respond fast and effectively to resolve issues and seize opportunities.

Cloud-based data and apps create a secure and scalable foundation for RevOps. Organisations need accessible, integrated technology and insight to support a truly collaborative RevOps culture, so everyone can share the same view of customers and take responsibility for their experiences and purchasing, rather than handing them off through a series of teams and functions.

Xpedition is leading the RevOps charge, combining our commercial and investment sector expertise in growth organisations, our digital transformation vision and our Microsoft business applications expertise. Using a systematic framework based on Xpedition’s own processes plus recommendations from a variety of leading strategic industry think tanks including Boston Consulting Group and Forrester, we’re guiding ambitious businesses to plan and realise the benefits of a RevOps transformation for accelerated growth.

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# Introduction

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Revenue Operations (RevOps) is a way of aligning business areas, embedding a shared focus on maximising revenue through active collaboration. A single team embraces sales, marketing and customer service. Finance may also be included, depending on the size and sophistication of the organisation. It integrates behind-the-scenes work such as collecting data and using it to inform decision-making across the organisation. The RevOps team acts as a central point for customer acquisition, the customer journey and ultimately, customer success.

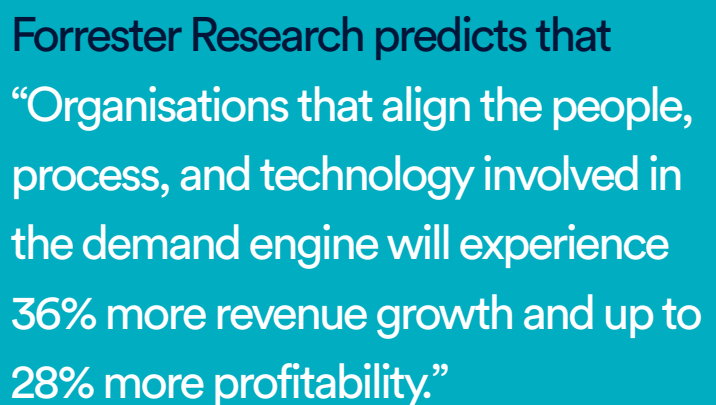


Gartner predicts  
75% of the highest  
growth companies in  
the world will deploy  
a RevOps model by  
2025 .

RevOps is a hot topic for leaders of ambitious firms, not just because of Gartner's arresting prediction of its future impact. It's a tangible way to achieve a priority goal for successful businesses: driving efficiencies and creating synergy and focus on shared revenue goals in all departments that affect revenue growth. In a RevOps model, the efforts of specialists in different business functions can be applied more efficiently and effectively by connecting them to a single, shared outlook on customer activity in context of revenue.

Implementing RevOps effectively can deliver exceptional results rapidly. But it's not for everyone – there are dependencies to satisfy. To reap the rewards of RevOps, organisations need strong leadership and a culture that's ready to embrace transformation.

In this paper, we discuss how RevOps differs from a traditional Sales Operations approach and how organisations can determine whether they are prepared and motivated to put the foundations in place to deploy a high-growth RevOps model for market advantage.



Forrester Research predicts that  
“Organisations that align the people,  
process, and technology involved in  
the demand engine will experience  
36% more revenue growth and up to  
28% more profitability.”

<https://www.gartner.com/en/newsroom/press-releases/2021-05-17-gartner-predicts-75--of-the-highest-growth-companies-#:~:text=By%202025%2C%2075%25%20of%20the,to%20support%20this%20RevOps%20imperative.>

<https://www.forrester.com/blogs/emerging-company-sales-leaders-shape-shift-or-face-failure/>



## Why change?

# What's wrong with traditional marketing and commercial operations models?

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A traditional sales operations approach has recognisable value because it provides structure by applying a system to selling.

Sales operations establishes functional units, roles, activities, and processes that support your sales team. They deliver both tactical and strategic outputs, from compensation and incentive plans, territory structuring and alignment to lead management, process optimisation and sales technology.

That means that reps are empowered to focus on selling more, so they can grow revenue and achieve better results against company targets.

## So what's the problem?

Sales operations has an Achilles heel, because it's a siloed system that focuses strictly on converting customers through a function-specific sales process.

RevOps is more powerful, because it's inclusive and collaborative. It unites the functions, roles and responsibilities of sales, marketing, customer success (client management) and – potentially – finance. They apply their collective might to address shared challenges and opportunities, with far greater impact.

In traditional sales operations, small issues can escalate and evade resolution, because contributory systems and processes in different functions aren't aligned or connected. In RevOps, different operations are actively working together. They have the perspective, shared knowledge and motivation to understand and resolve issues and to identify and grasp opportunities as they arise.

