Category

Commercial Excellence

Revenue Operations (RevOps) Design & Implementation Playbook

Unifying sales, marketing, and customer success operations around one revenue process, not three

- Executive
- Advanced
- Template Included

- Administrator
- 28 January 2022
- 3 minute(s)

Overview

A framework for designing and implementing revenue operations (RevOps) — unifying sales, marketing, and customer success operations, data, and processes around a single revenue funnel view — avoiding the common failure mode of siloed functional operations teams optimizing locally at the expense of overall revenue process coherence.

How is RevOps genuinely different from having separate sales

operations, marketing operations, and customer success operations teams? Separate functional operations teams each optimize their own domain, often using different data definitions and processes, producing fragmented handoffs and inconsistent metrics across

the funnel — RevOps unifies these around a single revenue process view, data model, and metric framework spanning the full customer lifecycle.

What's the biggest implementation challenge organizations face when

consolidating into RevOps? Reconciling different data definitions and process assumptions each previously separate functional operations team had developed independently — this reconciliation work is often more significant than the organizational restructuring itself.

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