HubSpot Academy

Revenue Operations Workbook
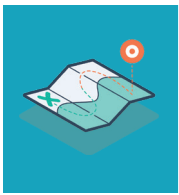
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Please Read: How to Use This Workbook

About This Workbook

The Revenue Operations (RevOps) Workbook serves as your one-stop shop for learning how to implement the methodologies and processes needed to establish a cohesive RevOps organization within your company.

This workbook moves you through your Go-To-Market (GTM) teams — including marketing, sales, and customer success — to gain a high-level overview of the people, processes, systems, and data that control how your business generates revenue. It will show you how to improve your company's RevOps to scale your company's flywheel.

Using This Workbook

Each section of this workbook represents one lesson from the Revenue Operations Certification. They help you design a basic RevOps strategy for your company. As you work through the individual activities, you will:

- Decide whether an investment in RevOps is needed at your company.
- Define a RevOps strategy using the concepts of force and friction.
- Create a strategy for persuading your company's leaders that RevOps is important and should be invested in.
- Design an org chart for your team to grow into.
- Identify and explain the skills involved in RevOps.
- Create a hiring strategy for your RevOps team.
- Evaluate your company's tech stack.

Getting Help With Your Company's RevOps Organization

If you have any questions related to your company's RevOps organization, please reach out to your company's DRI (Direct Responsible Individual) for RevOps.

Fill in the DRI's contact information below, based on how your company's employees communicate with one another. The following are examples; you'll hyperlink the specific records for your employees.

- Name: Fname Lname
- Email: example@email.com
- Slack: @example
- Teams: @example

1 Introduction to Revenue Operations (RevOps)

If your company is focused on growth, operations will be vital to your success, since Marketing, Sales, and Service all have operational needs. RevOps consolidates those needs by providing your customers with a seamless experience from first contact to closed deal and beyond.

In the Introduction to Revenue Operations (RevOps) lesson, you learned what RevOp means and how to streamline operations at your own company. This section of the workbook is designed to help you apply what you learned by identifying where your teams excel and where they have the opportunity to improve, as your business works to achieve strategic alignment.

The average mid-market company runs on 137 different SaaS apps, while enterprise companies use an average of 288 (Blissfully, 2020). Keeping that data synced, clean, and flowing to all your departments is a full time job. That's where operations come in.

As companies scale, systems grow in complexity. Every employee buys their favorite SaaS app. Every manager maintains their own spreadsheet. Every team builds their own process. Disconnection ensues. Mistrust and miscommunication flare. Efficiency tanks.

RevOps is the answer. Operations teams are the orchestrators that align teams, analyze data, and streamline processes. But too often, companies underinvest in operations, and ops professionals are forced to do reactive busywork and clean data messes instead of driving proactive strategic value. To survive and thrive, your business needs to run better. To run better, you need to reimagine operations as the architect of your growth engine, not a reactive afterthought.

Use the scorecard below to evaluate the current state of RevOps at your organization. For each statement below, award your organization…

- 4 points if the statement is always true
- 3 points if it's usually true
- 2 points if it's sometimes true
- 1 point if it's true every now and then
- 0 points if it's never true

Statement	Score
My team spends more than 50% of their time on strategic, impactful projects.	
My team uses tools that feed customer data into marketing, sales, and service activities.	
My team alerts other departments when data has been audited.	
My team tracks process inefficiencies across the entire organization.	
My team is constantly looking for ways to better improve business operations.	
My team creates reports for Marketing, Sales, and Service to draw insights from.	
My team's procedures and technology are designed to support quality customer service.	
My team manages a single source of truth for customer data that the whole company works from.	
My team owns reporting across all revenue functions (marketing, sales, and service).	
My team can automatically connect applications from across the company in one central place (without manual imports and exports every time).	

Operations Team Evaluation (Total possible score: 40)

0-16 points

RevOps at your organization is not in a good state — but that's okay! That means there's a huge opportunity for you to add value. Go through the certification course and use this workbook to make a plan for your company, and get ready to make an impact. You can do this!

17-31 points

You're heading in the right direction, which puts you far ahead of most organizations, but there's still some room for improvement. As you go through the certification course, use this workbook to identify the areas where you can most add value.

32-40 points

You are world class — congrats! But RevOps isn't a set-it-and-forget-it strategy. Revisit this workbook quarterly to look for parts of your strategy that need maintenance or revision.

2 Applying RevOps to the Flywheel

In the **Applying RevOps to the Flywheel** lesson, you learned how RevOps can uncover surprising insights about the factors that affect your company's growth. Visualizing your business as a flywheel enables you to see the forces that help your business grow, and the friction that holds you back. The flywheel is a visual representation of the three phases of the inbound methodology: attract, engage, and delight. Diagramming your business processes in this way helps you find opportunities for operational improvements. Use this section to define a strategy that optimizes both force and friction.

List the methods your company uses to attract new customers.

Tools/Processes	Teams	Metrics
EXAMPLE: Ads	**EXAMPLE:** Marketing	**EXAMPLE:** MQLs, ROI

List the methods your company uses to engage with its customers.

Tools/Processes	Teams	Metrics
EXAMPLE: Sales Outreach	**EXAMPLE:** Sales	**EXAMPLE:** Closed-won deals

List the methods your company uses to delight its customers.

Tools/Processes	Teams	Metrics
EXAMPLE: Live Chat	**EXAMPLE:** Sales, Services	**EXAMPLE:** Response time, Customer Satisfaction Score

