Structuring Your RevOps Team

How Silos Impede You From Delivering Delightful Customer Experiences

Let's talk about the customer experience. What is customer experience? What are silos, and why are they blockers to the customer experience? How can you structure your go-to-market organization so that passionate people like you can deliver delightful customers experiences?

Customer experience is the impression your customers have of your brand as a whole throughout all aspects of the buyer's journey. It results in their view of your brand and impacts factors related to your bottom line, including revenue.

According to Merriam-Webster's dictionary, a silo is "an isolated grouping, department, etc., that functions apart from others especially in a way seen as hindering communication and cooperation."

Now that we have that foundation, check out this social post from HubSpot Executive Chairman Brian Halligan. In the post, he said that for the year 2009, your product needed to be 10 times better than your competition in order to succeed. As of 2019, however, your customer experience needs to be 10 times better than your competition in order to succeed.

So, if your company's customer experience is better than your competition's, then you'll thrive and become the winner within whatever market you're in.

Because of macroeconomic shocks like COVID-19, many companies have been forced to become digital-first or, sometimes, digital-only. Because of this, the customer experience matters more than it ever has before.

Think about the daily choices you're now making, which are different than what you did five years ago. What home deliveries do you care about; what are you ordering and shopping for online? Think about your purchase history and which customer experiences have enhanced or broken your trust in a company.

We all know that delivering delightful customer experiences is important, but when it comes to actually making that happen, the biggest challenges are all within your company.

It comes down to how organized your customer-facing functions are, how you actually propel your internal processes, and how much alignment you have. This journey allows you to deliver powerfully positive customer experiences that draw people back again and again.

Alison Elworthy, HubSpot executive vice president of revenue operations, exemplifies this with her example of purchasing a new mattress.

Alison Elworthy: We believe at HubSpot that creating a disruptive customer experience is one that's going to differentiate us from our competitors. There are so many examples of this out there. One that comes to mind, because I just went through this process is mattresses, right? Like a mattress is a mattress. Maybe there's been some innovation with being Tempur-Pedic versus spring, but for the most part, you're buying a mattress. But, I went through Casper, which was a much better customer experience than having — especially in this day and age of being in a pandemic — of having to go to a store, test out a bunch of different mattresses, lie on the mattress. The mattress was delivered to me. It was all rolled up so I could bring it upstairs and unfold it. I also had the opportunity to return it if I didn't like it. I mean, that was an exceptional customer experience. And, the reason I went to them and why I'm going to refer Casper to my friends is because of that experience. It wasn't necessarily the mattress. I'm sure if I bought a mattress at, you know, whatever mattress company, it could have been a better mattress. I'm not sure, but it was that customer experience of buying and purchasing a mattress that really

differentiated Casper compared to some of their competitors.

This goes to show how critical customer experience is.

Here's the thing: delivering a delightful customer experience takes thoughtful reflection and dedicated effort. This can become increasingly complex when you're trying to scale.

On the surface, silos can seem manageable. After all, companies traditionally operate in silos. When you're a startup, you may have individual people overseeing different teams, each providing different parts of the customer experience. Because your company is still quite small, it's easier for internal stakeholders to communicate frequently and stay aligned – making it easier to deliver and maintain a unified customer experience.

When companies are in hyper-growth mode, it can feel easier to allow teams to operate independently instead of slowing them down with processes. Unfortunately, this creates structural gaps that in the long-term, require more people, project managers, and meeting times to resolve. It ends up costing more time than if you were to pause and break down those silos in the first place. Permitting silos to remain can be an expensive way to run your business.

When teams are siloed, the gaps between departments become part of the customer experience. Without a clear owner, customer handoffs between teams are often painful and incomplete.

We all know how annoying it is to explain a problem to multiple operators when calling a company support line. That's the kind of customer experience you inadvertently create when silos exist in your business.

Having a leader who oversees and intentionally connects marketing, sales, and customer success operations can work to eliminate silos, bringing all of these teams into alignment.

Yamini Rangan: When you operate in silos, you're spending a lot more time in meetings, bringing together teams, having PMO functions and cross-functional initiatives. It just takes time. And, as we were scaling, we wanted to be big and fast, not big and slow. I think this is fairly typical of a lot of companies in our space – as we are scaling, you've got to be able to look at where you need to go and adjust the organizational strategy based on where you need to go. So, it was our company's vision to bring all of the customer-facing organizations – including Marketing, Sales, and Customer Success and the operating teams around it – into one single organization. And, that is what we call the flywheel team.

