Introduction to Revenue Operations (RevOps)

Why You Need Revenue Operations

Let's talk about scale. Scale is when business growth is faster than investment growth. Like, when revenue growth outpaces headcount growth. Or, if you want to get technical, when your net profit margin or LTV:CAC ratio improves. Many companies want to achieve scale, but it's difficult for many reasons that can be explained in one sentence: Most companies aren't built for scale. That's fine – if you work at a startup.

Daniel Remedios: Do what doesn't scale initially. Over-invest getting the earliest indicators, and then course correct. And then from there over time, these learnings, these decisions will compound to start working out who you really are here to serve, where you can find them, and how you can take them on this wonderful journey towards realizing the value of your solution.

If you work at an early-stage company, scale shouldn't be your top priority. Your top priority should focus on providing the best possible experience to every customer. And you should check in with those customers by asking them how your offering can be improved to meet their needs. The learning you'll get from those early customers will be the foundation your company will be built on. But at a certain point, your business won't be able to operate in this way anymore if it wants to continue growing.

Sarah Doughty: Oftentimes, when I come into the picture, the client's been doing really well. But, they're starting to feel some pain because they have been doing well. And the high-touch methods that they've been using up until that point are starting to become restricting.

There are a few reasons why high-touch methods start to feel restrictive. For one thing, if every prospect and customer your company interacts with is going to get focused attention from one of your employees, then the only way to get more prospects and customers is to add more headcount. You want more sales? Hire more salespeople. You have too many customers for your support team to handle? Hire more support people. That's an expensive way to grow, and you can't sustain it forever. After all, you can't hire every sales and support representative on the planet. Even if you could, the cost of acquiring and training that continually growing team would consume all your resources, further preventing you from investing in other areas of your business.

Jen Spencer: When you have a small team, it's easier to wrap your arms around every customer and every team member that's serving that customer. You probably could sit down and rattle off all of these customers or clients you have and what services that they do with you. And maybe when somebody is going to send an email out to the customer base, and when you might be able to send a quick Zoom message or a Slack saying, "Do any of the folks on this list, maybe should they be suppressed from this list?" You probably will have a couple of people that will raise their hand and say, "Oh, I wouldn't send this message to this person just quite yet." Those are the things you can do when you're a small team. And as you grow and you onboard more people, and all of that historical information that you have about customers and accounts gets passed from one manager to another, all of that just starts to get more and more and more diluted.

When you reach that point, it's time to scale and change the way your company operates. The tactics that successfully start a business need to be revamped to help you continually grow. Many businesses choose not to scale and maintain a steady size instead. Some of these businesses remain successful, but they never grow. If you're interested in helping your business achieve scale, you need to rethink the way you go to market. This doesn't mean you stop caring about individual customers. In fact, it's just the opposite. It's recognizing that you need to figure out a different way to meet your customer's needs if you're going to continue giving them a world-class customer experience. But change is always hard, and this change in particular can be a terrifying thing to

think about.

Sarah Doughty: It's scary for companies to not use that white-glove approach with every client. But just because you're doing things at scale doesn't mean that you aren't still able to add personalization and value to those interactions, even if they're done in a one-to-many way. So, if you think about building a marketing cadence to your existing clients — as long as that marketing cadence is adding value and delivering insights to the client — if it's giving industry knowledge or sharing where your product is going, those are all really valuable things for your client. And I personally, I don't think I would mind getting that through an email that is signed from my account manager but didn't actually come from him, versus getting it in a meeting. Sometimes that's okay, and I think our world is moving towards that, where people are consuming information asynchronously more and more. And so, I think that's okay.

Making that transition successfully is a big achievement, and you can do it if you're willing to invest in revenue operations. A lot of people have been talking about revenue operations recently, so it's become a bit of a buzzword. But let's set that aside and simplify it down to its most fundamental pieces. Revenue operations (or RevOps for short) is the people, processes, systems, and data that control how your business generates revenue.

Matt Bolian: (2:56-3:21) Everything a salesperson does, everything a marketing person does, everything a service person does is creating data. And so, RevOps fundamentally is just the field full of data and the ability to wield it and to search. So you're either doing it well, or you're doing it poorly, but you're doing revenue operations. You can't not exist today and not do revenue operations.

