

# What's Working IN REVENUE OPERATIONS?

Successful RevOps Teams Treat  
Every Lead Like Gold To Enhance  
The Customer Experience

DEMAND GEN<sup>®</sup>  
REPORT

SPECIAL REPORT

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# Introduction

The disruption of COVID-19 has slowed a lot of pipeline and frozen deals for many B2B organizations. As a result of this, sales and marketing organizations and revenue teams are focusing more on their customer base and maximizing efficiency with their lead flow. Both of these developments have made revenue operations a bigger priority. And companies that have done so are already seeing significant results.

Latane Conant, CMO at **6sense**, said that when she invested in a revenue operations solution and process, the company's pipeline doubled, in part because they had access to deeper levels of insight that were synchronized across teams. Instead of working on siloed goals, the entire organization received notifications about customers at the exact same time, allowing them to respond to a customer's needs in real time. "I really believe that our RevOps team owns the ability to provide those insights," she said.

Conant spoke about the importance of revenue operations allowing both sales and marketing teams to gain a complete view of the customer and empowering sales teams to deliver relevant experiences at every digital touchpoint.

"One thing I believe is that if you want to have a great customer experience, you have to enable your employees," she said. "In my last company, we called it the 'Virtuous Cycle.' It starts with your employees and if they have consumer-grade technology at work, if they have access to insights that they need to make decisions in real time and you enable agility, you will innately be able to deliver a great customer experience."

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**LATANE CONANT, 6SENSE**



# Not Just Sales Operations 2.0: Revenue Operations Prizes Leads

Operations teams have traditionally been present in the form of marketing operations and sales operations, but not always as a single, comprehensive unit that focuses primarily on providing a customer experience that drives revenue — a key aspect of keeping the customer base alive and well.

Revenue operations is growing quickly across the B2B space. According to a [report](#) released earlier this year, the title of “Director of Revenue Operations” has risen 68% faster than “Director of Sales Operations.”

“What we’ve seen with our customers is that they’re really focused on RevOps as a function, because as we start to see recession-like things start to happen in the economy, every lead is going to be gold,” said Don Otvos, VP of Revenue Operations at [LeanData](#). “You want to make sure that your revenue operations function is strong, and they have the right processes in place to make sure that, when you do get a lead, it goes to the right rep that you’re messaging and the content that you’re using is relevant, and is going to force a call to action by the person that you’re working with.”

Revenue operations allows organizations to focus on customers in a proactive, not a reactive way. Jeff Pedowitz, CEO of [The Pedowitz Group](#), had a succinct way of putting it: “If you rethink how those groups — sales operations, marketing operations and customers success teams — can come together to drive more synergies and be more customer-focused and strategic, you can actually start to be more proactive instead of reactive. So instead of running the organization from an efficiency standpoint, you’d be running it from an ROI perspective.”

# The Upsides & Potential Challenges Of Implementing RevOps

DON OTVOS, VP OF REVENUE OPERATIONS, LEANDATA



In an uncertain world, leads are more precious than ever, because ROI is a key metric that organizations live by. It's also critical to drive alignment across teams to make sure everyone is on the same sheet of music. This means facilitating good internal communication and trust in order for all departments to function as one unit and deliver the best customer experience possible.

*Demand Gen Report* spoke with Don Otvos, VP of Revenue Operations at LeanData, to discuss how revenue operations has changed over the last several years, and how organizations can benefit from a unified revenue operations strategy.

***Demand Gen Report: Revenue operations seems to be quickly moving past the buzzword stage, showing increasing signs of adoption within B2B orgs. What, in your opinion, is the current state of RevOps in B2B today?***

**Don Otvos:** The way that I see it, RevOps is now the evolution. Whereas maybe five or ten years ago, sales ops was the cool buzzword that everyone was talking about. RevOps is now an evolution of sales ops, which is a function under revenue. It is now a function that touches everything from marketing, finance, sales, customer experience, customer success and even product. RevOps is really the function that owns the customer, because you want to have somebody in an organization and a function that makes sure that that customer journey is fantastic, as they go from a marketing prospect to a sales opportunity to becoming a customer, and then as a future customer upgrading to new products or renewing the service they have.

