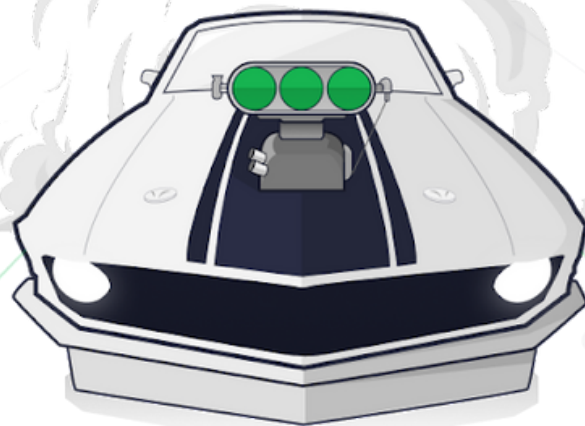


HubSpot + RP Present

The RevOps Manifesto



RevOps Manifesto **Agenda**

- Introduction
- RevOps Manifesto Tenet #1
- Tenet #2
- Tenet #3
- Tenet #4
- Tenet #5
- Tenet #6
- Tenet #7
- Tenet #8
- Application Summary
- Webinar Q+A
- The Ultimate Checklist



RevOps Manifesto

The Problem

The Recognition

RevOps is a competitive differentiator

The Shift

"Should I do RevOps?" to "How do I do it well?"

The Definitions

Too heady; Too theoretical; Too conceptual

RevOps Manifesto

The Solution

A Re-Centering

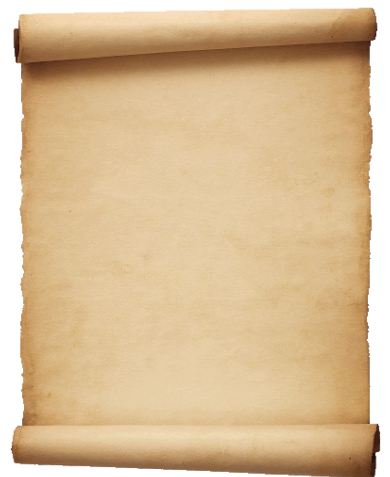
RevOps (Base LVL): Behaviors that create actionable data

A Guide

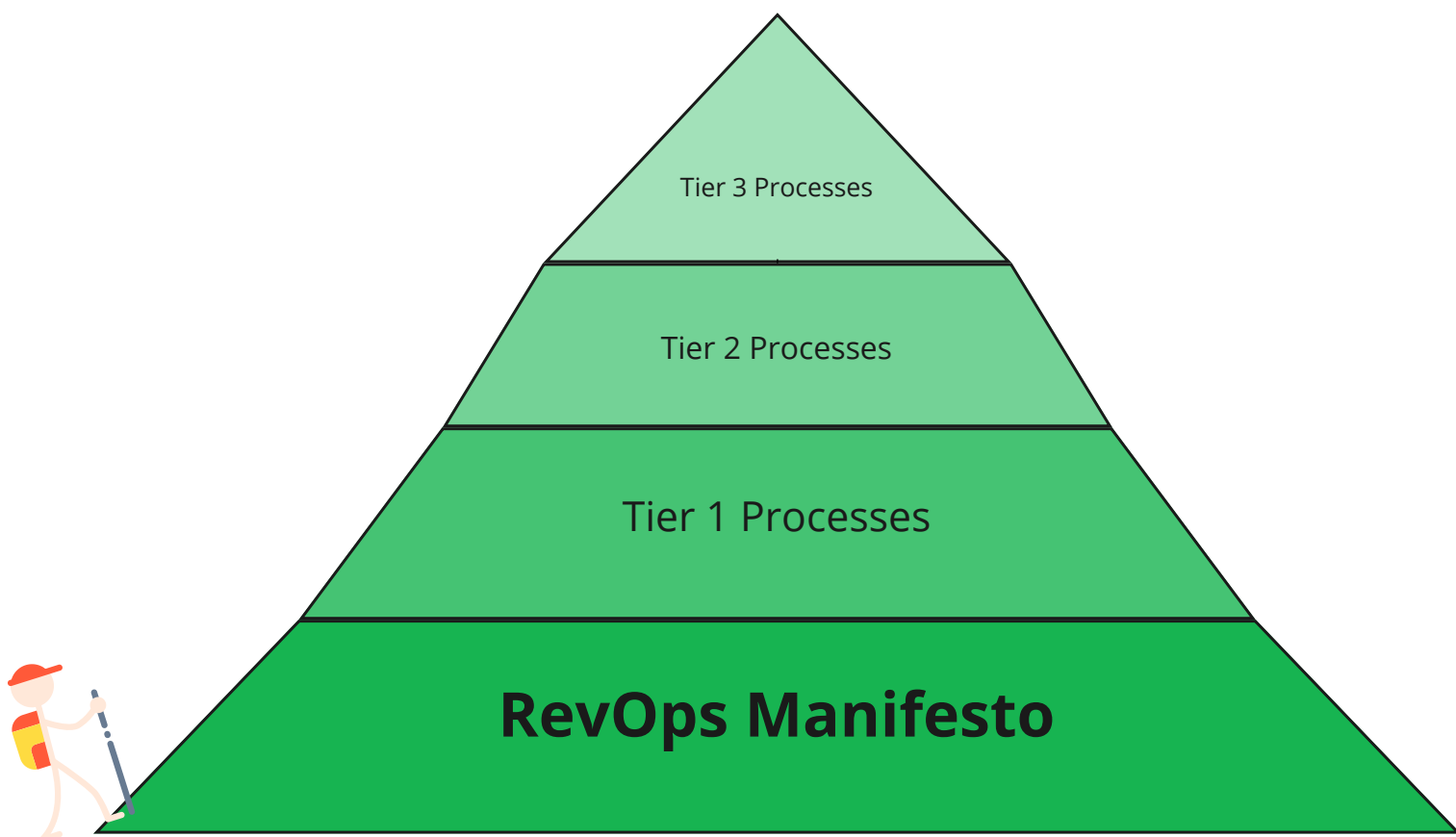
Clear, simple, practical behavior-based tenets