Bridging cross-functional teams with intentional, strategic RevOps is important regardless of the size of your company. The reason why is because it tightens handoffs between teams and individuals when delivering the customer experience.

Matthew Volm: Even if it's just a marketing team of one, a sales team of one, and a customer success team of one, I think that's when you're going to have different tools, different systems, different processes. You're going to have hand-offs taking place. Silos can start to get created. And so, you might only be a company of ten people at that point, but I think once you get to that place, and you start to have multiple functions popping up, that you need some operational support. I think that's the time when you need a dedicated operations person to come in the door and kind of wrap their arms around that.

That isn't to say that change can't happen without putting a singular person at the head of your RevOps organization, but what it does mean is this: In order for you to make change happen, you need to be accutely aware of your silos. Think about how you organize either formally, through a reporting structure to an experienced operations leader, or informally, by establishing a regular operating cadence during which the leaders of these operations organizations can come together and make decisions.

Alison Elworthy: That's a great point. I mean, we just recently kind of moved to this model on the right, and it's been such a transformation for the go-to-market teams that we're working at as one single go-to-market team, really focused on that end-to-end experience and take ownership of that end-to-end experience. And, we truly believe, you know, the way that you're organized and you're operating internally is a direct reflection of that customer experience. But, you don't have to go through a big reorg. Right. And, I know a lot of companies maybe aren't at this stage even to have this type of organization. I think what's also helpful is having a kind of framework or at least a mindset in your company in terms of how you want to operate. And so, one thing that we've done at HubSpot in the early ages is created this mindset where we talk about solving for customer value comes before everything else. So, CV comes before EV, which stands for enterprise value — what's best for the business — which comes before team, you know, solving for your own team, your own function or silo, which comes before me. And so, this is something that we established at HubSpot in the very early days, in terms of just like how we should think about solving problems, how we should think about solving for the customer experience. And, I think your whole business can adopt this mindset or framework as they're going about their day-to-day work. So, it's not just, you know, leadership's responsibility or how you're organized. It's kind of a mindset and a framework that I think is helpful for your whole organization to have, as you think about creating a disruptive customer experience and solving for the customer.

As you think about how to organize your RevOps organizational structure, have grace on yourself. It's not like you wake up one day and say, "You know what? We want to be in silos." What happens in companies is that organizations are mandated to grow really fast.

As your company grows, it's much easier to begin organizing departments and functions without looking left or right. So, you end up creating a lot more meetings, hiring a lot more people, starting a lot more projects, and setting up a lot more coordination to be able to look left and right to the next functions and then align.

Yuri Dekiba: I can say from personal experience, the larger your company is and the longer they have been in business, the more likely those functions are already siloed in a structural manner from an organizational perspective. In smaller companies, you have the opportunity to have them under one umbrella because you're starting from scratch and building something.

Think about an organization where Marketing and Sales don't have streamlined communication. Their siloed strategy views might result in adversarial interactions or finger-pointing. At the end of the day, though, Marketing and Sales serve the same person, which is the customer.

Part of this is realizing that most customer experience challenges stem from limited foresight as you grow. You can't afford to lose time in silos. You need to have one foot forward as an entire organization serving the customer.

Matthew Volm: You're not accountable to the head of Sales or the head of Marketing. You're accountable to the business. And so you're like, "Okay, what's more important this quarter? Do I do this marketing thing or this sales thing?" And obviously, if you pick the marketing thing, everyone always wants what's best for the business, but at the end of the day, we're also people and we want what's best for us. And so, you pick the marketing thing, and the sales team might be like, "Okay, but my thing is more important, and I really want it done." And, so then, people start figuring out, "Well, I need a sales ops person," or "I need a dedicated ops person on my team that reports to me so that I can just have them do the stuff that I want." And so, it doesn't take much for those silos to get created.

It's completely valid that as an individual, you want, and even need, operations personnel to help fortify your efforts. Here's advice from Alison Elworthy on what might happen, though, if you let these silos slowly form.