The RevOps approach asserts equal accountability for revenue and customer growth amongst all of its contributing functions. Once the RevOps function is established, the organisation might appoint a Chief Revenue Officer, who reports directly into the organisation's senior leadership. That means there's no deference to one dominant function, such as sales or finance.



# Gains and growth from RevOps: the rewards of streamlining and aligning your most powerful teams

Of course, savvy business leaders already know that the core functions in their organisations need to work towards the same overall goals. That's why well-managed companies have missions, objectives and plans that are agreed, shared and cascaded to every division.

The theory is good, but working in departmental silos dilutes the effect in practice. Each function sets its own specific actions, measures and targets to contribute to overall business goals. They're not necessarily harmonised, timed or prioritised to mesh with the projects and activities of other intrinsically related functions. Divisions and specialist teams tend to be bad at continuously sharing and communicating data and opportunities with others outside.

## With a RevOps team and approach, you get:

### Transparency and accountability

With common goals and incentives for marketing, sales, customer success and finance, breaking down information silos becomes a positive and necessary activity for everyone. By combining these functions under one umbrella, effective leaders can build a culture of collaboration.

With RevOps, the focus is on creating a shared reality using common metrics, definitions and purposes, so every party is working from a single point of truth. RevOps breaks down barriers by mapping and aligning the hand-off points between all parties. This opens up visibility of what each party is doing and shows how members of all functions are collectively accountable for revenue attainment.

Instead of different teams trying to piece together function-specific reports, RevOps teams approach data in a unified way. They take a holistic view of all the data so they can see blockages and missed opportunities that are impacting revenue and take collegiate action to accelerate revenue growth.

### Accuracy and predictability

More accurate long-term planning is a key advantage of RevOps. Traditionally, organisations end up with a sales plan, a marketing plan, a customer success plan and a finance plan. RevOps delivers a single plan that encompasses all these in harmony.

RevOps makes it easier for teams to identify key data points that influence the next set of actions and help to predict pipeline growth more accurately. In contrast, the traditional approach of pulling together siloed information builds subjectivity into forecasting, because different teams are analysing different metrics and will likely come to different conclusions about what works and what doesn't.

In fast-changing and competitive environments, with a RevOps approach it's easier to achieve maximum impact when you need to adapt and refine programmes in-flight, because people across all functions are acting as one.

### Simplicity

A purposeful RevOps team supported with the right tools and consolidated data can use one dashboard and one set of indicators to help improve close rates, LTV and the overall customer experience. Working together, they can identify blockers and unite their specialist skills and experience to fix them together.

Working together towards shared goals means managers spend less time debating challenges and battling over the perceived status and value of competing activities. They focus collectively on building revenue through their best combined efforts. RevOps empowers a streamlined team to accelerate deal cycles by reducing friction and improving cross-functional processes.

### Enhanced customer experiences

When separate entities are responsible for marketing, pre-sales, sales and support, they don't always communicate fluently or use the same common language. With RevOps, everyone's on the same page and communication is consistent. There's smooth and seamless engagement with customers, built around one unified message.

In competitive markets where customers have more choice than ever before, seamless experiences count. RevOps brings together resources from marketing, sales, customer success, finance and operations behind every touchpoint, making the customer experience human and effortless.

Because functions are working closely together, they're attuned to the same customer needs and can act as one to resolve issues and refine processes. Customers feel heard throughout the company, which improves their loyalty and propensity to revisit and spend more.



# RevOps prerequisites: success depends on strong data

To unlock the full value of the RevOps approach, organisations must have a strong data strategy and implement processes that democratise and integrate data across the organisation.

If there's a siloed culture entrenched in your business, as a senior leader you'll need conviction and persistence to persuade your teams of the value to them and to the whole enterprise of sharing and pooling data transparently, rather than guarding it.

## Data strategy

A robust data strategy promotes enhanced data governance and data literacy, data sovereignty and compliance as well as improved operational resilience and agility. It connects to overall business strategy and covers short-term wins as well as long-term goals.

If you don't design and implement a strategy that defines how data is used and shared throughout the business, you'll reduce or even negate the value that a RevOps team can generate.

Data governance is particularly important, encompassing data quality, security, privacy and ownership. Because data provides the building blocks of a collaborative, rational RevOps approach to improving business performance, it's vital that your data is accurate, well managed and secure.

One of the most crucial data governance issues for RevOps is how to ensure the open use of data across your business. This principle of data sharing needs to be understood, supported and enacted by all parties in your RevOps function.

## Start point: a single source of truth

To develop a high performing RevOps force, all your data needs to be integrated into a single data platform. This becomes the single source of truth for decision-making, providing the team with an unbiased 360 view of your business.

Trying to extract meaningful insights from disparate legacy data systems is frustrating and slows down your responsiveness to customer issues and opportunities. Grappling with multiple data sources repeatedly wastes time and resources.

