

REV OPS MATURITY LADDER

REV OPS TRANSFORMATION

Level of Rev Ops capability & business impact

AD HOC		REACTIVE		PROACTIVE	SERVICE	VALUE
- No official Rev Ops team Descriptive reporting Manual reporting (in Excel) Poor data quality and availability - Gut-feel decision making - Lacking processes (sales, compensation, invoicing, etc.)		- Individual Rev Ops members Descriptive Analytics Partially automated insights - Limited KPI accountability - Key reports available for most of the organisation Key data in ok quality Siloed data Reactive response to data requests		- Centralised & Skilled Rev Ops team Diagnostic and Predictive Analytics Automated reports & ETL - Rich reporting database Proactive approach for capturing and prioritising data requests Data quality measures - BI used throughout the business Rev Ops strategy	- Rev Ops as a service provider Focus on usage Prescriptive Analytics - Advanced Analytics PoCs Strong data driven culture - Self-serve reports built by citizen data analysts - Strong data governance - Regular communication about data successes and updates to the whole organisation Rev Ops strategy linked to the overall business strategy	Rev Ops as a Value Driver - Strong KPI accountability Automated prescriptive analytics Advanced analytics/Data science capabilities - Operationalised & systemised advanced analytics - Data rich CDP Internal data community sharing knowledge and promoting data use - Self-serve tools available to partners - suppliers, retailers, distribution partners, etc.
UPSIDE		✓ Higher confidence in decision making ✓ Faster insights ✓ Improving data quality		✓ Freed up Rev Ops time to focus on build new insights ✓ Much improved insights (less uncertainty/better decisions)	✓ Strong data driven culture ✓ Rev Ops aligned with the overall business strategy	✓ Maximising the potential of Rev Ops, the business leaders and staff (accountability) ✓ Codified knowledge sharing
RISK		✗ Limited intelligence (lacking follow up answers) ✗ Rev Ops overloaded with manual/low value activities		✗ Too many dashboards might not be translating into usage and culture ✗ Limited KPI accountability	✗ Rev Ops still operating as a support function ✗ Limited skill growth	✗ Complacency ✗ Focus on shiny new toys (e.g. Advanced Analytics)

GETTING THE FOUNDATIONS RIGHT

FORECASTING

- **Minimising risk while maximising growth**
- **Effective resource planning and utilisation**
- **Healthy cash flow**

PIPELINE MANAGEMENT

- **Get a clear picture of ALL the live deals**
- **Ensure the deals move forward**
- **Drive pipeline generation**

PERFORMANCE MANAGEMENT

- **Drive Accountability and Continuous Improvement**
- **Shift focus to leading indicators**
- **Remove excuses and uncertainty**
- **Enable personalised coaching**

WHAT DO THE MOST SUCCESSFUL COMPANIES DO?

PEOPLE

- Executive Ownership & Leadership
- Rev Ops driving the business (not just a support function)
- Mindset: Simplicity & Transparency

PROCESS

- Standardised processes, KPIs, dashboards (for the whole org)
- Cadence that happens (non-negotiable)
- Focus on what truly matters (cut the fat, discuss outliers)

PLATFORMS

- Smart use of technology (early adopters, less is more)
- Adoption is king (more important than the tool itself)
- Data Driven Culture (single source of truth, integrations)