Now it's time to draw your flywheel. Here's an example of what the finished product might look like:
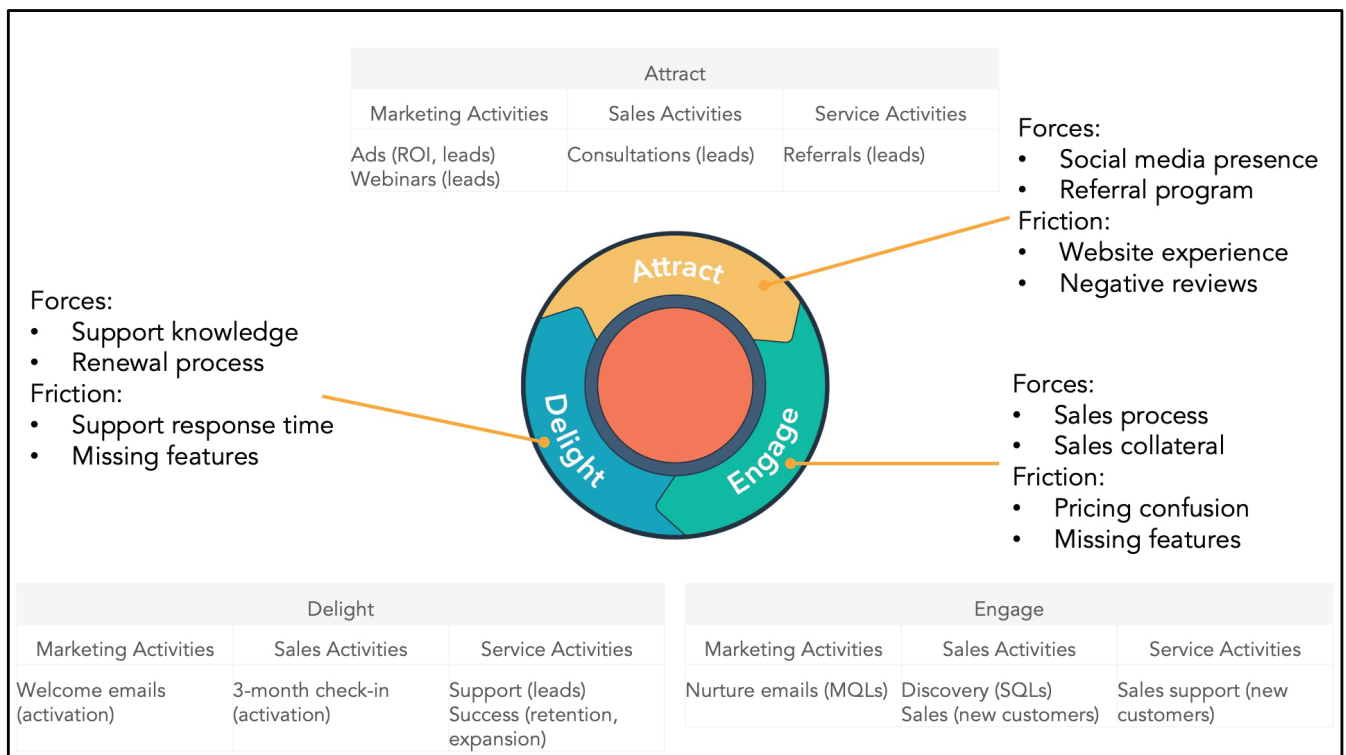
Use the box on the following page to draw your flywheel. Start by listing the tools, teams, and metrics you identified in the previous activities.
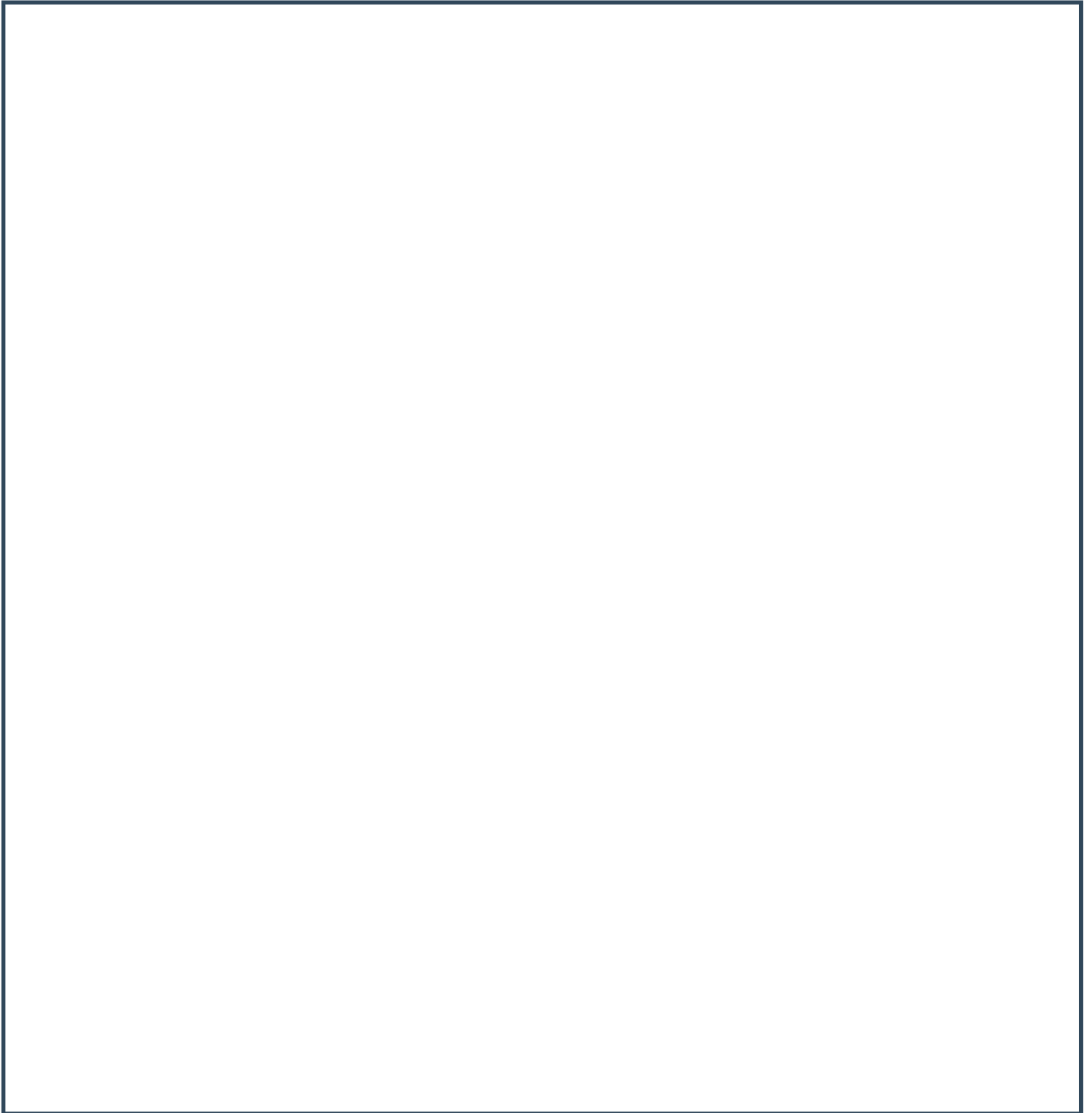
Examine the flywheel you drew.

Where do your customers experience the most friction? Where do your internal teams experience the most friction? Where is your company exerting the most force? Are there any areas where your company should be exerting more force? Add forces and friction to the flywheel you drew (see the example for how this might look).

Where are your biggest opportunities to improve your customers' experience in all phases of the flywheel? List your observations in this box:

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Choose some of the observations you made in the previous box and put them in the table below.

For each observation, list some actions you think would help your company improve along with key stakeholders you'll need to work with:

Observation	Proposed Actions	Key Stakeholders
EXAMPLE: Sales isn't contacting marketing's leads	**EXAMPLE:** Schedule a conversation between marketing and sales leadership to discuss ways to improve alignment	**EXAMPLE:** Sal (head of sales), Michelle (head of marketing)

3 Holding Your Teams Accountable With an SLA

Having a unified goal and lead definition is important, but you also need a system of accountability to make sure Marketing and Sales are completing what's expected of them. In the Holding Your Teams Accountable With an SLA lesson, you learned how to hold your teams accountable using a service-level agreement and what to do if either team falls behind. Use this section to create an SLA.

The Sales and Marketing SLA

An SLA is an agreement between a service provider and its customer that guarantees a certain output. When it comes to Sales and Marketing, this is a two-way agreement, with Marketing promising a certain number of leads to Sales, and Sales promising to contact those leads within a certain timeframe.

This activity requires your sales data for a full year, divided into quarters. Please determine the following information:

How many qualified leads did you generate?	
How many of them became sales opportunities?	
How many of those opportunities closed into customers?	
What was the value of each sale?	

Use these numbers to calculate the following key metrics:

Lead-to-opportunity conversion rate (number of opportunities divided by total number of qualified leads)	
Opportunity-to-close conversion rate (number of new customers divided by total number of opportunities)	
Average deal size (sum of all deals divided by number of deals)	

Compare different quarters of the year to see if these rates change or are steady. It's normal to have some seasonality in your sales, so be sure to take that into account as you calculate your SLA.

Fill in the numbers below:

What is your lead-to-opportunity conversion rate?	
What is your opportunity-to-close conversion rate?	
What is your average deal size?	

Calculate your SLA:

What is your revenue goal?	

NOTE: If your revenue goal is in annual revenue, divide it by 12 to make it a monthly goal.

How many deals do you need to close each month to achieve that goal?	

NOTE: Divide your revenue goal by your average deal size.