If you work at an organization that generates revenue, there's already some kind of RevOps driving that revenue, even if it's not clearly defined. RevOps as a term has only recently come into vogue because there are huge changes happening in the world that are forcing companies to transform the way they generate revenue. For example, customers are now more empowered than ever. They expect their experience with you to be better, faster, and more personalized than it's ever been before. Customers are also more connected with each other. Whether they have a positive or negative experience, they'll tell their friends about it, and that will have a huge impact on your ability to find new prospects. Fortunately, thanks to websites and CRMs, companies now have far more data to use that can provide insights into customer behavior, which can then be translated into specific tactics and strategies for improving your customer's experience. For many businesses, that customer data is spread across multiple systems and teams, but RevOps seeks to unify ownership of the systems and data, so customer insights can be used to provide a truly excellent customer experience.

Matt Bolian: (6:24-7:11) And so what's occurred is, we now have so much data, we can't even interpret what it says. Thus, you need a new person in a new profession that knows how to collect the data well — which is like implementing tools and creating good data — and can synthesize it and make it work across all your departments because all your departments have tools. And most importantly, then visualize it in a way where you can make data-informed decisions. That's RevOps done well.

Sarah Doughty: How I think of RevOps is, you know, how are you supporting the overarching goal of growing the company and retaining your clients through the infrastructure that those teams are using to do their job?

Ross Nibur: Revenue operations is about trying to take a uniform and holistic approach to how you plan those things, which stands a little bit in contrast with concepts of sales operations, marketing operations, or CS operations organizations, where they see that one piece of the business and design process.

A unified RevOps strategy is the key to scaling your business. Implemented effectively, it'll change the way your company grows. Instead of your revenue growing incrementally when you add a new employee, your revenue growth will curve upward — breaking the linear trend. And instead of being contingent on hiring, your revenue growth will enable hiring, research, development, international expansion, and a host of other investments in the

business that linear revenue growth can't afford.

However, this can't be done without an unbiased person taking a detailed look at your company's operations, while finding ways to improve them.

Yuri Dekiba: So, it's very much aligned to where you are as a company in your growth mode, and when you want to start scaling – how you are doing things. Then, I think a more formal, dedicated team focused on everything sales needs to help them be productive and efficient, which is key.

And not just sales. Your marketing, sales, and customer service teams all need formal, dedicated support in operations – and RevOps is about looking at these three segments together in a holistic way. When you do that, you can start to find ways to make meaningful improvements in your company's revenue operations without spending any additional money.

Matt Volm: If you think about a funnel or a process that goes from marketing to sales to customer success, there's a bunch of conversion rates that happen along the way, right? You start up top and you whittle stuff down. And if you can move the needle on, say, your MQL to SQL conversion rate by 5% over one quarter, and if you can hold everything else constant downstream, that improvement has a compounding effect as it goes throughout your funnel But you don't need to spend incremental dollars to do that.

Did you catch that? "You don't need to spend incremental dollars to do that!" This idea of increasing growth without adding cost is exactly what we mean when we talk about achieving scale, and it's the sort of thing that RevOps is designed to accomplish.

Matt Volm: So, take a list of target accounts that you might be going after, and then look at it by touch point in terms of the first touch, the second touch, the third touch, and look at when you see a big jump in conversion rates of getting that first meeting booked. And what that can tell you is, that might take 15 or 16 touchpoints per account to have the highest likelihood of success of getting that Nrst meeting booked. Compare that then to the outbound sequences that you have built, and it may sound obvious, but then make sure that you've got 15 or 16 different steps in each of your sequences, so that you are setting them up for the highest likelihood of success. My guess is that, if anyone is listening to this analysis right now, which you can do in a spreadsheet, is that they're probably going to Ngure out that their outbound sequences within Outreach or HubSpot or Sales Loft or whatever they're using, are probably not optimized. They're probably either spending way too much time and have way more touchpoints than needed or most likely not enough. And that's one of those things that RevOps can help inOuence really easily like, "Hey, the data tells us this right? We've got our processes set up to do this. Let's change it. We'll make it more ePcient. We'll make it more effective. It's optimized." And again, you can squeeze out some incremental revenue growth without investing an incremental dollar.

RevOps can drive these sorts of changes. It can make these sorts of improvements and that's exactly how you'll manage to get that flywheel effect to happen for your company.