Alison Elworthy: During business school back in 2010, so HubSpot was this like nimble, quick, small scrappy startup, and we moved so incredibly fast. And, it was an exciting time to be at HubSpot. And, you know, as you

grow in scale as HubSpot did, which was great, you add resources, you add headcount, you add people because there's bigger, bigger goals that you have to accomplish as a company if you want to continue to grow, which is all well and good. But, what ends up happening is that, you know, your focus starts to narrow. And, as your focus starts to narrow, you create these silos, but then more silos pop up, right, as the company continues to grow. And then, you take a step back and it's like, "Oh man. I have to now, in order to get something done, coordinate with 10 different people!" So like, you know, part of my job in operations in the past was cat herding. Right? It's like how do we pull all these people together? And then, how do you make decisions? Like decision-making slows down because who's the decision-maker here? And then, when decision-making slows down, your execution slows down. So, this what we call the, you know, the complexity as you continue to grow at scale – complexity enters, and complexity can cause friction. And so, if I had that rewind button, I would think about our time scaling and kind of wish I'd lifted my head up a bit and been more thoughtful about how we were operating as a business as we continue to scale.

Go to each go-to-market, or GTM, organization and ask them, "What is your goal? And, what is your vision?"

Most of the time, the sales organization will be a number, such as earning 100 million dollars. The marketing team might say that they want your brand to develop and increase the qualified lead volume. For Customer Success, it might be having a great net promoter or customer satisfaction score.

If their visions don't all have the word "customer" in them, that's your indication that you're operating in silos and aren't all aligned to who you're actually serving. Sure, when you're creating key performance indicators, it's important to quantify your goals. However, when you're speaking of your vision and framework for how you choose those KPIs, that's when you need to focus on the customer alone. As an example, here at HubSpot, our winning aspiration is to deliver delightful customer experiences at scale.

Yamini Rangan: This is like my best customer experience story. I stayed at a resort maybe like, this was all before travel, you know, five years ago. And, I stayed at two places. This was actually in India. I stayed in one place in Delhi and then I moved to Jaipur, the two places. And, I stayed in the same hotel chain. By the time I got to the second hotel chain, they knew I take coffee. My husband takes tea. One of my kids takes orange juice, and the other one takes apple juice. And, we were just struck by this. We were like, "How? How did you know? We like came and sat at the breakfast table and we had that." Their systems, their internal alignment, their processes work so seamlessly that you go from one location to the other, all of the customer preferences have gone through. The handoff was like the most seamless I have ever seen. And, that's what a digital experience also needs to look like – a seamless transition from one to the other.

Remember, internal friction causes customer experience friction. But, internal alignment cultivates a seamless, delightful customer experience that results in happy customers who become your promoters.

Breaking Down Silos and Fueling the Flywheel With Your RevOps Team

Breaking down silos is the most important step on the path to delivering a great customer experience.

There are a few key steps to breaking down the silos in your company and fueling your flywheel with a revenue operations team.

To begin, let's align on HubSpot's adaptation of the flywheel model to explain the momentum you gain when you align your entire organization around delivering a remarkable customer experience.

HubSpot uses the flywheel to describe the process of strangers becoming prospects, prospects becoming customers, and customers becoming promoters, who then, draw more strangers turned prospects. Conversely, the funnel starts with Marketing generating leads at the top. Then, your salespeople engage those leads within the

funnel, and then, the customer just drops out at the bottom — with no place for them to go. Then, you just start thinking about how to get your next customer. All of the value that you gained by winning that customer is now gone. With the flywheel, the customer is at the center of everything that you do. Operating from a customer experience perspective means you'll think constantly about how you attract, engage, and continually delight your customers over and over again. This is what fuels the flywheel and causes it to spin. As you delight more customers, you attract more customers. That's what we mean by the "flywheel." Bringing together the customer-facing organizations — which include Marketing, Sales, and Customer Success — helps them focus on serving and delighting the customer.

This approach applies no matter the size of your company. Whether you're 50, 1,000, or even 10,000 employees, internal alignment is the antidote to friction in the customer experience. And, all it takes is starting simple: align your go-to-market operations teams and operating cadence.

To align yourself with other organizations across your company, you need to first assess how much time is spent in strategy and planning with your other organizations every year. Depending on the size of your company, it could take three, five, or even seven months-long to figure out what your objectives and key results should look like for the next year, three years, or five years.

Alignment is more important than strategy when deciding how to move forward as a company. When every organization or team has different strategies and plans, many things can go awry. There will be miscommunication about expectations, duplicate work, and conflicting goals and priorities. Money is often wasted that way, and strategies and plans will take much longer to achieve — if at all.