How many opportunities do you need each month to close that many deals?	

NOTE: Multiply your number of deals by your opportunity-to-close conversion rate.

How many qualified leads do you need each month to generate that many opportunities?	

NOTE: Multiply your number of opportunities by your lead-to-opportunity conversion rate.

That last number tells you the number of qualified leads Marketing needs to send to Sales each month. **That's the first half of your SLA.**

The other half is how quickly Sales contacts those leads. Remember, you want your sales team to contact leads as quickly as possible. This requires experimenting to discover what's reasonable to ask of your sales team.

If you already have a set timeframe within whichSales is required to contact leads, enter that into the SLA template below. Otherwise, use **24 hours as a starting point**. Either way, always be on the lookout for ways to reduce this number. Reducing the amount of time it takes Sales to follow up with qualified leads should be an ongoing discussion topic in your marketing meetings, particularly in the early days of your SLA (see Section 4 of this guide).

Fill in the SLA template:

Every month, Marketing will deliver _____ qualified leads to Sales, and Sales will contact each of those leads within _____ hours of receiving it.

Review at your lead qualification matrix again to see what percentage of leads in each category end up buying from you. Specifically, identify if your hand-raisers close at a different rate than your other sales-ready leads. Chances are, hand-raisers close at a much higher rate. If it's twice as much, you should allow your marketing team to count them as being twice as valuable. If it's three times as much, they should count as being three times as valuable. Whatever the case, if the conversion rates are different, you want to find a way to incentivize Marketing to focus on generating the types of leads that close at a higher rate.

You can use an average sale value to do this. Multiply the conversion rate of each bucket of leads by the average value of a sale made to one of those leads to get the value of one lead in that category. Once you have this lead value calculated, you can put Marketing on a quota, just like Sales.

In the end, you'll get something like this:

Every month, Marketing will deliver $100,000 of lead value to Sales, and Sales will contact each marketing-qualified lead within 24 hours.

If you have the data to do this, run the calculations and update your SLA below:

Every month, Marketing will deliver _____ of lead value to Sales, and Sales will contact each marketing-qualified lead within _____ hours.

The Judicial Branch

You need to organize your judicial branch to enforce the SLA. Your judicial branch will be a small group of leaders who review every lead that doesn't get contacted within the timeframe dictated by your SLA. The judicial branch will determine whether the lead was actually qualified and they will follow up with the appropriate team. If the judicial branch finds a lot of unqualified leads are getting passed to Sales, use your marketing meetings to reassess the lead qualification matrix until the problem is resolved.

For the judicial branch to be effective, its members must be unbiased and focused on what's best for the company as a whole. That means having the CMO or the SVP of Sales leading the charge is probably a bad idea, though both might be involved as members of the branch. The ultimate decision maker should be a COO or even CEO – someone whose primary interest is the success of the company and who can be trusted not to side with one team over the other.

Use the box below to brainstorm a list of people who should be involved in your judicial branch:

[empty box]

Marketing Velocity

If your SLA requires your marketing team to produce more qualified leads than they've typically produced, audit the way you're using your marketing production process, and look for ways to reallocate resources.

List all of the assets your marketing team currently produces (blogs, infographics, meet-ups, tradeshows, etc.) in the table below. For each, indicate how many of those items you produce in a typical year (volume), how many leads one item typically produces, and how many hours one item takes to produce.

In the **Leads per Hour** column, divide the number of **Leads** by the number of **Hours** to see how effective each item is compared to the time it takes to produce.

In the **Total Hours** column, multiply **Volume** by **Hours** to see how many hours per year your marketing team is spending on each item.

| Item	Volume	Leads	Hours	Leads per Hour	Total Hours
EXAMPLE: blogs	**EXAMPLE:** 200 posts	**EXAMPLE:** 0.25 per post	**EXAMPLE:** 4 hrs per post	**EXAMPLE:** 0.0625 (16 hrs per lead)	**EXAMPLE:** 800

If an item has a low number of leads per hour, consider allocating those hours to an item that has a higher number of leads per hour. Think about what's required to make that change.

Sales Velocity

Just as you were able to calculate your marketing velocity, you can also calculate your sales velocity. The formula to do this comes from "Aligned to Achieve." There are four metrics you need to identify and measure:

- **Number of opportunities.** How many sales opportunities can a rep handle in a given time period? For more complicated sales where the rep has to be deeply involved throughout the process, this number might be fairly low, but for more transactional sales, it can be fairly high. This number might also vary from rep to rep, based on how much experience they have.

- **Average deal value.** How much does a typical sale close for? This is the same key metric you used to calculate the SLA..

- **Win rates.** What percentage of sales opportunities actually close into new business? This is another metric you need to know to calculate the SLA, and it's an important one for both Sales and Marketing to keep an eye on. If this rate is low, it could be because Marketing is attracting t the wrong audience. Revisit your ideal customer profile and make sure it's accurately reflecting the type of audience most likely to close. Dig into your sales team's lost deals and see if you can find common traits that don't exist among your customers.

- **Sales cycle length**. How long does it take your sales team to turn opportunities into customers? Remember, the goal of sales enablement is to make your sales team more efficient, so this number should decrease soon.

Use these numbers and follow this formula to calculate your sales velocity:

# of Opportunities		Average Deal Value		Win Rate
	X		X	

Sales Cycle Length
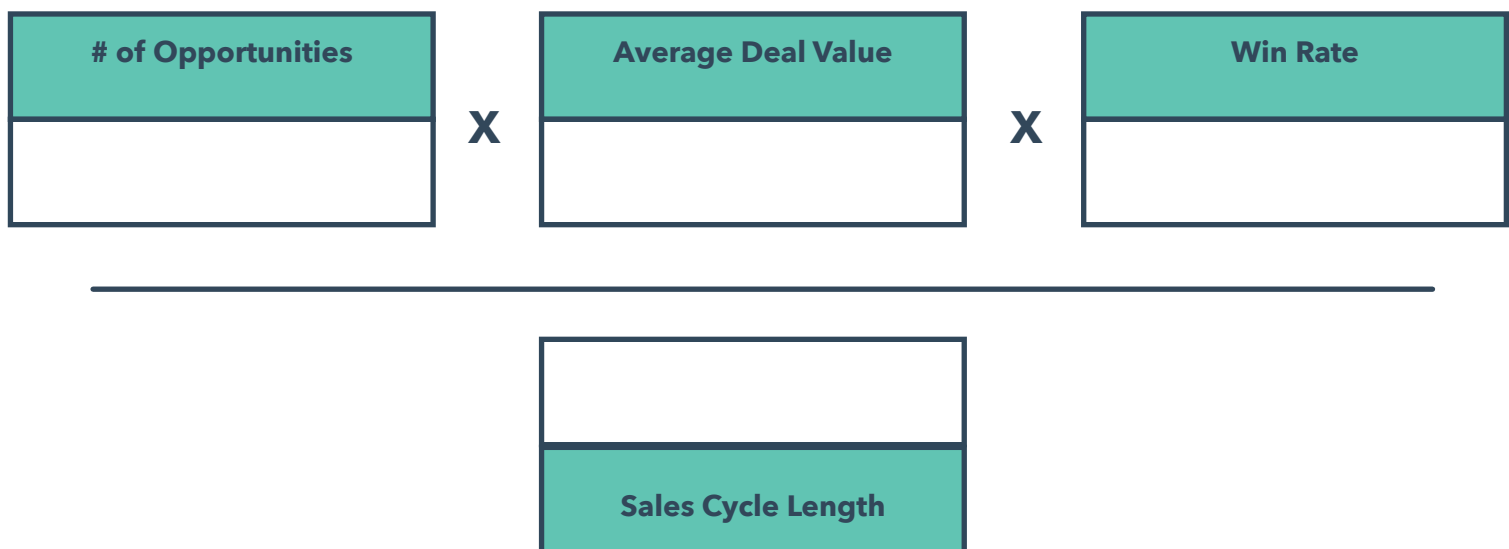
Sales Velocity = _____

4 How to Map a Sales Process

Your sales process should be the foundation of everything your sales organization does. In the How to Map a Sales Process lesson, you learned how to create a sales process that's robust enough to power your sales team's long-term growth.