A Layer

Foundational layer of doing RevOps.



The Foundation



Bottom Line: *No process can function well if The Manifesto behaviors are not happening*

The RevOps Manifesto

Tenet I:

I recognize this truth: adoption > process > tool.

Tenet II:

I shall run a weekly sales pipeline call in my CRM.

Tenet III:

I shall manage my sales from a Dashboard in the CRM.

Tenet IV:

I shall decrease the number of "databases" I use.

Tenet V:

I shall draw my processes.

Tenet VI:

I shall measure marketing by revenue.

Tenet VII:

I shall eliminate Excel/Google Sheet.

Tenet VIII:

I shall hire a dedicated RevOps resource.

Tenet I

I recognize this truth: **adoption > process > tool.**

Significance

Adoption: Without adoption -> process does not exist.

Simple: Simple processes are better.

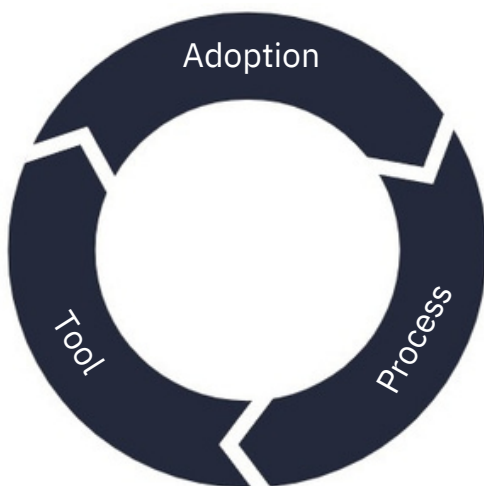
Tools: Tools matter.

Application

Track: Track adoption of tools.

Iterate: Starting a new process / tool is 25% of the journey.

Selection: The most important selection criteria for any tool is "how easy is it to use."



End State: *100% adoption of CRM - all departments*

Tenet II

I shall run a weekly sales pipeline call in my CRM.

Significance

Adoption: Creates patterns and consistency.

Rhythms: Know when the data is "ready" + increase comms.

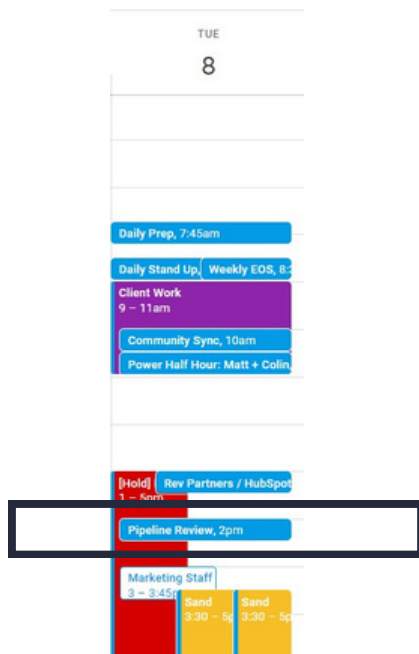
Repetitions: Creates organizational strength.