What does this tell us?

This means that every time you connect with other team leaders across your company, you all want to be able to walk away knowing exactly what your strategy is. You want to be able to unanimously answer yes to, "Do all frontline employees, managers, directors, vice presidents, senior vice presidents, and so on, have the same sense of what the strategy is and to what their true north is?" You want everyone to easily recall what your customer-facing strategy is.

When vectors align like this across your company's various organizations, that is when execution of your cohesive, aligned strategy happens.

Secondly, let's talk about how to fuel the flywheel by building a thoughtful and intentional RevOps team.

You can certainly take the HubSpot approach that we've seen work for other organizations. This is where you take the marketing, sales, and customer success teams, also known as the flywheel teams, and put them under one leader.

Greg Keshian: There's so many parts of the process where things transition from team to team. So, leads transition from Marketing over to Sales, or customers transition from Sales to Customer Success, and if you have your operations people all siloed, then things are going to break at those connection points. Whereas, if you have all of your operations consolidated under one umbrella, then you can make sure that you can actually focus on those transition points because those are usually the points of the highest risk, where things get dropped, or lost, or broken. So, you can really focus the efforts on making sure that those transitions happen really nicely so that the experience is great for the customer, and so that people on both of those teams know exactly what's happening and what they need to do.

If you don't have that luxury, you can still create a customer-facing organization that is customer-facing and focus on a cadence.

Doug Davidoff: Adding a person – who, by the way, doesn't even have to be a peer – ideally at a strategic level, they're a peer. But, maybe you're the RevOps manager, and you are in the group with Sales, Marketing, and Success. Your job is to take that viewpoint. To one degree or another, I would recommend that that person report – if you have a Sales, a Marketing, and a Customer Success person – I think your RevOps person should report to the same person that those three people report to.

If that doesn't work for you, keep in mind that how RevOps applies to your company will be slightly different than how RevOps applies to all other companies. This is where having RevOps as a mindset across your customer-facing operations team members can have a compelling impact.

Yuri Dekiba: Regardless of the org structure, I think it's a mindset. If you're having the constant dialogue with the marketing ops team and the customer success ops teams and you're part of sales ops, and you can help facilitate that dialogue, I think that's just as powerful. And, you can say, "Our intent is to ensure that all of the touch points we have with our customers – which ultimately results in revenue generation and continual revenue retention – let's make sure our customer's experience is interconnected and seamless and not disconnected because of the siloed approach that the organizational structure might have." So, in a nutshell, I think RevOps is more of a mindset for anybody in Marketing, Sales, and CSM ops to really think outside the box and proactively reach out to each other.

At HubSpot, our flywheel executives have a biweekly meeting for all of our customer-facing leaders and go-to-market, or GTM, operations leaders. This includes the heads of Marketing, Sales, Customer Success, Customer Support, and executive RevOps leaders to represent customer-facing and GTM operations. These meetings are used to progress our alignment, as well as our execution plans. In your own customer-facing leaders's meetings, some questions you might consider answering are questions like:

- How do we get aligned around a new initiative or project that is launching?

- Do I have the right people in the room?

- Are we all focused on the right end goal?

- How do we hold ourselves accountable?

- How do we make sure our vectors are aligned so that we can execute against whatever project we might be considering, or, at an even greater scale, against how we organize our GTM teams?

If you are looking to just have an operating cadence for all of your GTM operations teams and don't have a head of revenue operations, you might want to answer these questions:

- Am I bringing my key leaders across Marketing, Sales, and Customer Success together on a regular basis?

- Are those GTM teams aligned on what the customer-facing strategy actually looks like?

- Is there an agreed-upon operating cadence for how and when these customer-facing executives and teams are making decisions on an ongoing basis?

Yuri Dekiba: It depends on if you break it out by task or activity that needs some kind of a dedicated support. And, you look at how much support you need there. You can break it out into a more structured approach.

Here at HubSpot, we changed our executive monthly staff meetings. Instead of talking about headcount and revenue, we talk about the customer. We invite a customer to every staff meeting. We even created a team called

the "Voice of the Customer" team to hold us accountable for delivering an exceptional customer experience. So, regardless of what stage of growth you're in, let the customer experience guide all of your decisions.

Next, focus on creating a customer-in strategy.