Jen Spencer: So, sales hitting consistent numbers, where we have that predictability in our forecast – let's be honest, that's what makes the world go round, right? So, you have to have that sales predictability, and then from a marketing perspective, we drink our own champagne, our sales team runs off of inbound leads. We run off of demand that our marketing team is driving, whether that's from organic inbound, that's partially account-based marketing and sales efforts, but we work really closely together and we have to have that consistent pipeline of leads and opportunities that are coming in from the market. That's made it so much more effortless for me to then move across that line and move into how do we better support our clients and how do we really harness that energy that you get from clients, that Oywheel effect that HubSpot has introduced us to, to generate net new clients, to get reviews, referrals, to increase wallet- share with those customers.

Is this something your company is ready for? If it is — and, specifically, if you are the person charged with adding operational rigor to your company's go-to-market strategies — then take some time to learn the ins and outs of RevOps, and you'll be far more likely to succeed.

How to Unify Your Revenue Operations

If you've been tasked with unifying revenue operations at your company, you might be wondering where to start. The first step is to look at the data you already have.

Ross Nibur: A modern company has to leverage a tremendous amount of technology to drive their customer and internal facing processes. Those processes and technologies produce a tremendous amount of data, which gives businesses that understand how to leverage it a massive competitive advantage, and allows us to find ways of making our teams more efficient or our customers' experiences better at any stage of that buyer or customer journey.

If your company doesn't have the infrastructure to collect that data, your top priority should be implementing systems and processes to do so.

Greg Keshian: The very first things that needed to be done were just to instrument everything, so that we were making sure we were capturing all the data that needed to be captured, putting in process so that people were doing things consistently, so that it can actually be reported on and the numbers make sense. And then you're really always looking for, well what's the thing that we could do that would have the most impact to the business?

Daniel Remedios: What's critical that you need from the very early stages — a consolidated view of your customer. And what we know, understand, and what activities have been carried out with that customer, because what we can't afford is somebody comes to you, no idea where they've come from, or what they really want.

Regardless of whether there's a database in place or you have to implement one, once you're able to examine your company's data, you shouldn't jump straight to making changes. First, try to understand what's going on in the organization generally.

Sandy Robinson: I'm a Stephen Covey, you know, old school. It's like, "seek first to understand," right? So, what's going on in the organization? And understand that you're going to have to be Oexible. But, it really starts in my opinion, with the core account-base — what does that look like? So, really getting your arms around that because doing data cleanup later is really hard and getting arms around who puts data in, as well. So, that's something that I'm learning today — is that there's lots of access to be able to do that. So, without shutting down the environment — putting some controls in place to really get the account database in a nice, it's never going to be perfect, but get it to a place where we can feel conNdent that we've got the right information in there and it's not duplicated. And when you pull it out, it's in a clean format in those sorts of things. So, that's always a good place to start — is look at what you have and making those relationships straight off the bat.

But even while you're seeking to understand, you need to be looking for ways to improve the quality of the data, as well. This isn't an academic exercise. The customer-facing teams at your company need good data.

Sandy Robinson: There's always going to be a messy database. And if you don't have clean data, marketing's not happy, BDRs aren't happy — nobody's happy.

You're the person who will make them happy. It's going to happen as you look at the data in your company and find ways to simplify. For example, you might find places where the data can be organized more clearly.

Ross Nibur: It's going to make sure that data is logged in a uniform way, where you don't need a PhD in data

science or post to understand the different kinds of activities that we have.

You might also find places where data isn't being collected consistently – or at all.

Sarah Doughty: Sometimes, a renewal or an expansion isn't looked at with the same level of quantifiable metrics as a new sale on the new sales side. It's really common for folks to have really clear conversion rates and pipeline metrics, but how often do you hear this percentage of our clients onboarded effectively, this percentage of our clients had a successful first use within our desired timeframe, this percentage of client renewed and expanded, like that? Those metrics are not as clean post-initial sale. And so, if you're having one group and having consistency over operations for all of those rev areas that I think helps bring consistency to how things work pre- and post-initial sale.

So, you're going to provide consistency. You're going to add clarity, and you're going to make everything simpler. As you explore these aspects of your company's data, also try to understand the processes that generate that data and look for ways you can help those processes run more smoothly.

Matt Volm: We're big believers in looking at things like conversion rates and velocity rates across your funnel. Then, the other thing that we believe people should be looking at are decay rates and rates of change within their funnel. Because I think the thing that revenue operations teams are tasked with, or can do to actually add value, is look at the ePciency and effectiveness of a go-to-market motion – Ngure out where there are things either getting stuck or not performing well, and then get them unstuck.

So, you're going to help your internal teams get unstuck. That's great. That's a huge victory. But, be careful not to lose sight of the fact that all of these processes should be serving the customer, not just your internal teams. What are they trying to accomplish in each stage of the sales process?