***DGR: Tell us about the benefits of implementing a RevOps model. What led LeanData to “sip their own champagne” and implement the model within your business? Can you share any short-term and long-term results?***

**Otvos:** LeanData’s CEO [Evan Liang] had a really strong vision of understanding the RevOps function. When I joined, I was very much aligned to his vision, so it was very easy to come in and discuss the things we need to make sure that we’re doing right. When you implement a RevOps model as an umbrella over all the different organizations in your company, so you have everyone singing the same hymn. When you have that happen, it has enabled us to really accelerate deals and drive growth in our organization. It’s not everyone operating in silos.

We know RevOps is responsible for making sure that the handoff between marketing and sales is seamless. Once somebody becomes a customer or enters our customer success organization, there’s a smooth handoff between our success team, implementation team and our solutions consultant team. It’s not about having the customer success team start from scratch. They have a full understanding of what’s happened to the process because RevOps is able to find that for them and say, “Hey, here’s what the customer journey has been for this customer as they enter your organization. When that happens, as a customer experiencing that, it becomes the most ideal customer journey you can have. They have that positive experience, they’re going to continue working with you, they’ll review your service and they’re going to want to buy more products. And if they leave that company go somewhere else, they’ll remember that experience.

***DGR: Alignment is a critical element of RevOps success. What are the challenges of this? Are there any specific aspects that hinder or slow down the adoption process?***

**Otvos:** Since RevOps cuts across different organizations, you need to make sure that everyone is aligned and communicated when you’re trying to make changes. Sometimes you may not be able to move as fast as you’d like to because you do need to make sure that every one of those stakeholders are included in the conversation, and their opinions are validated when you bring them into the decision-making process. The biggest thing is getting all those people aligned and on the same page, so everyone agrees on a timeline, milestones and check ins.

That piece of it can be hard because RevOps is sometimes a new concept for these teams. For them, it’s like, “Wait, I need to trust this new group to do the right thing.” It requires losing a little bit of control and placing that trust in something that you’ve not had experience with before. So that’s been the biggest thing: Managing the communication, the change management, and then building that trust as we take on these projects.




# RevOps Takes Sales & Marketing Alignment To New Heights

In this age of uncertainty, it may seem that organizations are pivoting to a revenue operations strategy because RevOps is a buzzword in the B2B sphere. But in reality, the concept of revenue operations represents a trend that developed over a longer period of time of sales and marketing needing to work more closely together. The most familiar term for this is “alignment.” But revenue operations has moved beyond aligning sales and marketing to include customer success teams — all functioning as a singular unit around a single goal.

“The centralized operations team started with me and then grew to 30 people or so,” said Jake Randall, Area Director, North Central at **Okta**, who has generated 50+% year-over-year revenue growth with a RevOps model. “I was the only person that had this business operations title and scope at the time eight years ago, and I was responsible for hiring roles like the Director of Sales Operations and Director of Customer Success Ops. While we built out this unified operations team, we ensured all operations roles had functional alignment with their business units to support them effectively. But, ultimately, as we were building out our RevOps team, we made clear that operations was a standalone function and team – this was part of the interview process, quite frankly. And part of our charter was helping people understand what we were trying to do and how we were trying to look at things holistically and break down those common silos in B2B that commonly stand in the way of growth.”

Revenue operations goes several steps further, however. It’s not only about alignment, it’s about deeper integration — an integration that includes sharing unified data across teams with the shared goal of focusing on the customer.



“Revenue operations came from this idea of how sales and marketing work together together,” said Dave Lewis of **Demand Gen**. “Revenue operations is really a term that came around ‘let’s label what this integration should look like.’ It was a rebranding of sales and marketing alignment on steroids.”

Jon Russo, Founder and CMO of **B2B Fusion**, noted that revenue operations shouldn’t just focus on the customer; he stressed it could be very useful as a reporting tool to figure out next steps in an organization’s strategy. “Where I see revenue operations sitting is taking a broad view of the entire company as a business operation and seeing what’s working and what’s not from a sales, marketing and customer success perspective. I don’t see it necessarily impacting the customer experience as much. I see it more as a reporting function that helps guide the organization on what’s working or what’s not ... or informing what the customer experience could be.”

Otvos added that getting his teams on the same sheet of music in terms of data was key to success. “What my team has done, one of the first projects we did was look at the data that we have in Salesforce and align everybody with the same information. So, when we’re looking at a specific number, it’s the same data point. We made sure that everyone on the same page around the data that we were looking at.”