Use the table below to list the most common steps of your sales process. Make the list as detailed as possible (you'll trim unnecessary steps later). Think of a typical sales cycle and write down every action your team has to take, as well as every step the prospect has to take. Be sure to label each step with the person responsible for it (sales rep, prospect, etc.). When you've written out all the steps, continue to the next activity.

ACTION	PERSON RESPONSIBLE
EXAMPLE: Schedule a sales meeting	**EXAMPLE:** Business Development Rep

ACTION	PERSON RESPONSIBLE
EXAMPLE: Schedule a sales meeting	**EXAMPLE:** Business Development Rep

Now that you've mapped a typical sale, narrow it down to the most essential steps by repeating the following three times:

1. Read through your list and ask whether each step is **required.**
   a. A required step is one you want to happen in every sale — even if a salesperson has an opportunity to skip the step, you want them to take it.
   b. **If you find a step that isn't required, cross it off.**

2. Read through your list again and ask whether each step is **factual.**
   a. A factual step is tied to a specific action, rather than being based on a feeling. For example, "Prospect attends consultation" is a factual step, but "Prospect enjoys consultation" is not.
   b. **If you find a step that isn't factual, see if you can modify it to make it factual. If you can't make it factual, cross it off.**

3. Read through your list one last time and ask whether each step is **inspectable.**
   a. An inspectable step can be verified by a record inside the CRM. If an action isn't recorded in your CRM, it doesn't count.
   b. **If you find a step that can't be recorded in your CRM, cross it off.**

You've reduced your sales process to its most essential steps. Now it's time to turn those steps into the golden combination of a rep-focused action and a buyer-focused outcome.

Add your remaining steps to the left column in the table below. Add the actions the buyer takes during each step to the right column. You can have multiple buyer actions in a row, but only put one seller action. The action in the left column should drive the actions in the right column. If they don't match up, add or remove actions until they do.

SELLER ACTION	BUYER ACTION(S)
EXAMPLE: Demo the product	**EXAMPLE:** Review the product, commit to a second meeting

That's your sales process. The actions in the left-hand column are the steps you want your sales team to take in every sale, and the actions in the right-hand column are the exit criteria for those steps. Make sure these steps are reflected in the structure of your CRM.

5 Systems Management for Ops

There are a variety of systems and tools companies can adopt to help their business grow. RevOps helps to ensure the business has all of the technology required for growth, without any unnecessary systems that can add confusion and costs. In the **Systems Management for Ops** lesson, you learned what technology is required for growth and how to avoid falling into the trap of too much tech. Asia Corbett, who's featured in the lesson, created **a spreadsheet template** to help you implement a data governance framework at your company. Use it as a starting point to organize your systems, and be sure to maintain it as your company scales.

6 Communicating the Value of RevOps to Company Leaders

As an operations professional, it's important to communicate the value of your work to company leaders. In the **Communicating the Value of RevOps to Company Leaders** lesson, you learned how to persuade your leaders that Ops needs to be a crucial part of your company's growth plan. You learned about the **Cost of Poor Quality,** and you also learned about the **A3 template**. Use this section of the workbook to develop a deeper understanding of the principles and techniques that will help you persuade people to take action.

Activity 1 | Being Honest with Yourself

In a Harvard Business Review article called, "A Survival Guide for Leaders," Ronald A. Heifetz and Marty Linsky give a lot of good advice to people who are trying to make changes at their company. They note:

If you have been with the company for some time, whether in a position of senior authority or not, you've likely contributed in some way to the current mess...

In our teaching, training, and consulting, we often ask people to write or talk about a leadership challenge they currently face. Over the years, we have read and heard literally thousands of such challenges. Typically, in the first version of the story, the author is nowhere to be found. The underlying message: "If only other people would shape up, I could make progress here." But by too readily pointing your finger at others, you risk making yourself a target. Remember, you are asking people to move to a place where they are frightened to go. If at the same time you're blaming them for having to go there, they will undoubtedly turn against you.

Take a moment to reflect on your time in your current position. Have you contributed – either intentionally or accidentally! – to any of the problems you're now trying to fix? Use this box to record your thoughts:

If you find that you've contributed to the problem in the past, that's an important thing to keep in mind. If your executives mention this, be honest and recognize that you've made mistakes in the past, and explain that you're now trying to correct them. Then ask for their help in doing so.

Activity 2 | Understanding the Opposition

Here's another quote from Heifetz and Linsky:

Change that truly transforms an organization, be it a multi billion-dollar company or a ten-person sales team, demands that people give up things they hold dear: daily habits, loyalties, and ways of thinking. In return for these sacrifices, they may be offered nothing more than the possibility of a better future...

People must also see that you understand the loss you are asking them to accept. You need to name the loss.

Think about the people your plan will affect. What are you asking them to give up? Why is it hard for them to give those things up? Use this box to record your thoughts:

Understanding what you're asking people to sacrifice will help you be more empathetic to their point of view. People will be more willing to follow suit if they believe you understand their concerns. Think about how you can help with the biggest concerns, and be sure to validate their concerns before trying to help them overcome them. For example, if you're proposing a change to your company's sales approach, your sales leaders might be worried about retraining reps, creating new processes for onboarding new reps, and a loss in productivity (and revenue!) while everyone learns the new process. Before explaining all the countermeasures you've designed to reduce these problems, say something like, **"I hear you. I know you worked hard to create the processes we have in place and that they've been serving us well for a long time. That's why I want your help in implementing these new processes. Implementing these changes is going to be a lot of work, and we'll only succeed if we work together. It might set us back from hitting our goals this quarter, but if we do it right, the payoff next quarter should be more than enough to make up for that loss. If we work together, we…."**

Activity 3 | Identifying Allies

Here's another quote from Heifetz and Linsky:

It's tempting to go it alone when leading a change initiative. There's no one to dilute your ideas or share the glory, and it's often just plain exciting. It's also foolish.

Think about who can support you in your efforts. Use this box to record your thoughts:

Activity 4 | Pre-wiring

Although your goal might be to present to the executive team as a whole, you'll make far more progress proposing your ideas to individual executives one at a time. This is known as pre-wiring.

Pre-wiring allows you to gain a sense of each person's reaction in a one-on-one setting instead of fielding them all at once. It also allows you to resolve a potential objection, before presenting to the larger group. If you can't resolve it, ask for the person's help in adjusting your proposal in a way they'd be willing to support. The goal is to gain as much support as possible upfront. That way, the meeting can be spent planning how to implement the initiative instead of discussing whether it should be implemented at all.

In his book, "The McKinsey Way," Ethan M. Rasiel describes how pre-wiring works at McKinsey and Company. He writes:

There should be no surprises on the day of the presentation. All the major players should be taken through the solution in private. This way, necessary negotiation, compromise, and new facts that are integral to the acceptance of the proposal will be integrated by the time of the presentation. Pre-wiring removes much of the risk from the presentation and allows the team to shine.