A customer-in strategy focuses on your customer. This differs from a function-out strategy. A customer-in strategy focuses on bringing customers in through a remarkable, seamless customer experience, whereas a function-out strategy focuses on how to make things easy for each siloed operations function you have on your GTM teams. This very often makes the customer experience rocky, frustrating, and even annoying.

Here are four steps you need to take to create and communicate a customer-in strategy.

Step 1, ask yourself first, "What is our winning aspiration?" Think about what you're looking to drive in your organization. What does success look like in the next three to five years? Ask people on your team what they think your winning aspiration is currently and what they think it should be. This will help you see where there are the gaps in alignment.

Step 2, think about how you want to play around with your own team structure. What areas do you want your teams to lean into? What are things that you'll want to try at some point but that you'll omit from your strategy for now?

Step 3, think about how you will win. What are the strategies, tactics, and very specific things that you will do on an annual basis that will help you get to your goal?

And Step 4, ask yourself, "What measures will I use to see that I'm successful? What will drive those metrics?"

At HubSpot, it took all the RevOps stakeholders three months to go through all the points above for the next three to five years. Our winning aspiration became this: "to deliver delightful customer experiences at scale."

Something to keep in mind is that as people create, communication often falls to the wayside. If you deprioritize communication, you risk perpetuating silos, or even growing them. Communication is essential to remaining aligned as you scale.

Yuri Dekiba: There was one mentee that I was supporting where she was exactly in that situation. She was one person, and there were two other people reporting into different groups, and our mentoring engagement resulted in her understanding and learning what the future state of Sales Ops could be if you had a fully loaded team, and your company has really grown. Understanding what is "the possible" – the art of "the possible" – when you're thinking about what you're doing. And, what I noticed is how, once you understood that – like where enablement fits, where process fits, where technology fits – what I saw her do was be able to more clearly articulate the different people's roles and responsibilities but in a very structured manner.

When focused attention is given to understanding different operations functions like this, you can create a unified RevOps structure within your business without actually having to change your organizational structure.

Chloe Barritault: I have seen sales operations, marketing operations, finance operations all sitting under different teams and, ultimately, collaborating extremely closely with each other but, at times, having maybe competing priorities because of sitting in different teams. So, the idea of creating revenue operations is to unify those functions and those roles under one team in order to create efficiencies and to align on priorities.

HubSpot's Executive Vice President of Revenue Operations, Alison Elworthy, puts it perfectly, "You haven't communicated enough until you're really sick of hearing yourself say it."

How do you ensure that communication happens and you stay aligned?

Establish accountability by measuring what matters. Focus on customer-related metrics above all else.

Sometimes companies hyper-focus on qualified lead volumes, annual recurring revenue, revenue retention, and customer dollar retention. Simultaneously, you want to focus hard on customer metrics. Review the number of customers coming in every quarter. How many are you losing every quarter? What's causing that? What is the net promoter score for the entire customer experience all the way from your product to your customers?

Lyndon Brathwaite: One of the things that really worked well for my team was when we started to bring the customer service department into our sales meetings. We would share with them, "These are our revenue goals. This is what happened with us last year. These are the types of customers we want to go after," and they actually helped us devise or sometimes break down the types of equipment or solutions that are best suited to the customer.

Sounds compelling, right? Implementing RevOps truly can have a wonderful impact on your business and your prospects and customers, but you might be wondering when the best time is to get started with it.

Jen Spencer: It's this challenge of "When do you put the infrastructure in place?" versus, "When are you going to be ready for it?" And I think, honestly, we all just have to become a little bit comfortable with being uncomfortable and know that there's never going to be a perfect time. And, the time when you decide, "All right, let's align, let's really, truly align these under one leader, and let's have dedicated resources specifically for revenue operations," you'll say, "Gosh, I wish we would've done this sooner!" But, it's okay because you probably couldn't have done it sooner.

When you're asking yourself the question of "How can I possibly get started with such a huge endeavor?" remind yourself that with this knowledge, you are equipped to convince your company leaders that there is a solid business case for why you need a RevOps strategy in your business.

Yuri Dekiba: Then it's a business case, and you're also educating your leaders on, "If you want to scale, here's a structural consideration. And, by the way, we have pockets of people doing this. So, let's just roll it under one group so there's more consistency and standardization."

As you move forward in thinking about how to structure your RevOps team, keep focused on aligning your teams and operating cadence, creating and communicating a customer-in strategy, and establishing accountability by measuring what matters.