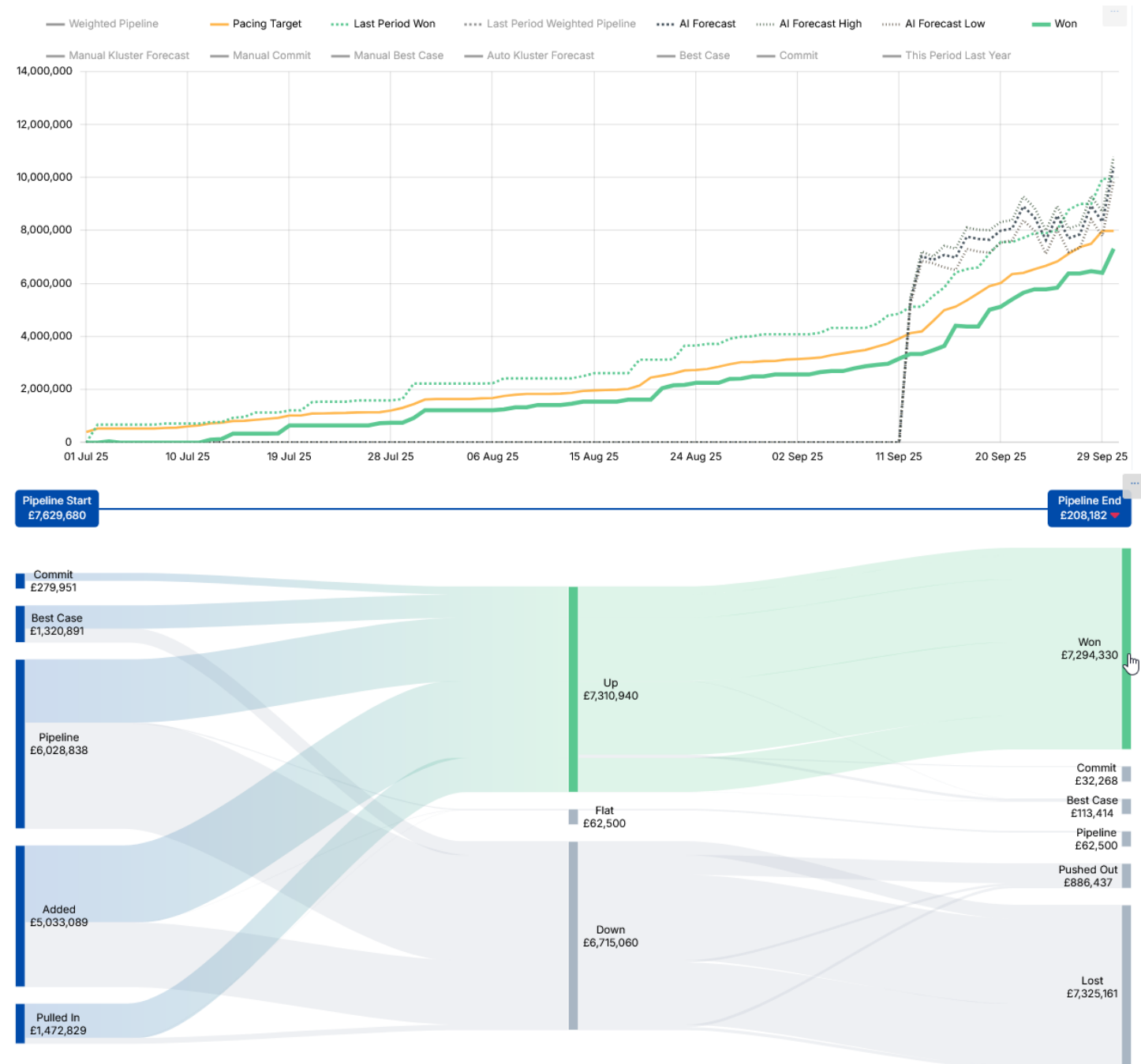
FORECASTING

Key Questions to Answer

- **Are we on track to hit our target this quarter?**
- **What happened with our pipeline** in the last week/month/quarter?
- **How accurate are our forecasting categories** (commit, upside, pipeline)?
- **Which teams and reps are the best/worst** when it comes to forecasting accuracy and why?

Process and Cadence Tips

- Day-by-Day forecast rollup (e.g. Mon front-line sellers, Tue team leaders, Wed VP of Sales, Thu SLT)
- Live dashboard with easy drill through to zoom into individual deals



