



Ultimate Guide to Powering Your RevOps Strategy

Align marketing, sales, and customer
success functions to create a frictionless
revenue-generating machine.

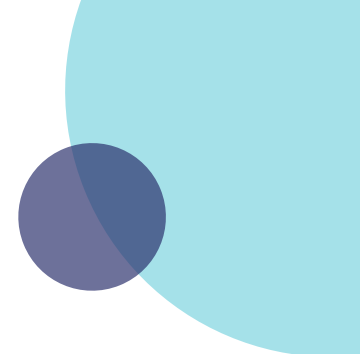
www.newpathdigital.com



Powering Your RevOps Strategy

Create a frictionless revenue-generating machine through Revenue Operations.

About New Path Digital



We are an innovative digital marketing agency with a strong balance of traditional media advertising. Our passion is discovering and creating meaningful connections with measurable outcomes.

While we are a digital-first agency, we value and understand the importance of traditional media. As a result, we continuously work to enhance and blend the combined impact of each media type, across all available delivery channels.

Our Mission

To remove friction between forward-thinking businesses and their implementation of modern marketing and advertising systems.

What We Do

We develop and execute consumer-focused marketing and advertising strategies that influence consumer purchase decisions.

We specialize in the development of “path-to-purchase” models that learn, adapt, and increase the effectiveness of our client’s marketing and advertising investments.

How We Do It

We excel at what we do by staying true to three fundamental principles:

- Understand our client's business and help them identify and focus on their most valuable customers.
- Educate and Invest in ourselves, our stakeholders, and in tools and technology to stay on the leading edge as our industry continues to evolve.
- Challenge the way we reach and communicate with consumers.

We execute around 4 pillars of services:

- [people-first marketing](#)
- [tech-forward development](#)
- [ai-assisted advertising](#)
- [data-driven decisions](#)

Technology is evolving faster than humans can possibly adopt it. Our pathfinder™ process was designed to provide businesses with a customized map to digital maturity.

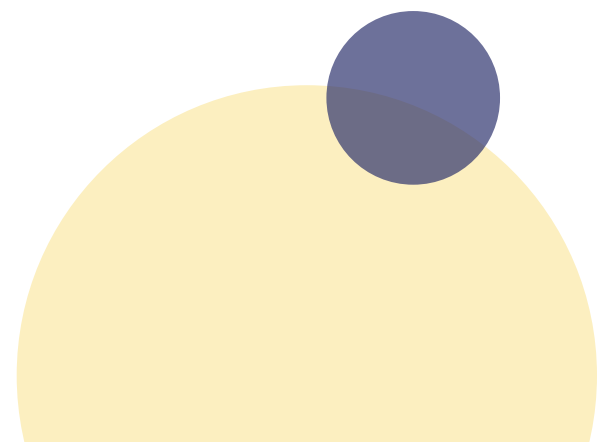


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Overview of RevOps

What is RevOps?

Revenue operations (or RevOps) better align Marketing, Sales, and Customer Success functions to encourage better revenue growth across an organization.

It's a framework to connect your technology, processes, and strategy and create a frictionless revenue-generating machine while delighting your customer at every stage.

Traditionally, due to the nature of trying to build a successful company in ‘real-time’, businesses have been a collection of interconnected but disparate departments. Yes, they all have the same goal (the company’s ultimate success), but they also have their own needs and constraints. Likewise, the larger they get, each department also has its own ‘Head of’, Vice President, or Director with a unique approach.

For example, in most organizations, sales operations report to the Head of Sales, marketing operations report to the Head of Marketing, and Customer Success to, well, you get the idea.

Each team has its own set of goals, tools, and priorities. And, for the most part, it works. But the challenge with this way of working is that disparate systems mean friction points where sales conversions are potentially lost for a variety of reasons.

Through better collaboration and visibility, RevOps looks to close the numerous and various gaps across people, data, processes, technology, and team accountability through improved



operational efficiency. This will drive a more cohesive business by unifying teams through shared goals and by sharing information.