It's important to pre-wire with your allies, but it's even more important to pre-wire with your opponents, so they don't raise objections during the big presentation. Use the table below to identify people you need to pre-wire with – both potential advocates and potential opponents. Jot down notes about their relevance to your plan, their potential concerns, and what you need to ask them to do. When brainstorming concerns, try to be empathetic about their needs and goals, but be careful that these are just guesses. When you meet with each person, present your plan and ask them what their concerns are. If they raise the concerns you're anticipating, then you'll be prepared to respond. If they raise new concerns, listen to them carefully. Either way, validate their concerns and use the techniques in Activity 6 (below) to respond empathetically.

NAME	RELEVANCE	POTENTIAL CONCERNS	ASK
EXAMPLE: Renan Jones	**EXAMPLE:** Lead sales enablement	**EXAMPLE:** Change of process is hard	**EXAMPLE:** Can we work together to update sales training and collateral?

Activity 5 | Crafting a Presentation

When it comes time for you to propose your RevOps strategy to the executive team, you need to present it as persuasively as possible. That's where Monroe's Motivated Sequences comes from.

Monroe's Motivated Sequence is a five-step process for crafting a speech that encourages people to take action. Here's an overview of the five steps:

1. **Attention:** Earn your audience's interest.
2. **Need:** Describe the problem in detail.
3. **Satisfaction:** State your proposed solution.
4. **Visualization:** Describe the benefits of your solution.
5. **Action:** Ask the audience to do something.

Earn your audience's interest by capturing their attention. The best way to do this is with a clear and powerful statement. Use this box to record your ideas:

Describe the problem in detail. If you've used an A3 template to investigate the problem, you should have charts and other data to support your assessment of the problem. Use this box to list the most compelling pieces of your research:

State your proposed solution as clearly and succinctly as possible. Can you get it into a single sentence? Write a few variations in this box and then circle or underline the one you think works best:

Describe the benefits of your proposed solution. Just like you used charts and data to describe the problem, use charts and data to describe the state you want to get to. Include qualitative descriptions of how things will benefit the executives, company employees, and your customers. Use this box to record your ideas:

Ask the executives to take action. Don't shy away from this – it's the most important part of the entire presentation. What are you going to ask them to do? Use this box to record your ideas:

Determine how you'll deliver this presentation. Will you use slides? Will you have printed materials? Do you have the ability to design these things yourself, or will you need to have someone help you? Use this box to set a plan for turning your outline into a winning presentation:

Activity 6 | Winning Over the Opposition

Even if you pre-wire several of the executives, there still may be some objections during your presentation, so you need to be ready to respond. In order for your plan to succeed, you don't just need a lack of opposition – you need enthusiastic support. Here's what Heifetz and Linsky have to say about this:

The people who will determine your success are often those in the middle, the uncommitted who nonetheless are wary of your plans. They have no substantive stake in your initiative, but they do have a stake in the comfort, stability, and security of the status quo.

Winning over an objector can be an intimidating task, but it's also a learnable skill. This is covered extremely well in the book, "Buy-in: Saving Your Good Idea From Getting Shot Down" by John Kotter, who is the world's leading authority on organizational change, and Loren A. Whitehead, who is the leader of educational innovation at the University of British Columbia.

Here are some key takeaways from their book:

- **Naysayers should be welcomed to discussions and encouraged to participate.**
  - If nobody objects, chances are people aren't really engaging with your idea.
  - By overcoming objections, you'll win over anyone who's undecided.

- **Objections should always be handled respectfully.**
  - Even if the objector is combative, sinking to their level will only alienate other people.
  - If an objector is being totally unreasonable, other people will notice that on their own. You don't need to point it out.
  - You need to win hearts and minds to gain true buy-in. Simple, clear, and commonsense responses can do much to win the minds. Respect can do much to win hearts.

- **Responses to objections must be short, clear, and based on common sense.**
  - Long responses give people's minds time to wander.
  - Complicated answers add to the confusion.
  - When responding to objections, common sense is more powerful than data or lists.

- **Preparation is key.** In a world in which most preparation for buy-in deserves a C grade, B+ preparation can lead to actions that look inspired.

With that in mind, here's a list of common objections you might encounter when promoting the use of inbound techniques and sales enablement strategies.

1 | We've been successful, so why change?

It can be hard to convince people that change is needed if your company is doing well. When people raise this concern, acknowledge that your company has been successful, and explain that you're trying to increase that success. Point out that companies who don't adapt to changes in the market ultimately end up failing, and you don't want that to happen to your company. Be sure to also explain the difference between linear growth and achieving scale. Help them understand the vision you have for the company and the way it benefits them.

Use this box to record possible responses to objections based on your company's past or current success:

2 | Are you suggesting our [marketing/sales/customer service] team has been doing a bad job?

This concern is most likely to come from members of the mentioned team. Respond by complimenting their efforts and pointing out what they've done well. Then, explain how your initiatives can further drive what they've been doing well.

Use this box to record possible responses:

3 | What about this, this, this, and this...

Some people like to analyze all scenarios. Get the conversation back on track by thanking them for being invested and by asking them if they'd like to be a part of the team who finds solutions to the concerns they've raised.

Keep in mind that you don't have to answer every single objection. Your main task is to increase people's confidence in the ideas you're proposing. Objections from multiple people show they're engaged – and that's a good thing. Explain that you'll be able to resolve the concerns by working together to drive your initiative.

Use this box to record possible responses:

4 | This idea doesn't go far enough./This idea goes too far.

It's possible some leaders in your company will feel you're asking too much of them, while other leaders will feel you're not asking enough of certain people. This proves change is needed. If disagreements arise about the level of changes needed, validate that a change is, in fact, needed and that you can figure out the details at a later time.

Use this box to record possible responses:

5 | You're abandoning our core values.

Scaling a company can be scary because it often sounds like you're suggesting you give less personal attention to individual customers. In reality, you're trying to help your company better serve its customers and, by extension, be more successful and profitable. Find a way to position your strategies in that way.

Use this box to record possible responses:

6 | If this is such a great idea, why aren't more people doing it?

The Revenue Operations Certification course is full of examples from real-life business leaders who have succeeded in implementing these strategies. Choose the ones that are most relevant to your company, and find a way to share their stories in a brief, but compelling way.

Use this box to record your ideas:

7 | We tried a new sales approach once before, and it didn't work.

People may be wary of trying something new, if they recently dealt with a failed initiative. Sharing stories from real companies in the Revenue Operations Certification course can help. Be sure to also let them know of all the resources you plan to use to make this initiative successful.

Use this box to record the resources you need:

8 | How will we train everyone on the new processes?

Talk to them about HubSpot Academy and all the free courses that are available on-demand to help them.

Use this box to record HubSpot Academy courses people might need:

9 | This is a good plan, but now isn't the best time.

Don't be surprised if certain leaders want to wait until next quarter or next year to implement the strategies you've presented. Even if they're sincere in their support for the plan, postponing action will only make the transformation lose momentum. The sooner you can get changes implemented, the better.

If someone is resistant to your idea because your company has other initiatives going on, agree with them that it's impossible to implement a large number of changes simultaneously, and suggest that other initiatives should be revisited if they aren't producing results as significant as what you're trying to accomplish.

Use this box to record competing initiatives and how you can position your strategy as more urgent:

Competing Initiative	Why your strategy is more urgent

10 | We recognize there is a problem, but your proposal won't work here.

There are endless reasons someone might agree with RevOps in theory but think it's impractical in reality. They might think your company is too big, too old, and too established to make such dramatic changes – or they might think it's too small and new to implement something so rigorous. Maybe they think the industry you serve is too niche, and RevOps isn't specific enough, or that RevOps is too specific and doesn't apply to your industry. Whatever the case, you need to make sure your proposal is tailored specifically to your company. If you've used your A3 template to design a plan and garner support from other company leaders, you should be able to point to specific parts of the plan that are unique to your company.