Application

Schedule: Schedule recurring meeting with sales team.

Never Skip: If VP isn't there to run, someone else does.

Timing: Start this as soon as sales team is >1. Best day is Tuesday.



End State:

Predictable timeline for data integrity in CRM

Tenet III

I shall manage my sales from a Dashboard in the CRM

Significance

Adoption: Inspect what you expect.

Data: Ability to trust your data.

Accountability: Holds reps accountable for data (Close date, contact, forecast category).

Application

Dashboard: Use ONE Dashboard. Use it every time.

Question: Ask the same questions every time.

Rule: If not on this dashboard, then it does not exist.

Leaderboard: Use them to drive competition.

End State: *Can answer the question, "Will we hit our target?"*



Continued...

Document Review

- **Sections**
 - **Executive Summary**
 - Reason: This is gut check to show the expected in quarter revenue performance of the sales team
 - Insight:
 - *Quota*: Are we going to hit your quota?
 - *Range*: What is the range of outcomes?
 - **Deal Review**
 - Reason: Inspect what you expect- assess the deals that make up the sales team pipeline.
 - Insight
 - *Closed Won/Lost*: What has changed in the last week?
 - *Upcoming*: What is closing in the next month?
 - *Plan*: What major deals do we need to discuss?
 - *Pipeline Integrity*: Are these deals real?
 - **Top of Funnel Review**
 - Reason: Determine how the team can impact the forecast with deals not represented in the expected range of outcomes.
 - Insight:
 - What Top of funnel pipe can we pull into this quarter?
 - What late stage deals from next quarter can be pulled in?
 - **Leaderboard**
 - Reason: Create competition by ranking the sales rep relative to his/her peers
 - Insight
 - *Who*: Who has closed the most revenue?
 - *What*: What deals are allowing them to be successful
 - *Why*: Why are they successful?
- **Executive Summary**
 - **Team Attainment to Target QTD**
 - Reason: This is a gut check to show where the team is today (under, at, or above quota)
 - Insight - Gap: What is the delta between quota and attainment?
 - **Expected Finish- Base**
 - Reason: This gives you a clear understanding of the worst case scenario for the sales team
 - Insight: *Worst Case*: If the team only closes what has closed won+commit, where will the team land?
 - **Expected Finish- Expected**
 - Reason: This gives you a clear understanding of where you can expect the sales team to end the quarter.
 - Insight: *Expected*: If the team only closes what has closed won+commit+most likely, where will the team land?

Tenet IV

I shall decrease the # of the databases I use

Significance

Adoption: 1 source where all data is located.

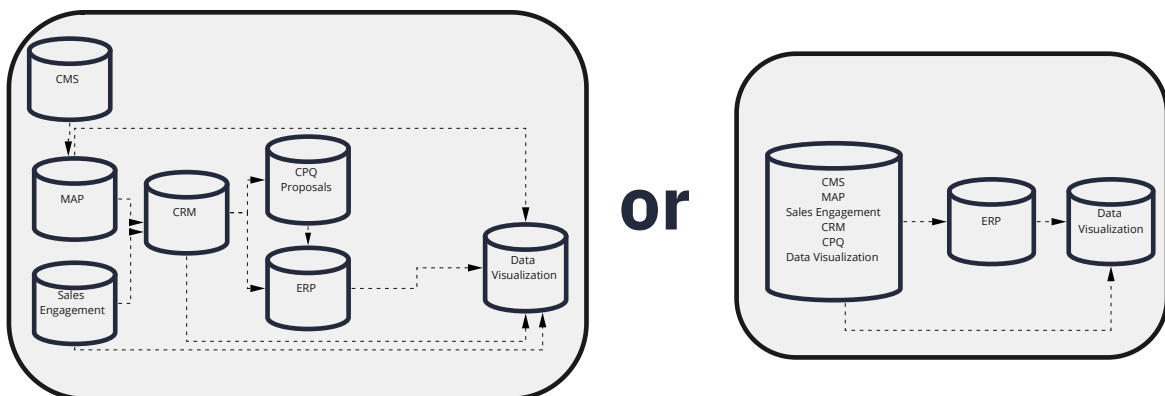
Adoption: Back offers users.