Picture an orchestra: a collection of individuals who all need to work in unison to achieve a result - a pleasant melody. Can you imagine every chair playing their own tune, in their own time at their own volume? That's most organizations. But RevOps (much like an orchestral conductor) unites disparate business functions, to get them working in unison to achieve a collective result more powerful than their collective parts.

So, how do we get to this Utopian state of optimal growth?

Short answer, it's not easy and requires an in-depth examination of your entire business, focusing on the good, the bad, and the downright ugly. But the improved financial results are well worth the effort.

Growth of RevOps

Since 2019, there's been a 300% increase in RevOps-related roles on LinkedIn and a 57% increase in companies implementing RevOps strategies or building RevOps teams.



According to a [recent HubSpot blog](#), companies that implement RevOps have seen the following impact:

- **10-20%** increase in sales productivity
- **15%** increase in profitability
- **19%** increase in speed of growth
- **71%** improvement in stock performance
- **100-200%** increase in digital marketing ROI

Impressive, right? But what if the system is working well and delivering the results we hear you say? Well, if it ain't broke, don't fix it. Right?

Not quite. [According to HubSpot](#), 60% of current operations professionals end up repeating or double handling business tasks due to a lack of team alignment. This means targets get missed, goals aren't reached and stakeholders across the board get frustrated. It's a lose/lose for everybody.

But once you get the orchestra all playing the same song, your business will thrive.



The Origin of RevOps

In most business deals, the greatest revenue is often achieved after the point of sale. I.e., delighting customers through a range of appropriate cross-selling, up-selling, and re-selling opportunities after the initial conversion.

To provide this type of customer-first experience, you'll need to spend some cash upfront. But the money you'll likely spend to secure a customer (or the cost of acquisition) is only a small fraction of what you can expect to earn from them throughout their customer lifecycle.

Once you recognize and accept this shift in customer focus, you'll be able to shift your energy

towards fostering customer loyalty and driving more revenue.

These are the 6 main ways SaaS has altered relationships between customers and the businesses they buy from:

1. Most revenue is achieved after the point-of-sale.
2. Traditional funnels are dead, and now customer journeys are non-linear.
3. Customers now have thousands of options at their fingertips.
4. Customers now consistently demand a more personal, frictionless experience.
5. There are typically more stakeholders involved in a purchase decision.
6. The rate of change is ever increasing.

Benefits of RevOps

The 5 Main Benefits of RevOps

From	To
1. Time wasted comparing info	Data-driven decision-making and better collaboration
2. Tension created in hand-offs with “it’s not me, it’s them” attitude	Complete visibility and accountability across all teams
3. Individual reports and processes	Single source of truth shared by everyone
4. Subjective forecasting and many “make or break” months	More consistent and predictable pipeline and business growth
5. Everyone working for themselves in isolation	Better customer experience leading to higher win rates and faster sales cycles

In short, think of these benefits as:

- Making better decisions faster
- Getting the right data in hand to make those decisions
- Building trust and predictable pipeline

But selling a fresh idea as bold as RevOps to skeptical colleagues or a resistant board isn't easy. Change can be hard work and a 'No' is always easier to get than a 'Yes' when it comes to asking for extra budgets for fundamental business change.

With is in mind, there are two key points you should try and remember to communicate when approaching your go-to-market teams with the idea of RevOps:

- 1. How having a codified, replicable process will help deals close faster
- 2. How RevOps will help the organization build a consistent approach to scaling

Before RevOps

Maketing Ops	Sales Ops	Customer Service Ops
Data	Data	Data
Technology	Technology	Technology
Process	Process	Process

Historically, most organizations separate their Marketing, Sales, and Customer Success departments as per the diagram above. But as you can see, this often leads to siloed data sets, tech stacks, and processes.

And the issue isn't just the siloing of data. It also creates at least three clear friction points for the customer as they pass from one function to the other as they move through the sales process. Now let's explore the same journey from a RevOps position:

After RevOps

Maketing Ops	Sales Ops	Customer Service Ops
RevOps		
Data		
Technology		
Process		

As you can see, once RevOps is at play in the go-to-market arm of a business, it's easier to recognize sales, marketing, and customer success as a single function with a clear alignment between data, technology, and processes.