Use this box to record reasons that RevOps is especially relevant to your company:

11 | This is too complicated – there's no way we can do this.

Share how RevOps streamlines the way individual teams do their jobs. Have a few examples of how your strategy will simplify the daily jobs of marketers, salespeople, and customer service representatives.

Use this box to record ideas:

12 | This might work at other places, but it won't work here because we're different.

Marcus Sheridan addresses this concern at length in his book, "They Ask, You Answer." Here's a snippet:

Ahh yes, the "we're different" phenomenon. Funny thing is, I've polled live audiences all over the world, asking thousands of people this one simple question: "How many of you, by a show of hands, believe your business is quite different than the rest of those in the room?" And what do you think the results of this question are? If you guessed 100 percent, you're right. Everyone thinks their business is different. Everyone. Oddly, no one ever says, "Actually, Marcus, we're just like that company over there. . . ."

If one looks at the psychology of this response, the reason why 100 percent of people truly believe their business is different is because they want to feel special. Whether we want to admit it to ourselves or not, this need to feel special runs deep in the world of business.

But, that's the thing. We're not special, at least in the most fundamental sort of the word. Case in point: When I was busy leading the life of a pool guy, my business and sales success were, ultimately, built on one thing: consumer (buyer) trust.

Then, after I moved on from being full time with River Pools and Spas (to become what is today a silent partner) and started my sales and marketing company, the Sales Lion, once again, I found my business and sales success was built on that same factor: trust.

Fact is, every business has a single tie that binds them all together when it comes to consumers and buyers, and that is trust. And the companies that embrace this reality, and let go of the obsession that "we're different" and instead focus on the fact that they are fundamentally the same, that's when great things are brought to pass. [...]

So whether you're B2B or B2C, local or national, a service or a product, or whether you're big or small: don't put yourself in the "different" corner. Bring it back to the basics. Bring it back to trust. That's the business we're all in.

Use this box to brainstorm responses to concerns from people who think your company is too different to benefit from your ideas:

13 | This change is too big and will be too much work to implement.

This objection is mostly likely to come up if your company has been in business for a while and has well-established processes (even if those processes are suboptimal). For example, if you have salespeople who have been selling for your company for a long time, sales leadership might worry about the difficulty of retraining them. The best way to combat this objection is to find a salesperson who is willing to experiment, and work with them to try some new techniques, so you have results to present to the rest of their team. If salespeople see a team member having success, it'll be easier to persuade them to try the techniques that are driving that success.

Use this box to record ideas of how to get allies from the departments you think will be hardest to change:

If somebody catches you off guard, that's okay! Admit that you haven't considered their point yet, and reassure them that every other obstacle you've encountered has been resolved, so this one can be, too. Then, promise to look into it and get back to them.

Activity 7 | Avoiding a Backslide

After your RevOps strategy is implemented, you have to work to keep people from regressing into the old status quo. This is especially true for executive leaders, since they may not be directly involved in your strategies. The key is to keep them engaged as the strategy unfolds.

There's a Harvard Business Review article by W. Chan Kim and Renee Mauborgne titled "Tipping Point Leadership" that talks about William Bratton, an individual who made a career of turning around failing police departments. Here's a segment that is pertinent to keeping leaders engaged:

> One way Bratton solves the motivation problem is by singling out the key influencers – people inside or outside the organization with disproportionate power due to their connections with the organization, their ability to persuade, or their ability to block access to resources. Bratton recognizes that these influencers act like kingpins in bowling: When you hit them just right, all the pins topple over. Getting the key influencers motivated frees an organization from having to motivate everyone, yet everyone in the end is touched and changed. And because most organizations have relatively small numbers of key influencers, and those people tend to share common problems and concerns, it is relatively easy for CEOs to identify and motivate them.
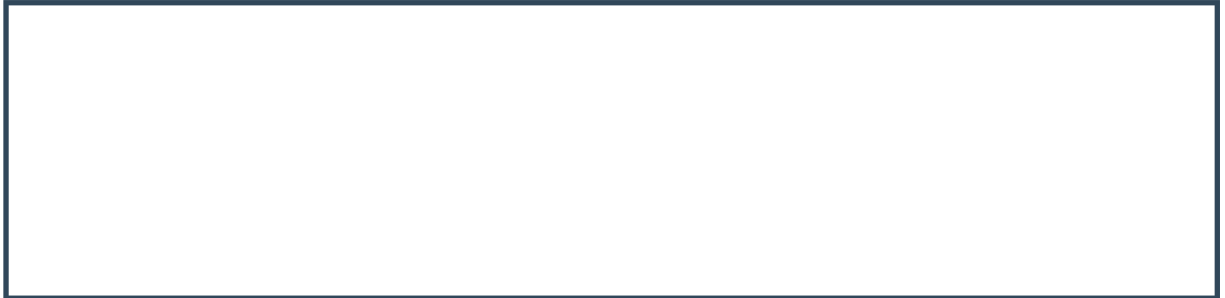
> Bratton's approach to motivating his key influencers is to put them under a spotlight. Perhaps his most significant reform of the NYPD's operating practices was instituting a semi-weekly strategy review meeting that brought the top brass together with the city's 76 precinct commanders. Bratton had identified the commanders as key influential people in the NYPD, because each one directly managed 200 to 400 officers. Attendance was mandatory for all senior staff, including three-star chiefs, deputy commissioners, and borough chiefs. Bratton was there as often as possible.

> At the meetings, which took place in an auditorium at the police command center, a selected precinct commander was called before a panel of the senior staff (the selected officer was given only two days' notice, in order to keep all the commanders on their toes). The commander in the spotlight was questioned by both the panel and other commanders about the precinct's performance. He or she was responsible for explaining projected maps and charts that showed, based on the Compstat data, the precinct's patterns of crimes and when and where the police responded. The commander would be required to provide a detailed explanation if police activity did not mirror crime spikes and would also be asked how officers were addressing the precinct's issues and why performance was improving or deteriorating. The meetings allowed Bratton and his senior staff to carefully monitor and assess how well commanders were motivating and managing their people and how well they were focusing on strategic hot spots.

> The meetings changed the NYPD's culture in several ways. By making results and responsibilities clear to everyone, the meetings helped to introduce a culture of performance. Indeed, a photo of the commander who was about to be grilled appeared on the front page of the handout that each meeting participant received, emphasizing that the commander was accountable for the precinct's results. An incompetent commander could no longer cover up his failings by blaming his precinct's results on the shortcomings of neighboring precincts, because his neighbors were

in the room and could respond. By the same token, the meetings gave high achievers a chance to be recognized both for making improvements in their own precincts and for helping other commanders. The meetings also allowed police leaders to compare notes on their experiences; before Bratton's arrival, precinct commanders hardly ever got together as a group. Over time, this management style filtered down through the ranks, as the precinct commanders tried out their own versions of Bratton's meetings. With the spotlight shining brightly on their performance, the commanders were highly motivated to get all the officers under their control marching to the new strategy.