Admin: Decreases need for admin.
Less integrations to manage.
Helps you specialize on less tools.

Application

CRM: Get one and start using it.

Combine MAP + CRM: Put marketing and sales in the same database, reporting from same data.



End State: *Multiple departments do their reporting in one system*

Tenet V

I shall draw my processes

Significance

Adoption: You follow processes you can see. Foundational to training.

Improvement: Can visualize what is missing + seeing areas to automate. Helps prioritize "bottlenecks."

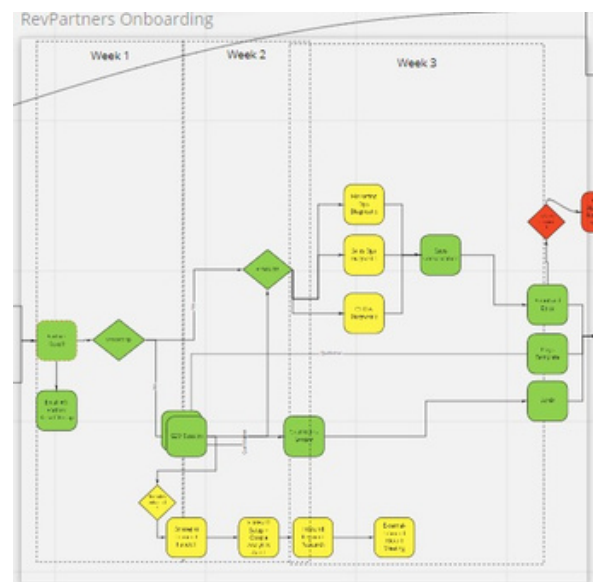
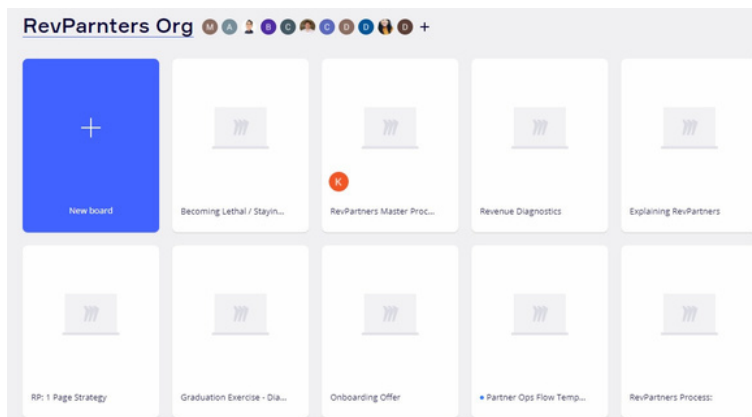
Onboarding: Decrease ramp time. Makes shadowing more useful.

Application

Signup for Tool: Recommend Miro or Lucidchart.

Pick a Process: I recommend starting with Sales Stages - Pipeline.

Force It: You will never have enough time. Block the time on your calendar with people.



End State: *All Customer Touch Points from Sales to Delivery are drawn out*

Tenet VI

I shall measure marketing by revenue sourced.

Significance

Adoption: Marketing will ensure sales data is correct. More eyes on the data.

Focus: Common goal creates focus on what is working.

Customer: Marketing focuses more on customer and less on MQLs.

Innovation: Marketing focused on dark funnel + BOFU.

Application

Never Ask: How many MQLs do we have.

Add Marketing: Add marketing to weekly sales call.

B2B Attribution: Focus attribution on the deal level (not contact).

Add Deal Source: Add deal source to lists in weekly sales meeting.

End State: *Marketing and Sales like each other*

Tenet VII

I shall eliminate Excel/Google Sheets

Significance

Adoption: The fastest way to destroy an CRM - let a rogue Excel have more accurate data.

Opportunity: Excels are created for 1 of 3 Reasons. Find the reasons and iterate.