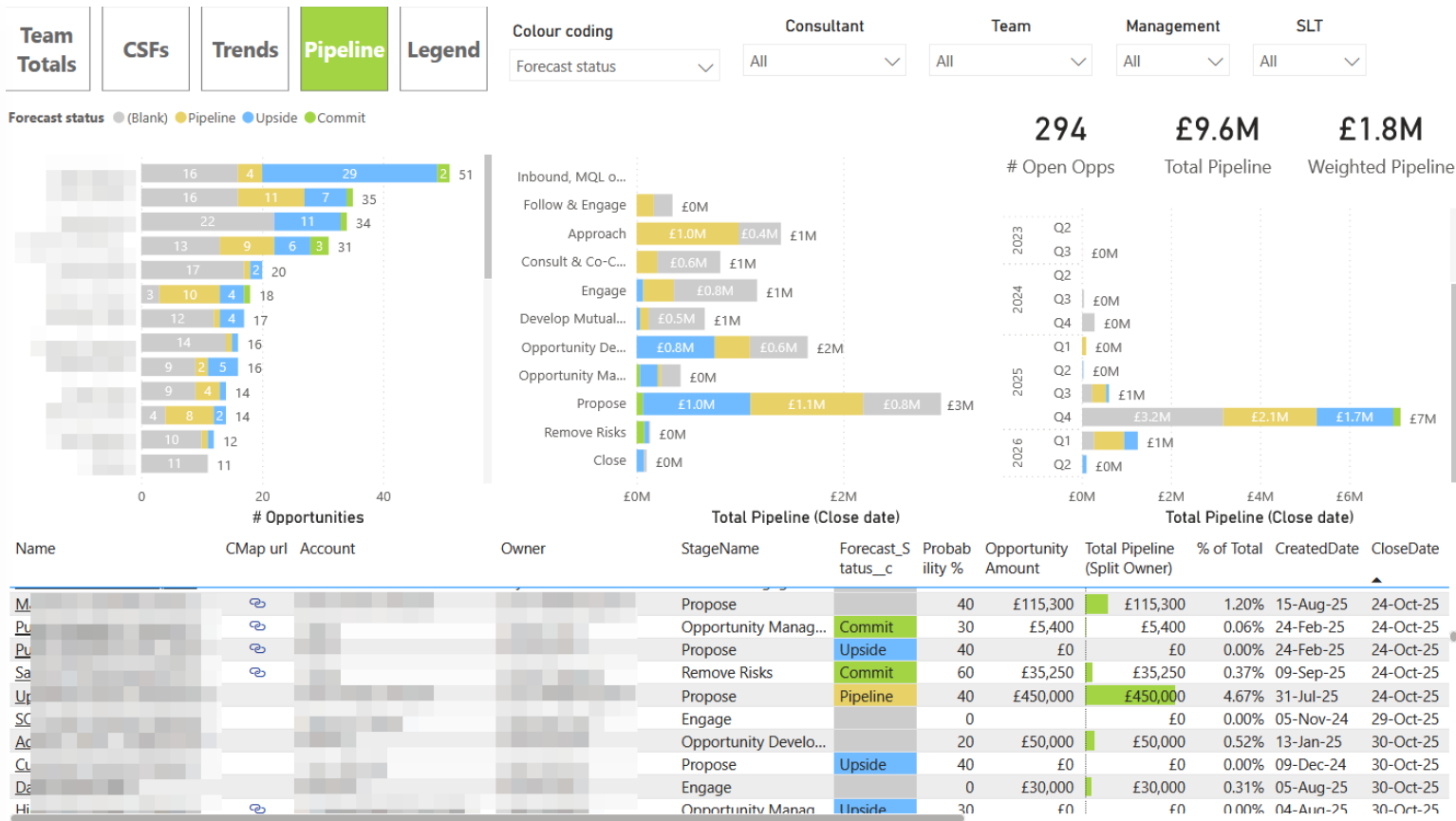
PIPELINE MANAGEMENT

Key Questions to Answer

- Do we have enough pipeline coverage for this and next quarter?
- At what stage are the deals in the pipeline?
- What proportion of deals fit our ICP?
- Which deals are at risk (e.g., stalled, slipped multiple times) and should perhaps be closed lost?
- Which reps have too few/too many opportunities at hand?

Process and Cadence Tips

- Regular review rhythm (weekly + strategic monthly), align with forecasting
- Review & Coach by exception (not every deal)
- Strong & Clear Exit criteria
- Executive champions amplifying the Rev Ops calls for clean pipeline data