Use this box to record ways to keep your company's key influencers engaged:
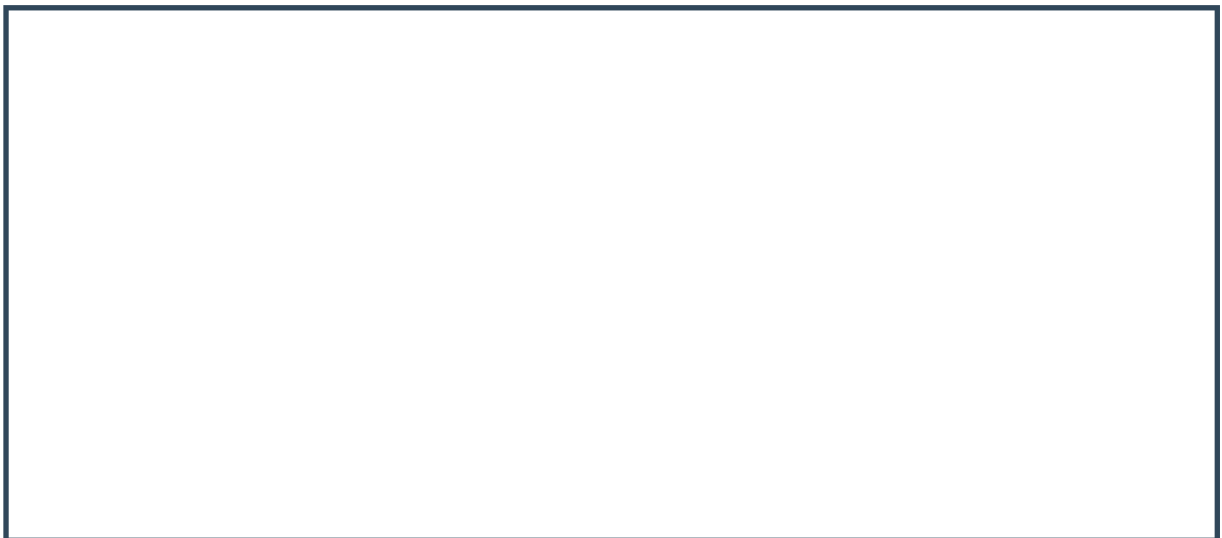
7 Structuring Your RevOps Team

Strategically structuring your people and teams is crucial to successfully implementing RevOps concepts in your organization and the enablement of cross-functional collaboration around your processes, systems, and data.

In the Structuring Your RevOps Team lesson, you learned how to structure your go-to-market operations teams to successfully implement RevOps in your organization. In this section of the workbook, you'll diagram the current structure of your team as well as the ideal operations team structure for your organization and start formulating a plan for getting from your current to your ideal state.

Use the box below to draw your company's org chart. As you do that, think about your silos and highlight places where alignment breaks down.

In order for you to make change happen, you need to think about your silos. You need to think about how you organize. You can do that formally, through a reporting structure to an experienced operations leader, or informally, through establishing a regular operating cadence during which the leadership for these operations organizations can come together and make decisions. With that in mind, use the box below to draw your ideal org chart:

What changes do you need to make in order to get from your current org chart to your ideal org chart? What order do those changes need to happen in? Record some notes here:

Who at your company do you need to get buy-in from to make these changes? Record some notes here:

8 Hiring RevOps Team Members

Whether you're a single RevOps professional who needs to bring on additional help, or you already lead a team and are looking for best practices to guide you, you need a hiring strategy. In the Hiring RevOps Team Members lesson, you saw actionable tips and real-life examples to help you find and secure the teammates who will help your company achieve its goals. Use this section to develop a hiring strategy for your department.

Defining Roles

Before you start looking for someone to hire, you need to assess how well your team is functioning. This is true even if you're currently a team of one person.

Use the table below to list your team's main responsibilities. In the first column, name or describe the responsibility. In the second column, list the necessary skills to fulfill that responsibility. In the "Performance" column, write "Satisfactory" if you're satisfied with how your team is fulfilling those responsibilities, and write "Unsatisfactory" if you aren't satisfied. If there are any responsibilities your team doesn't currently own but you'd like your team to take on, add those to the list with their relevant skills, and put "Null" in the Performance column.

RESPONSIBILITY	SKILLS	PERFORMANCE
EXAMPLE: CRM administration	**EXAMPLE:** CRM knowledge, light coding ability, basic API comprehension	**EXAMPLE:** Unsatisfactory

Now, think about what's holding your team back from fulfilling each responsibility rated "Unsatisfactory" or "Null." Here are some possibilities:

- Your team has too many responsibilities and too few people. You don't have enough time to adequately perform these responsibilities. **Hiring is a good solution to this problem.**

- Your team is lacking the necessary skills or expertise to excel at these responsibilities. **Hiring may be a good solution to this problem, but there are other possible solutions like training, partnering with other teams internally, and consulting with external experts.**

- Your team lacks the necessary resources to fulfill these responsibilities because your company isn't making a sufficient investment in RevOps. **Hiring probably won't solve this problem.**

Review the responsibilities rated "Unsatisfactory" or "Null" and consider whether hiring is a good option to improve performance. If it is, use the table below to develop some roles that you could hire for. You can combine multiple responsibilities from the table above into a single role in the table below, or you can create separate roles for each responsibility. Include the necessary skills for the responsibilities in this table as well. If multiple responsibilities draw on the same skill or skills, that implies those responsibilities can be combined into a single role.

ROLE	RESPONSIBILITIES	NECESSARY SKILLS
EXAMPLE: System admin	**EXAMPLE:** CRM administration, tech stack management	**EXAMPLE:** CRM knowledge, light coding ability, basic API comprehension, systems management experience, ERD knowledge a plus

Sourcing Candidates

As you think about recruiting job candidates for these roles, you need to know what you're looking for.

Look at each of the roles you've defined and answer these questions:

1. **How many responsibilities will this role take on, and how closely related are they?**
   If the role will only entail one or two main responsibilities, or if the role's responsibilities all draw on a short list of skills, you can say the role has specific responsibilities. If the role has a long list of responsibilities requiring a wide variety of skills, you can say the role has broad responsibilities.

2. **How important is it that a candidate has direct experience with these responsibilities?**
   A candidate who has previously fulfilled the responsibilities associated with the role has direct experience. A candidate who hasn't previously fulfilled the exact responsibilities you've described but who has demonstrated the necessary skills to perform that role has transferable experience.

As you answer these questions for each of the roles you defined, plot the roles on the quadrant below:

Direct Experience

Specific Responsibilities

Broad Responsibilities

Transferable Experience
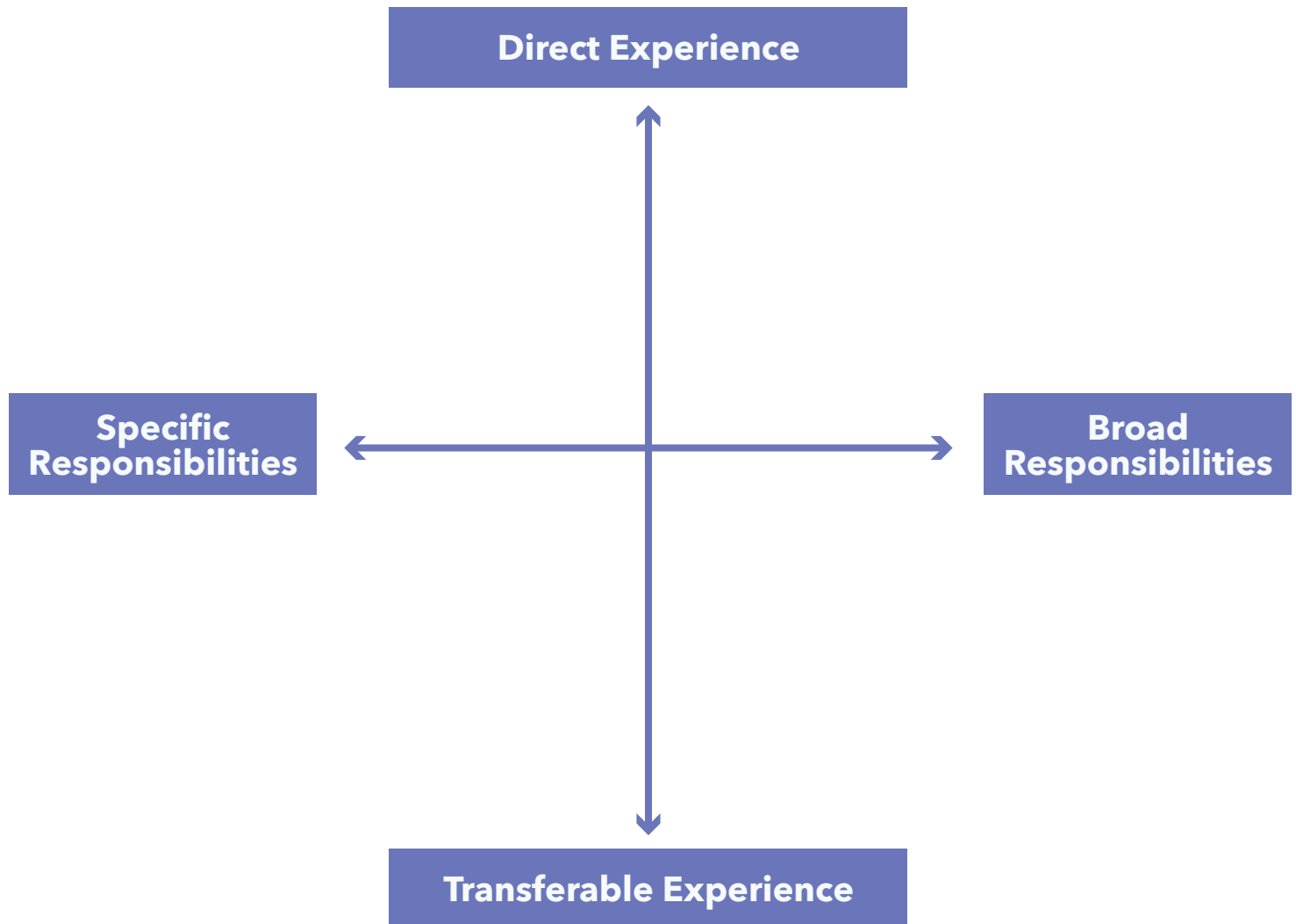
In many cases, there's a trade off between specificity of responsibilities and the number of open roles. For example, there is very little overlap in the skills required for a financial analyst role and a CRM admin role. If you need both responsibilities fulfilled, you can either create two separate roles, and look for people with direct experience (one person who has financial analysis experience and one person who has CRM admin experience), or you can combine them into a single role, and look for a single person who has transferable experience – like an accountant who also worked in systems management. As you do this, you'll have fewer dots on the quadrant, and they'll move more and more to the right side (because you're requiring candidates to take on broader responsibilities). Give yourself permission, or even encouragement, to move downward in the quadrant. Finding someone with the necessary skills to take on multiple responsibilities will be much easier if you aren't as concerned about the context they developed those skills in.

Once your roles plotted in the quadrant, you can decide what type of candidates you need:

1. **Top Left Quadrant:** Seek out credentialed specialists if there's a specific responsibility you need an experienced person to take on. These are people who are certified in their ability to do specific tasks, and they'll be best for a role in this quadrant. Focus on industry standard credentials that show a candidate can do the job and has experience using those credentials.

2. **Top Right Quadrant:** *Seek out experienced operations leaders* if there are several responsibilities you need someone to take on and you want them to have direct experience with those responsibilities. These are people who have extensive operations experience and have a proven track record of handling multiple responsibilities. Seek out people who have held the role you've described at a company in the same stage of growth that your c company is currently in. You may have to do some headhunting to pull viable candidates away from their current companies. As an alternative, consider moving the role down to bottom right quadrant.

3. **Bottom Right Quadrant:** *Seek out transitioning generalists* if there are several responsibilities you need someone to take on, and you're less concerned about the context where they developed their skills. These are people who have the skills necessary to succeed in the role but who don't have experience in the specific role you've created. Think creatively about the types of roles that would involve the skills you've identified as necessary, then source candidates who have excelled in any of those roles.

4. **Bottom Left Quadrant:** Placing roles in this quadrant isn't recommended. If you're going to give someone a narrow focus in their responsibilities, you should look for some sort of credential or experience to show that they'll succeed in that role.

ROLE	TYPE OF CANDIDATE
EXAMPLE: System admin	**EXAMPLE:** Credentialed Specialist

Designing a Skills Assessment

Review the skills you listed for each role. How will those skills be used in the day-to-day responsibilities of the job? Think of some real-world tasks that require those skills, and then think of a way to simulate those tasks. If you had each candidate do that simulated task, how would you assess their performance? Capture some ideas in the table below.

SKILL	TASK	ASSESSMENT
EXAMPLE: Basic API comprehension	**EXAMPLE:** Evaluating system integrations	**EXAMPLE:** Run a test call

Planning an Interview

You need a standardized set of questions to ask each candidate. This makes it easier for you to compare candidates and identify the strongest one. Think about the attributes (skills, expertise, experience, qualities, etc.) that directly contribute to a candidate's ability to fill the role you've defined. Then, develop questions to identify whether each candidate has those attributes, skills, and experience. For each question, give yourself an example of good, fair, and poor responses, so you have a point of comparison for grading purposes.

ATTRIBUTE	QUESTION	GOOD RESPONSE	FAIR RESPONSE	POOR RESPONSE
EXAMPLE: Systems management experience	**EXAMPLE:** Describe a time when you've had to manage multiple systems and make them work together.	**EXAMPLE:** In my last role, I managed X systems, reduced the tech stack cost by Y%, and built a custom integration between systems A and B.	**EXAMPLE:** In my current role, I became the go-to person for tech stack questions. It wasn't my official job, but I solved X problem and improved Y performance by doing Z.	**EXAMPLE:** I like computers, and my mom often calls me when she has trouble with her email.

9 Evaluating and Iterating Your RevOps Strategy

Your RevOps strategy is always evolving. In the Evaluating and Iterating Your RevOps Strategy lesson, you learned how to evaluate and improve what you're doing, so you can keep your company's growth on track. Use this section to help plan for the future.

Describe the long-term vision you hope RevOps will help your company achieve:

What progress do you need to make in the next 12 months? How will you measure your progress? What does success look like? Break it into quarterly goals:

	GOALS	METRICS	SUCCESS
THIS QUARTER			
NEXT QUARTER			
THE QUARTER AFTER			
FINAL QUARTER			

For this quarter's goals, what do your daily priorities need to be?

How will you know if something in your strategy needs to change? How often will you assess your progress?

Conclusion

Congratulations on reaching the end of the RevOps Workbook! We hope it gives you a solid foundation for implementing or improving your RevOps strategy. Revisit the activities in this workbook on a quarterly basis to find opportunities to iterate on the measures you've put in place. And be sure to join the RevOps & Operations group in HubSpot Community. There, you can converse with other operations professionals about RevOps best practices so you can learn from them, and they can learn from you.

If you haven't already, be sure to take the Revenue Operations Certification exam. Once you pass, you'll be awarded a certificate demonstrating your understanding of the fundamental principles of RevOps and your readiness to fulfill the responsibilities of a RevOps professional.

Thank you so much for joining us! We wish you the best of luck moving forward!

Congratulations On Your Completed Workbook!

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