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**JON RUSSO, B2B FUSION**



# Organizations Must Center Around The Customer To Increase Revenue

One of the principal functions of revenue operations is to place the customer front and center, because most revenue comes from existing customers.

“The ultimate goal [for RevOps] is customer satisfaction,” said Lewis. “Right next to that is revenue. If you don’t have great customer satisfaction in this day and age, you’re going to lose revenue as fast as you’re generating it because your customers will go to your competitors.”

Pedowitz stated that RevOps is one of the pillars that allowed B2B companies to make structural changes centered on the customer in a similar way that B2C companies provide nearly identical experiences across channels.

“Customer service and customer centricity are not the same thing,” said Pedowitz. “Customer service is reactive, and customer centricity is proactive. Customer centricity is designing your systems, products and processes around customers.”

Otvos agreed, stating that revenue operations goes deeper, ensuring that each individual team doesn’t have to start from the beginning with siloed data. With revenue operations fully in place, teams can function as a relay race, passing the customer like a baton closer and closer to the finish line without any interruptions in service or experience.

“RevOps is responsible for making sure that the handoff between marketing and sales is smooth and seamless,” he said. “Once somebody becomes a customer and someone enters our customer success organization, there’s a smooth handoff, so it’s not like the customer success team is having to start from scratch. They have a full understanding of what’s happened in the process because revenue operations is able to find that for them and say, ‘Here’s what the customer journey has been for this customer as they enter your organization. And then when that happens, it becomes the most ideal customer journey you can have.’ And when customers have that positive experience, they’re going to continue, they’re going to review their service, and they’re going to want to buy whatever product you’re selling.”





# Prioritize Greater Leadership Buy-In For RevOps To Work

The integration and alignment that a successful RevOps organization needs requires buy-in from leadership, and a marketing executive needs to create a persuasive argument as to how and why it could work for their organization.

“No matter what you’re doing, if you can’t get your leadership aligned, it’s dead on arrival,” said Pedowitz. “It’s essential to have executives on board to drive something like revenue operations.

“It’s about what’s right for the customer and what’s right for the business,” Pedowitz continued. “The savvy marketer can paint a picture of the before and after of what the RevOps business can look like. And really think about how each stakeholder involved can benefit from that. You have to show them their jobs don’t go away but show them how their lives would improve.”

By investing in RevOps capabilities, marketers have a unique opportunity to implement changes that can make drastic improvements to their ROI capabilities. B2B marketers can and should cover the following bases before pulling the trigger on a RevOps plan:

- Align leadership by demonstrating how revenue operations will change your organization for the better;
- Understand that RevOps should have the goal of empowering sales teams to reach out to customers at various digital touchpoints with relevant information; and
- Understand RevOps is deeper than a simple alignment. It’s a true integration of sales, marketing and customer service teams. Seek out vendors and solutions that will be able to seamlessly integrate all these capabilities.



Otvos is optimistic that revenue operations will continue to blossom as companies use those capabilities to leverage multiple touchpoints to create an immersive customer experience.

“I think as a company brings on that role of revenue operations and the organization touches different functions, the structure and the rhythm that that RevOps team can bring will just continue to grow,” he said.

As many organizations are in a period of transition, now is the time to look into whether RevOps could be right for them. In an attempt to maintain or even increase ROI, many sales teams and customer service teams are already looking to focus on their existing customer base. It may make sense to take an already existing tactic — doubling down on customer satisfaction and prizing leads — and lifting it to another level of an organization-wide structure that unifies teams with accurate data under one set of goals. It may not be recession-proof, but it is a strategy that can mitigate loss and promote revenue growth in the future.

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**JEFF PEDOWITZ, THE PEDOWITZ GROUP**



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669.600.5676

[MARKETINGTEAM@LEANDATAINC.COM](mailto:MARKETINGTEAM@LEANDATAINC.COM)



*Demand Gen Report* is a targeted online publication that uncovers the strategies and solutions that help companies better align their sales and marketing organizations, and ultimately, drive growth. A key component of the publication's editorial coverage focuses on the sales and marketing automation tools that enable companies to better measure and manage their multi-channel demand generation efforts.

201.257.8528

[INFO@DEMANDGENREPORT.COM](mailto:INFO@DEMANDGENREPORT.COM)



**MARJORIE ROMEYN-SANABRIA**



is a journalist and content creator who covers the B2B martech space. She likes the news, languages, and politics. She lives in New York.