Existing Roles and Responsibilities

VP of Marketing		VP of Sales		VP of Customer Success	
Demand Gen	Marketing Ops	Sales Staff	Sales Ops	Customer Support	Customer Ops
Product Marketing	Marketing Tools	Sales Process Management	Sales Tools	Customer Success Managers	Customer Tools
Corp Comms	Business Analyst	Lead Management	Sales Enablement	Professional Services	Customer Marketing

Now let’s see how Marketing, Sales & Customer Service can be better connected through RevOps.

RevOps Model

VP of Marketing		VP of Sales		VP of Customer Success	
Demand Gen	Marketing Ops	Sales Staff	Sales Ops	Customer Support	Customer Ops
Product Marketing	Marketing Tools	Sales Process Management	Sales Tools	Customer Success Managers	Customer Tools
Corp Comms	Business Analyst	Lead Management	Sales Enablement	Professional Services	Customer Marketing
VP of RevOps					
Operations Alignment	Customer Journey Alignment	Tool Alignment	Data Alignment	Insights Management	Unified Reporting

It’s important to note RevOps doesn’t sit above or below the existing VPs of Sales, Marketing, or Customer Success. The role acts as a unifying entity to ensure the tools and processes of each are best aligned for maximum results.

By having an overview of all depts, RevOps can spot and fix the numerous friction and drop-off points that siloed growth functions often have.

Foundations of RevOps

If you take anything from this guide, let it be the following pillars:

Pillar	Summary
Data	Data health, data infrastructure, data administration, data stewardship
Customer processes	Customer journey, sales process, segmentation, QBRs, renewal, expansion
KPIs and reporting	KPIs, business development, pipeline management, forecasting, account retention, account expansion, sales performance
Tech stack	Evaluation, acquisition, administration, integration, utilization
Training	Personal development, training, coaching, onboarding
Strategic insight and planning	Goal setting, target accounts, revenue opportunities (analyze “best deals” and market)

Key performance indicators (KPIs) for RevOps

There are several key performance indicators (KPIs) to pay attention to when it comes to RevOps. When you’re building out your RevOps function, the three main things to evaluate are:

- Customer churn
- Revenue per employee
- Account relationship score

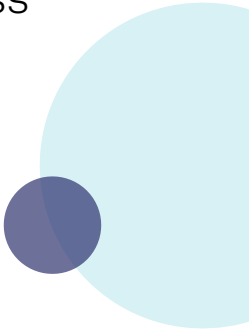
Useful Areas for RevOps to Measure:

Cost of Customer Acquisition	MRR/ARR	Renewals	Upsells/ Cross-Sells	Customer Churn
LTV	Forecast Accuracy	Pipeline Velocity	Sales Cycle	Win Rate
Lead Relationship Score	Opportunity Relationship Score	Account Relationship Score	NPS	Revenue Per Employee

As should hopefully be clear, RevOps is about maximizing the efficiency of your Marketing Sales and Customer Service functions by better aligning tools and processes to reduce conversion friction and delight the customer at every stage.

Without getting into too much detail, each of the indicators above tells a story about your customer journey. They're all data points with which a savvy RevOps practitioner can better understand how to improve the customer journey and reduce friction.

- Pipeline velocity too slow? You might need to reduce friction in your quote send and sign-off process.
- Poor renewal rate? Customer Success may need to share upsell data with Sales earlier in the process.
- NPS score low? Maybe customers need delighting earlier in the sales process.



Of course, these are only three example suggestions but they highlight how data points are more than numerical information; they're insights into where the customer journey can be improved by better aligning how a business interacts with a customer.

Incremental Gains in RevOps

Long story short, you don't want to underestimate the value of a well-oiled revenue engine.

Here's why:

Marginal Gains Over Time					
Leads	Conversion Rate	Conversion Rate	Win Rate	ACV	ARR
100	0.3	0.2	0.2	\$10,000	\$12,000
100	0.35	0.24	0.25	\$12,000	\$25,200

Once your RevOps strategy and practical applications are up and running, you'll start to see the fruits of your labor. But don't be surprised or discouraged if you don't see results right away. It's going to take time for people on your team to adjust to this new way of operating.