Sarah Doughty: You really want to think from the customer's perspective, what are they trying to accomplish in each of those stages? What are the experiences and activities they're having at each of those stages? Who's involved from their side and who's involved from the vendor side? And then, you also want to start to think about what are the feelings, the emotions, and the attitudes happening from both your internal at your company, but also from the client perspective? And that can start to shape, "Well, we're talking with these folks, but we've stopped talking with these folks," or, "We aren't doing these things around change management and it's hurting how our adoption works or it's causing us to lose engagement with clients and it's leading to churn." So, some of those exercises can be really eye-opening, just around the process in general. But, another thing that's important to do is to do that workshop with a cross-functional set of leaders at the company because it's important for marketing, sales, customer success, and product to really understand what is the experience, because oftentimes, that's part of the problem. Like, it's really hard to create visibility around what is the health and adaption and objective of customer success. Sometimes, it's not very well known inside an organization.

Eventually, you'll have a clear perspective on where your company's inefficiencies are coming from. In many cases, you'll find that these inefficiencies don't come from bad actors or even poor execution. Most often, they come from the various departments all trying to do the same thing – help your customer – but each in their own way. That lack of unity is what causes the inefficiencies you're finding.

Doug Davidoff: If you have people maxing speed, the likelihood that they're going to be all pulling in the same direction, that's really small. And so you've got to Nnd that place where you sometimes slow things down so that we're all moving in the same direction. And that's actually what allows you to decrease the effort – to decrease the pull – for the progress. Another way to think about it is, if you've ridden a bike before in Nrst gear, you're going really fast, but it's a low gear, so you're not really making a whole lot of progress. You got far more revolutions, but less progress. And when you get into your lower gears, you have fewer revolutions, but they all have more traction, more thrust with that. That's the difference between speed and velocity. Revenue operations' job is to

increase velocity, as opposed to increase speed.

Let's look closer at the difference between speed and velocity.

Doug Davidoff: Speed is a measurement of how fast you're going. Velocity is a measurement of how long does it take to get to your destination.

This is a powerful insight. Chances are, if you talk to the members of your sales team, every one of them is running as fast as they can, chasing their goals and quota. And the same is true for the folks in customer service, marketing, and in every department in your company. That's why learning to scale a business is so important. If your company is struggling to grow, the answer isn't to squeeze more effort out of your employees.

The answer is for you, the RevOps leader at your company, to bring a clearer perspective on how to make sure all these teams are pulling in the same direction.

You'll be well positioned to do this. You will have spent so much time examining your company's data and processes, that you'll understand better than anyone where the various departments are out of alignment – you can have a huge impact on your company's overall performance just by finding those inconsistencies and ironing them out. It might be little things like how quotes are processed.

Ross Nibur: If you peel back all of the layers on a process like upselling, at the end of the day, it's just another way of capturing revenue, and the mechanics in your CRM, in your quoting system, should kind of be the same. But in many businesses, the way that they do a new-business deal versus an upsell, those processes feel fundamentally different -- the kind of data that's captured in them, the win/loss information is not the same. And that inhibits the ability for them to build really seamless customer experiences, or cross-functionally train staff, or be agile in launching new products in new-business and in upselling. The cascade effect of having these systems is – again, the underlying systems processing data that work within this being different – it actually makes your business less dangerous. And so, revenue operations is trying to take all of this and say, "Hold on a second. Let's stop thinking about these things through the lens of which team is doing the work. What's happening underneath? What is the person in that role actually doing at their desk? They're sending a quote! Should we have different quoting processes for upselling and sales? Probs no, right? And so how are we going to move the needle to make those things feel uniform, feel the same?"

You, as the RevOps leader, can identify these problems. You might be the only person who can identify them, and you'll have the most informed perspective when it comes to finding solutions. But, a word of caution as you try to start making changes: you have to lead with empathy or things will not go well.

Ross Nibur: You, an operations person, you don't know what these people do every day. You don't get it. And it doesn't matter if you came from that universe. I come from a selling background. I still have not sold a toast. I've never been a frontline sales person here. And so it would be incredibly egotistical and shortsighted for me to say that I don't need to be actually curious about where they are spending time and what they think. You've got to be sincerely interested in learning about what your team is doing every day. I think this is the mistake that operations teams make is they think about these things as abstractions, when really it's something that's happening. Quoting is not an abstract process. Quoting is something you do that you sit down and you build a quote and then you send it to a person. There's like a real life experience that like you need to get. And if you don't spend the time to understand what matters in the quoting experience, what matters to my customer internally and externally, you're not going to build that process well. Nor are you going to be able to support them in that process.