If your data isn't yet fully integrated into a single data platform, this is a key step before initiating a RevOps approach. To provide cutting edge security, access to innovative technology applications and remote access, moving data to the cloud should be a priority.

In our view, the Microsoft Azure cloud is the best option in the market to support your transformation to a high performance, data-driven RevOps organisation. Using the power of Microsoft Azure and Power BI, you can bring together and transform all your data into actionable insights that will fuel revenue and business growth.

## Democratise access to data

When you create a data-driven RevOps culture, data becomes an asset available to every team member at every level. That makes it easy for routine decision making to be evidence-led, rather than subjective.

By sharing data more effectively, your RevOps-led business will be positioned to make faster, more informed decisions and build stronger partnerships that give you a competitive edge.

Microsoft's Azure cloud platform is designed to democratise access to data. It brings together disparate data for deeper insights, allowing colleagues to share a holistic view of the business. PowerBI gives the RevOps team advanced, interactive visualisations that support data-led decision-making.

## Standardised metrics and a common data language

Once your data strategy and unified database are in place, the next challenge is to standardise reporting and to create a common data language across the business.

If different RevOps functions are using contradictory terminology to define data insights, even if they're pulling from the same source, you'll lose clarity and focus. A data-driven culture is propelled by clear and consistent language. That means everyone in the business at every level can understand which data metrics are important and can talk about them in a way that's universally understood.

As well as implementing enabling technology, to democratise access to data you'll need an active plan to maintain data literacy among your workforce.



# Embedding RevOps: how to plan and build a function with maximum impact

Gartner's Craig Rosenberg characterised RevOps as “the modern operating model for fast-forward organizations.”

## Applying RevOps – steps to success

The benefits of RevOps are compelling for business leaders or investors who seek to accelerate growth and drive revenue performance in an organisation. Putting the model into practice requires a systematic and thorough approach that starts from the top of the organisation.

Where you begin will depend on the maturity of your organisation. Understanding where you are today and identifying the most pressing priorities will determine where you apply most focus, as you establish your RevOps culture and model.

Assign a leader who will be accountable for revenue growth and acceleration in the aligned RevOps marketing, sales, customer service (or client management, or customer success) and finance forecasting team. Some organisations are adopting the relatively new job title of Chief Revenue Officer or Director. The leader must be able to establish credibility, trust and motivation between the constituent teams.

To gear for success, we recommend working through six organising elements to address every key element of your organisation, processes and resources.



### Strategy

Make a plan that aligns with your revenue objectives, so you can organise and mobilise your revenue functions behind a single, clear mission.

### Process

Design, manage and track an end-to-end process for revenue creation. This clearly identifies touchpoints, decisions, resources and interactions that contribute to a purchase decision – from initial awareness through to signing the contract and delivering the product or service.

### Data

To manage and optimise the end-to-end revenue process, you need a single source of complete and universally available data, with accessible reporting and dashboards.

### Analysis

Agree the activities and metrics you'll use to monitor and measure performance and progress across the whole revenue life cycle. These will reveal the weaknesses and opportunities that your integrated RevOps team can investigate and act on quickly, using the might of its combined force and expertise.

### Technology

To make the RevOps model work, you need technology solutions and architecture that connect data, streamline processes and manage workflow. Powerful and agile technology helps you plan and communicate better, deliver more personalised and relevant engagement and involve the right people at the right time, equipped with all the context and information they need.



# What makes for a successful RevOps approach?

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## People

Before even thinking about technology, organisations need to consider the impact of aligning sales, marketing, customer success and finance. Leaders from the respective divisions will be responsible for leading the change and achieving buy-in. This can be the most challenging part of a RevOps transformation – it's a paradigm shift that overturns years of ingrained belief about how functions collaborate to drive revenue. Sell the RevOps vision to the team from the very beginning, consulting and listening to questions and concerns.

## Technology

Internal technology and data silos need to be broken down, for the best possible chance of sharing easily accessible intelligence and insights. Make sure you truly understand the internal user experience: it's regrettably common for organisations implement new technology at great cost, without first asking for feedback and user stories. Get these from discovery activities, such as design thinking workshops and day-in-life-sessions. Then you can assess your existing technology stack, to identify efficiencies and to bring your data together to provide a single source of truth.

## Processes

The RevOps team needs to understand the why and how of their new approach. A great vision and innovative technology don't mean anything if the team members don't know how they're meant to work together to meet RevOps goals. So it's important that processes like KPIs, reporting formats, meeting cadences, operating procedures and training are all agreed. Otherwise there's a risk your team will revert to previous practices and silos, missing revenue targets and losing out on customer experience improvements.