Onboarding and implementing are both short-term pains that will result in long-term gains. Think about the bigger picture and be willing to put in the

work overtime. The real key to success with RevOps? Easy - it's just getting started. The sooner you start, the sooner you can improve your processes, and then sooner you can see results.

Building a Revenue Model

How to Build a Revenue Machine with HubSpot

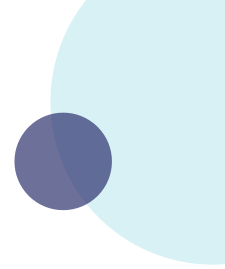
Marketing		Sales		Customer Success	
RevOps					
Step 1	Step 2	Step 3	Step 4	Step 5	Step 6
Awareness	Consideration	Decision	Onboarding	Retention	Expansion



1) Align teams & map the customer journey

Before a lead even enters your CRM, it's important to condition all three departments (Marketing / Sales / Customer Service) so they fully understand how and why a RevOps approach works.

By knowing exactly where, when, and how customer handovers will occur and intersect as the prospect moves through your sales cycle,



you can reduce friction, speed up onboarding and ensure the customer's, not the organization's needs, are the number one priority at all times.

2) Map the customer journey and Ideal Customer Profile (ICP).

With a clear understanding of expectations, it's now time to step into the customer's shoes.


Create a process diagram and map every stage your customer goes through as they move through your sales process - from the first time they encounter your brand messaging to the moment they sign their one-year renewal.

It may seem excessive, but it's a powerful insight into where and when marketing, sales,

and customer service can often compete for the customer's attention to satisfy their own departmental needs.

For example, why make a customer repeat information when it can be collected and shared at a single point? What used to be the responsibility of the Customer Service team can now be captured during the fact-finding call by the sales team. The information Sales historically needed can instead be captured by Marketing to allow for a smoother handover from MQL to SQL.

Get into detail and start working on this before the first meeting happens. Make sure everyone is on the same page with who your go-to-market teams should be targeting, what their common pain points are, what their typical



business goals are, and how your product or service offering is going to solve their problems.

If there's a clear picture of the results your organization can provide to customers, it's a lot easier for go-to-market teams to center these conversations around current and future customers, and tell a compelling story that gets them in the door, and keeps them loyal to your organization. If you're able to show the value effectively, it'll be hard for them to picture life without your product or service

3) Process and data for key stages.

Ensure your team members are given access to data at the right time to reduce and standardize the sales cycle. One way to think about the key stages is to follow

HubSpot's lead; awareness, consideration, decision. Going about your RevOps process in these stages is a great way to put your team in the same mindset as your potential customer. As consumers themselves, it probably won't be a hard concept to get across.

Think of the "awareness" stage as the first impression your organization makes on the customer. They could be coming across your website for the first time, and digging around before as they make their shortlist of vendors to consider. What does your first impression look like right now? Is it a good one? Make sure that it is.

The "consideration" stage is when the customer is weighing all of their options. They're thinking about things like pricing, onboarding,

ease of use, and even your company's values. Like your first impression, there is also a secondary impression stage, and sometimes the decision can be emotional. With this in mind, arm your go-to-market team members with the tools and resources they need to be successful in continuing the conversation. Don't set them up for failure.

Lastly, the "decision" stage is when the customer in question decides which product or service is the best fit. By the time they get here, they should have all of the information they need to make the right decision for them. Ensure that you have everything in place for this to happen before they reach the decision portion of their buyer's journey.



4) Measure and identify where to improve when it comes to speed and conversion.

Keep in mind that incremental improvements can have exponential results. As we like to say, slow progress is still progress. As you go down the road of RevOps, don't be shy about iterating on your current process and getting rid of the fluff that isn't actually helping your team or your business. If you can cut your tech stack, do it. If you need new documentation or templates for your sales team, get them created. No matter the changes you make, as long as they promote efficiency and unity in your team, you've likely made the right decision.