This empathy and curiosity is something that a lot of operations teams get wrong.

Doug Davidoff: Too often, a sales ops function or a revenue ops function comes in with their process and their rules. And look, I had a sales operations department 20 years ago when I was salesperson, right? So this is not

new. It's now becoming really broad. And you know, we called the sales operations department the sales prevention department because they kept telling us, "No, that's not how to do it."

There's a balance you have to achieve between putting the structures in place that will ensure your company is collecting the data it needs to scale, while also simplifying things for your front-line employees.

Sandy Robinson: Our customers are not just our buyers, but our internal customers. So, that's how I look at it. I try to make things easy for them.

Sarah Doughty: There's people and there's processes and there's technology and everything kind of has to coordinate. And I think every company struggles with finding the right balance between sharing information and being too administrative, right? Like, you know, how do you set things up so that you're making sure all the right people have the information you need, but you're not creating a bunch of administrative burden for folks in order to be able to support that process?

Sandy Robinson: I think just simplifying things and salespeople all love it when it's simpler. Because there's nothing scarier than a new ops person coming in and going, "Oh my gosh, how many boxes are we going to have to check?" You know, and that sort of thing. So, I think I always try to think of the sales team and the user as a success team or the sales engineers, whoever's in the system. Can they see what they need to know? And is it easy for them to do, does it take them hours?

So, that's the goal: find ways to simplify things for your internal customers, so they can better serve your external customers. Then, you'll be able to unlock your company's full potential and break free from linear growth and start achieving scale.

What Do Unified Revenue Operations Look Like?

If you're just getting started with revenue operations, or if you're thinking about going into operations as a career, there's no better way to understand what's involved – or what's possible – than to hear stories from other operations professionals. Here are a couple of stories to inspire you.

Ross Nibur: Toast has this great internal operations story where, a few years ago, we were aiming to increase our inbound conversion rate. We had a bunch of MQLs come from the website, and the way that we had set those operating structures up allowed us to, with an incredible degree of nuance, measure where the leads were coming from, how quickly we were working them, how deeply we were working them, and when they were being converted. And taking that information, we were able to basically put together an analysis that really showed how quickly we needed to work leads and how many touches we need to put onto a record in what number of days to maximize efficiency. And I want to be clear, that didn't change the leads, that didn't change the people that were working on them or the number of calls they were making. We just changed how we prioritize the data within the system. And doing that, we doubled our inbound conversion rate. And that is not a hyperbole. We doubled that. We made twice as many opportunities – and by the way, the opportunity to win rate didn't fall. We doubled our revenue from marketing with operation solutions. And that I think highlights the power of what we're going around right now.

Wow! Those results are amazing! But they aren't totally unique.

Matt Volm: Now, I'll give you one particular example that was within the funnel IQ product. We automate all this reporting around a decay rate. And so, we show these for example, MQL, SQL conversion rates – how many marketing qualiNed leads did you convert to sales qualiNed leads? So, we'll take a cohort of those and we will look at by-day. How many did you convert to the next stage? And what that tells you is, eventually you reach a point of diminishing returns, right? Where, day four, day Nve, you start to see very little MQL converting. Well, one

customer of ours looked at that particular chart and what they realized was most of their MQL would dry up by the time they got to day four, day Nve – in terms of days old – but their SDR team was actually working on well into day nine and day ten to try to get a meeting. And so, very clearly they were just like, stop doing that and stop working any of these MQL once they get to day Nve. And instead, focus on the new leads that have come in the door. And in doing that, they improved their MQL SQL conversion rate from 33% to 45%. Everything else downstream held constant. And so in one quarter they grew their revenue by an extra 33% without spending one incremental dollar on anything. And I think that's a great example of what revenue operations can do.

These are great examples of the sorts of things RevOps can do. As you dig into your company's data and processes, you'll find all sorts of conversion rates to optimize and protocol to simplify. But don't allow yourself to think that RevOps is just about crunching numbers and improving percentages. The more you look at your company's operations, the more interesting things you might uncover.