- 1.Consolidation: Data is not in one place
- 2.Can't Find: Data is not being collected
- 3.Training: Person doesn't know system

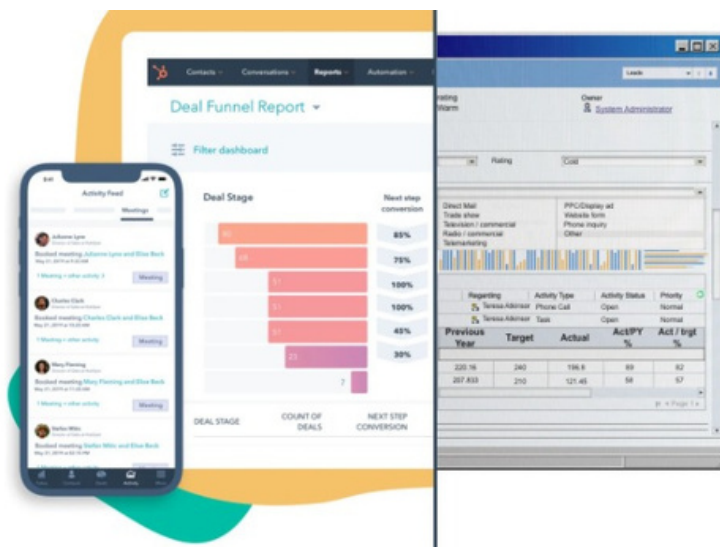
End State:

Data Collection, processing, and visualization occurs via 1 tool

Application

Don't Allow It: If you see it, ask that question "Why is this not in the CRM?"

Stay Alert: Lead your team to answering their questions within the CRM.



Tenet VIII

I shall hire a

RevOps resource

Significance

Adoption: Processes need constant iteration. Growth begets complexity

Profession: RevOps - creating actionable data via behaviors -> translation of data into strategy / tactics - is a profession.
Best practices exists. Don't reinvent.

Application

Do it Yourself: Watch the RP + HubSpot How to Hire a RevOps Jedi Webinar

Hire RevOps as a Service: RevPartners and others.

RevOps Recruiter: Find a recruiter that specializes.



End State:

Sales friction reduced -> value of new hire increased

Final Words

Start Simple

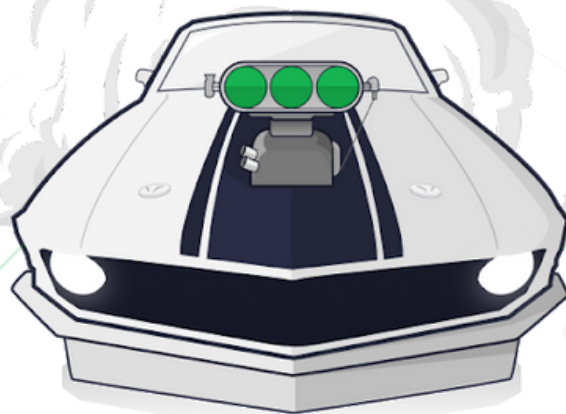
Do the basics well.

Don't Skip

Move fast, but don't skip. Behaviors take time.

Be Disciplined and Iterate

Your solution today, is your problem tomorrow.



Ultimate Checklist

Tenet 1:

- **Track:** Track adoption of tools.
- **Iterate:** Starting a new process / tool is 25% of the journey.
- **Selection:** Use the criteria - "How easy is it to use?"

Tenet 2:

- **Schedule:** Schedule recurring meeting with sales team.
- **Never Skip:** If VP isn't there to run, someone else does.
- **Timing:** Start as soon as sales team is >1. Best day is Tuesday.

Tenet 3:

- **Dashboard:** Use ONE Dashboard. Use it every time.
- **Question:** Ask the same questions every time.
- **Leaderboard:** Use them to drive competition.

Tenet 4:

- **CRM:** Get one and start using it.
- **Combine MAP + CRM:** Put marketing and sales in the same database, reporting from same data.

Tenet 5:

- **Signup for Tool:** Recommend Miro or Lucidchart.
- **Pick a Process:** I recommend starting with Sales Stages - Pipeline.
- **Force It:** You will never have enough time. Block the time on your calendar with people.

Tenet 6:

- **Add Marketing:** Add marketing to weekly sales call.
- **B2B Attribution:** Focus attribution on the deal level (not contact).
- **Add Deal Source:** Add deal source to lists in weekly sales meeting.

Tenet 7:

- **Don't Allow It:** If you see an excel, ask that question "Why is this not in the CRM?"
- **Stay Alert:** Lead your team to answering their questions within the CRM.

Tenet 8:

- **Hire a RevOps Function:** Do it yourself, hire a service, or find a recruiter to help.