5) Bring tools that deliver insights faster or serve as force multipliers.

Make sure that whoever's leading the charge with RevOps also puts a focus on getting the right tools from the right vendors (like HubSpot). Sure, the process of evaluating and implementing new technology is daunting, and it's certainly not appealing when you have to consider the skepticism of some people on your team. However, if you have someone that's dedicated to choosing tools that will actually create efficiencies (and probably result in more money made), it'll be easier to push the agenda for technology adoption along.

You don't have to start your tech stack from scratch, either, but

make sure that you're being objective in evaluating what tools you already have. If they're not helpful to your team or your business, let them go. The tools you choose will depend on the maturity of your business, therefore it is inevitable your tech stack will develop over time. In the short term, select tools which provide the most value to your teams and enable them to deliver greater results.

With your CRM as the foundation, consider software that provides increased visibility of your pipeline across sales. This can include revenue intelligence platforms like Ebsta and Drift, or marketing platforms like HubSpot.

6) Build feedback loops for rapid knowledge sharing and optimization.

Make sure everyone in your go-to-market “orchestra” is on the same page of the “song.” Don't let the fear of shifting gears or making changes stand in your way, either. As you go about implementing your RevOps strategy within your organization, be sure to encourage openness and transparency within your team. What does transparency look like?



In this case, prompt people to give feedback on how the process is going in real-time. Of course, you may not be able to act on every change suggested, but the sooner these things come to light, the sooner they can be acted on and optimized for success in the short and long term.

7 Common RevOps Challenges

RevOps is a powerful way to drive more revenue through your business, but as a relatively new operational concept, there are a few potential difficulties you need to keep in mind:

1. Lack of buy-in from business leaders	Pinpoint on what grounds stakeholders object. Does the board object on financial, operational, or cultural grounds? Do stakeholders feel threatened by change? Only with a clear objection can you structure a data-driven, logical response.
2. Lack of alignment on the customer journey	Before implementing a RevOps program, take time to do the hard yards and ensure basic customer journey improvements can even be made.
3. Lack of internal expertise or ownership	A sure-fire path to failure is no one person has the skills or time required to scope, implement, and monitor the project. As soon as you know it can be done, start to map who exactly is going to drive the idea on a macro and micro level.

4. Lack of budget	Funding is hard to come by in any business. So before you ask, ensure you've built a strong, data-driven business case for RevOps.
5. Lack of buy-in from business leaders	Pinpoint on what grounds stakeholders object. Does the board object on financial, operational, or cultural grounds? Do stakeholders feel threatened by change? Only with a clear objection can you structure a data-driven, logical response.
6. Too much technology	Most businesses use more tech than they need. A robust tech audit will give you a clear idea of the technical landscape so you can avoid any tech-based logistical nightmares.
7. Lack of process/resources	Have you got the internal resources required to restructure? As with any project, ensure you have the right pieces on the board before making a move.
Papering over the cracks	If you start a RevOps function without fixing any of the above points, you're going to run into problems later down the line. Fix it early and fix it once if you're serious about RevOps success

RevOps FAQs

Q: What does a RevOps team look like and how does it scale with company size? What skills are needed? And how do you get started building a RevOps team?

A: Different teams are going to need different resources. Start with a leader; get someone who has experience in this area. Be brave, as no one has all the answers as to what they're hoping to achieve with RevOps. RevOps is not an admin function, but strategic.

Q: Is the VP of RevOps the same as a CRO?

A: No, CRO should instead be working alongside the VP of Revenue Operations. People in RevOps don't need to be

good at running a sales process themselves. CRO needs to understand the commercial side and drive the business forward. RevOps needs to understand data, processes, and technology that will support GTM teams.

Q: What size of company do you expect to have a separate RevOps team?

A: Depends on the operation and what you're trying to achieve. Smaller, more agile companies, for example, may not have the resources to hire multiple roles in a RevOps team framework; however, they can take steps towards overall team alignment by establishing an internal RevOps committee formed by leaders within the different GTM departments.