Sandy Robinson: I remember one night, I'm sitting on my computer watching TV and I'm just kind of going through some commission reports, looking at just a bunch of spreadsheets – real boring stuff. Clearly, I have no life and just this one deal was popping out, showed up a number of times on a report and I'm like, this looks odd. So, I start digging into it and mind you, this was in an acquisition situation. So, I'm just kind of learning what this other company was doing and what the reporting looked like, and how I could make it all work together. So, I'm just poking around and as I dig in, I realize, okay, it looks like there's some duplicate sales submitted. Interesting. So, I start looking and running reports by rep and by product and all these things. And then I start looking at the commission statements and these deals were paid on multiple times. So, that was interesting information. So, I want to dig deeper. I want to Nnd out more. Tell me why. So, can salesperson question, right? Tell me why. Oh, why is that? And so I just keep peeling back the onion and then it turns out, not just the duplicate deals, but a lot of the deals in this particular, it was kind of more of an SMB sort of a sale. A lot of the deals weren't actually going live. So, I'm like, hmm. In that ratio was very high – alarmingly high – that were getting sold, getting paid on it, but not going live. So, that was interesting. Let's just say without giving any dollar amounts, there was a very large amount of commissions over the subset of data that I had access to and a large amount of unrealized revenue that was reported. It was quite alarming. So, this became a major project plan. And the first thing was, let's change the comp plans to where we're not paying until life. So, that stopped the commission's leakage. There was also some behavior that needed to be dealt with because people knew rwhat they could get away with. So, I'll just leave that one aside. The other piece was the handoff process. What's the intake, so it went from everything with training? When you sell a deal, what do they need to know to implement? So we did an intake – what went over to success? And then we train success, made a handoff process, reprioritize our attire, successes, goal, because their previous goals, new clients were at the bottom – that made no sense to me. So, we switched it. Now, they're at the top. We made a warm handoff process for implementation. I pulled data that said, "if it was six days before they actually got with success and they would never implement." So, we made reports that pushed out. We had regular cadences where we went through all the deals that were at Nve or six days and somebody hadn't addressed it. So, it was like this massive project over the course of a year and there were so many pieces of it, but, you had to know where to go and you had to know who to work with to make it happen. And they ended up completely eliminating the commissions issue and drastically reducing that number of deals that didn't actually go live – and put some checks and balances in place with Nnance. There was a lot of self-reporting and it wasn't being checked – that was a challenge. So, it's those things I just happen to notice, like, wait, I saw that name. I saw that name. I saw that name. And so you have to have that, "Oh, there might be a problem here. Let's dig, dig, dig." And then, there's not always one solution for the problem. You have to really find out what's root cause, but there may be two, three, four, five, six, ten root causes that is resulting in a significant amount of revenue loss. So, in that case, I saved the team and we saved the company a whole lot of money and put some safeguards in place, so it didn't happen again. Those are the kinds of things that I think a good rev ops team can really bubble up – not just put new things in place – but just understand where are your problems and where are you losing money? Because not everybody knows. And in that instance, you saved a bunch of money up, but the new processes, more money coming in. It

pays dividends into the future, which is the real power of it, I think.

I hope these examples excite you. I hope they inspire you to get started. Don't let them overwhelm you. You don't need to accomplish great things from the get-go. You just need to get started.

Daniel Remedios: Start small, start fast. And then over time, you'll see the results. Your conNdence levels will increase. Then, you can start placing bigger bets. You start putting technology and you start bringing more resources in, you start amplifying the processes that you started to design.

As you invest in making small changes, the positive effects of your efforts will start to compound.

Daniel Remedios: Compound effects are one of the wonders of the world. And so, these small wins that you make will have exponential returns over time. And so, don't be overawed by all of the possibilities. Start simple. Start on the customer journey, those different stages that you need to track. Find the bottlenecks, find where things are falling off, and just build against it. Document learnings, document the processes, make sure everyone understands what's going on and why we're doing it. You will feel like a parent at times, repeating yourself. But it's discipline, focus, and accountability that will yield results.

But what if you aren't in revenue operations? What if you aren't in operations at all? What if your company doesn't have anybody in operations? Well, this just might be your chance to jump in and start having an impact.

Daniel Remedios: And if you're not in rev ops and you don't have a rev ops title, but you work within an organization that has a recurring business model, call yourself RevOps if there isn't somebody rev ops. Because you're doing yourself a disservice by not looking at the full life cycle and not taking responsibility for the experience you're working in isolation. And that now is a Cardinal sin.

So, there you have it. Whoever you are, whatever your title or role, if your company is feeling the pains of not being able to scale, now is your time. Step on up, roll up those sleeves, and dive right in. The operations wizard your company needs could be you.