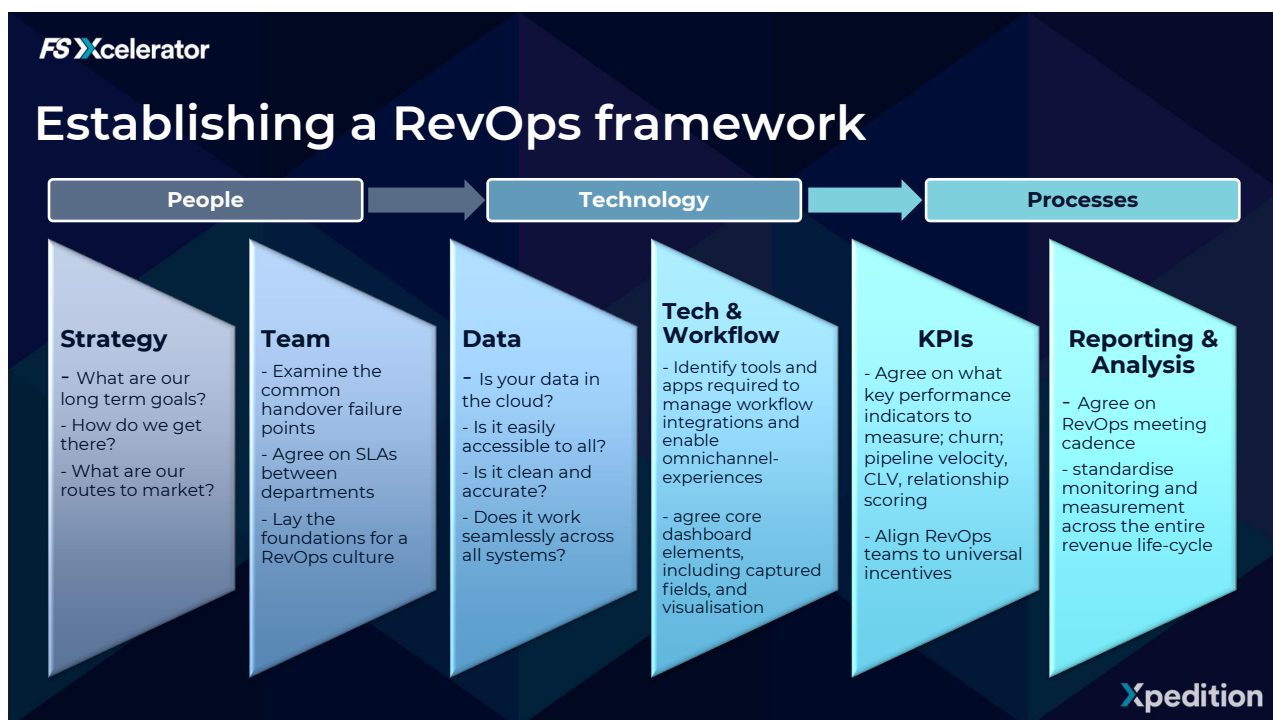
# Conclusion: adopt early and launch effectively with Xpedition

With a long track record working with ambitious organisations and private equity investors, at Xpedition we're constantly alert to new approaches and technologies with the potential to accelerate business growth.

RevOps is gaining traction, but it's not ubiquitous. Many organisations lack the confidence and knowledge to combine a data-led transformation with cross-functional and process alignment behind shared revenue accountability.

To us, it's clear that RevOps offers a game-changing opportunity for outperformance and revenue optimisation, for organisations who are bold and focused enough to take it. That's why we've developed and tested a RevOps framework based on key principles proposed by leading consultancies and revenue growth experts. It's designed to move businesses quickly and effectively through a process of discovery, transformation and deployment across people, technology and processes.

Our client consultancy experience and our status as a Microsoft Gold Partner position us uniquely to partner with businesses who want to adopt RevOps early for revenue growth and market advantage.



Is your organisation or portfolio business ambitious to achieve growth through rapid revenue optimisation?

If you'd like to access the advantages of RevOps for your business, book a Discovery meeting with an Xpedition RevOps expert today.



To learn more about Xpedition, visit:

[xpedition.co.uk](https://xpedition.co.uk)

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For over 20 years, our team has empowered organisations to thrive through innovative thinking and transformative technologies that enable long-term success.

Our dedicated experts are constant innovators who always put our clients needs first. We are never afraid to respectfully challenge thinking, to achieve the best creative solutions, that we know will deliver better business outcomes for you. We seek to deliver every project with passion and above all, act with integrity.

Underpinned by the power of Microsoft Dynamics 365, Microsoft Azure and disruptive technologies such as AI and advanced analytics, Xpedition will help you strengthen operational resilience, improve agility, unlock the power of your data, surpass client expectations, and ensure business continuity in even the most challenging environments.