This way conversations and decisions can be focused around overall company goals, and initiatives can be planned and executed based on shared understanding between teams. Medium to large-sized organizations with more resources available towards growth will want to take steps toward building a dedicated RevOps team and consider widening the mandate to include ownership of business insights, tools and processes, or training and enablement alongside general operational ownership.

Typically, medium-sized businesses will begin by hiring for roles attached to specific teams (Sales Operations, Marketing Operations, etc.) However, it's important to ensure that these roles are moving in lockstep with your internal RevOps committee

to prevent the silos from forming within the business.

Larger organizations, and organizations with more complex needs or hierarchies, will want to hire a Revenue Operations leader or executive to sit alongside the executives of other teams to foster alignment, drive strategic conversations, and own and champion any RevOps-related initiatives across the business.

This may require some internal restructuring, but it is important to bring staff, process, and knowledge together under one operational umbrella that is fully aligned with the wider company goals.

Q: Most GTM teams have siloed tech stacks. How do you best manage the transition given the level of disruption when it comes to ripping and replacing tech?

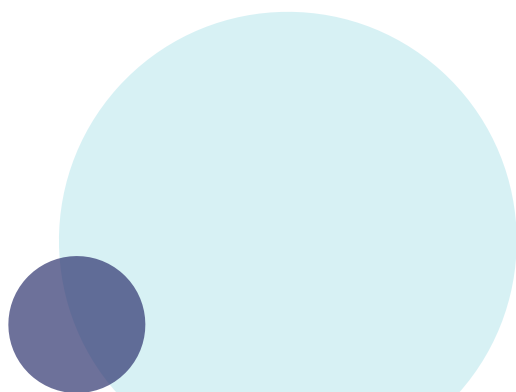
A: It doesn't have to be a rip and replace situation. Start by having one function responsible for all of it. Let the operation be responsible for what they're good at. So many efficiencies can be brought by first getting everyone on the same page. Tiny changes at each stage of the process have exponential growth. We suggest checking out HubSpot's CRM Platform, which can help you consolidate your tech stack and unify your data to a single source of truth.

Q: How is this different from a modern marketing team with a cross-functional growth team targeting improvements at each stage of the customer lifecycle?

A: Focused RevOps function leads to a consistent message all across the organization.

Q: Do you think that every scaleup needs to employ this discipline at the start and then avoid siloed conflict at a later stage?

A: Revenue Operations is a framework to aid in the growth of your business, so the earlier this framework is considered, the easier it will be to align your internal resources, which reduces the friction when the time comes to scale in earnest. The earlier you can



justify, the quicker you can scale. Get the right people in to help you run faster.

Q: Which parts of the existing organization show the most resistance to this approach?

A: Sales is usually the first to push back. With strong management, this can be avoided. The whole point is to generate more efficiency for scale, and more revenue for the organization. Ultimately, sales wants to earn more money.

Even if they grumble, stick with being consistent. Imagine the opportunity. Don't see the shortsighted nature of sales be a deterrent; you want them focused on the next deal.

Q: What skills would a RevOps person need?

A: Think about what they were doing before the term started to gain popularity. It would be people responsible for leading SDR teams, or responsible for GTM tech and getting the word out within an organization. Maybe they haven't had the freedom or recognition to flourish. Look forward to a track record of success whilst fighting against a tide.

Data-minded individuals & strategic or big-picture thinkers who are



comfortable working with different technologies and data sets are excellent candidates for RevOps roles.

People working within teams in specific functions (e.g., sales development) also make for great candidates as they develop deep knowledge of internal processes and areas for potential improvement.

Q: On average, how long would you expect it to take to implement a RevOps strategy?

A: Every organization is different. Even when it's in place, then the cogs need to start moving. Nothing is left to chance in the GTM functions—we have data between our approaches now.



Don't get left. Take the right path.

Let us help you align your Marketing, Sales, and Customer Success functions and bring your business into a more connected future.

The good news; growth is around the bend for those organizations who commit fully to digital transformation. Our pathfinder™ process was designed to provide a customized road map that leads forward-thinking businesses into the future.

Ready to get started?

Schedule a consultation today!

www.newpathdigital.com



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