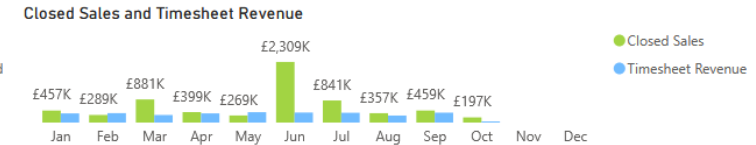
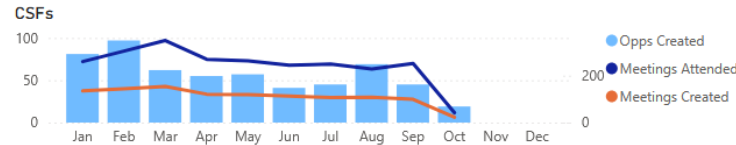
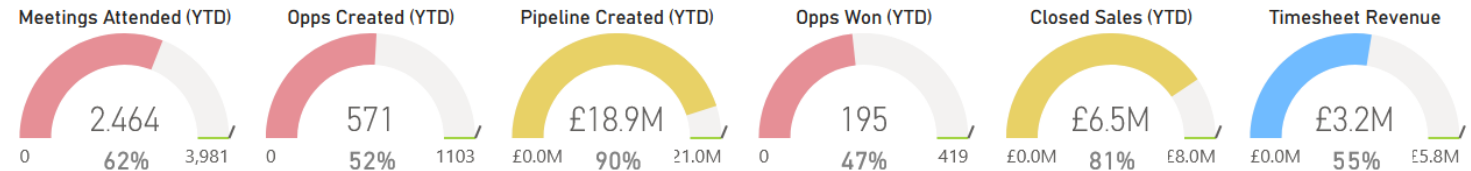


PERFORMANCE MANAGEMENT

Key Questions to Answer

- How are sales reps performing against their quota this quarter/year to date?
- Are individual reps making enough activities to hit their pipeline creation targets?
- What does each individual need coaching on?
- Where are the pockets of excellence within our team and sales process? Who can we learn from?

Team Totals	CSFs	Trends	Pipeline	Legend	Period		Consultant		Team		Management		SLT				
					2025		All		All		All		All				
Name		Sales Target Var	Delivery Target Var	Total Pipeline	Weighted Pipeline	Contacts Created	Meetings Created	Total Meet Created	Meetings Attended	Opps Created	Meet Att : Opps Cre	Pipeline Created	Opps Won	Opps Cre : Opps Won	Closed Sales	CL Sa	
		82.0%	-57.8%	£316,640	£5,252	277	54	113	116	27	4.3	£1,150,024	7	3.9	£488,607	£1,150,024	
		77.4%	0.8%	£312,065	£24,026	46	5	50	52	10	5.2	£332,774	3	3.3	£136,108	£332,774	
		47.7%	-17.7%	£1,059,530	£69,612	84	20	51	52	27	1.9	£1,558,290	6	4.5	£396,460	£1,558,290	
		28.9%	24.0%	£20,000	£0	8	6	6	6	5	1.2	£90,484			£49,449	£90,484	
		27.0%	10.8%	£524,010	£51,202	875	49	142	143	50	2.9	£857,566	14	3.6	£340,900	£857,566	
		10.7%	-78.3%	£1,106,651	£195,979	583	29	195	192	83	2.3	£2,888,454	9	9.2	£1,486,123	£2,888,454	
		9.6%	-69.6%	£17,200	£1,440	564	14	32	35	27	1.3	£123,968	10	2.7	£75,641	£123,968	
		0.7%	-76.1%	£545,913	£133,245	583	131	154	156	62	2.5	£1,252,540	16	3.9	£386,070	£1,252,540	
		-13.5%	-61.9%	£1,338,319	£321,124	1,231	81	173	173	96	1.8	£2,327,750	18	5.3	£829,047	£2,327,750	
		-17.2%	-61.9%	£1,533,461	£338,561	943	144	291	290	102	2.8	£3,375,354	37	2.8	£1,111,597	£3,375,354	
		-30.8%	-27.7%	£204,499	£57,320	39	55	123	124	26	4.8	£464,991	6	4.3	£185,676	£464,991	
		-52.5%	-30.8%	£374,912	£85,065	359	91	139	143	26	5.5	£582,205	5	5.2	£91,163	£582,205	
		-54.9%	-22.3%	£377,941	£159,127	757	44	114	115	29	4.0	£1,165,253	13	2.2	£224,648	£1,165,253	
	Total		-19.0%	-45.9%	£9,566,422	£1,800,221	13,725	1123	2,459	2,464	571	4.3	£18,885,628	195	2.9	£6,458,628	£6,458,628



Process and Cadence Tips

- Clearly defined set of KPIs (e.g. win rate, sales cycle, quota attainment)
- Non-negotiable cadence of data empowered performance catchups & reviews
- Focus on leading, not just lagging indicators