



# WHAT'S WORKING IN REVENUE MANAGEMENT & METRICS?

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Increased RevOps Adoption Creates Need For  
Stronger Data Practices

# INTRODUCTION

By 2026, **Gartner** forecasts that 65% of B2B sales organizations will transition from intuition-based decision making to data-driven decision making, deploying technology that unites workflow, data and analytics. As such, many companies are turning toward revenue operations (RevOps) to unite data across teams and better operationalize revenue strategies. In fact, **nearly half (48%)** of companies currently leverage a RevOps approach, and **an additional 11%** plan to adopt a RevOps strategy throughout 2023.

While the description of RevOps varies, Gartner's "**Implement The Revenue Operations Model**" defines it as, "an operating model that enables organizations to run their business as an interconnected, end-to-end revenue process across go-to-market (GTM) functions." With that in mind, it's essential to ensure that all teams involved in RevOps can access actionable pipeline data to accurately determine where key accounts are in the funnel.

To that end, practitioners are knocking down the silos that currently separate departments to promote collaboration and better measure the success of RevOps processes.

"When you talk about RevOps, it's important to make sure that you're incorporating sales, marketing and customer success, not just marketing," explained Gina Miller, General Manager at B2B consultancy **Unreal Digital Group**. "It is important to unify this trifecta when interacting with prospects and clients."

As B2B sales and marketing leaders work to tighten the lens on valuable customer insights across all stages of the buyer's journey, this report outlines how organizations are working to achieve full-funnel accountability across RevOps. Specific topics of discussion include:

- The more technical focus marketers are putting on their internal RevOps teams;
- How to ensure RevOps stakeholders have access to the data needed to execute their responsibilities efficiently;
- The new metrics and benchmarks practitioners are leveraging to measure the success of their strategies;
- The technologies practitioners are implementing to aid RevOps efforts and how companies are increasing their reliance on automation; and
- First-hand accounts and case studies from companies successfully enabling cross-departmental RevOps strategies.



# LEVERAGING TECHNOLOGY AS A REVOPS ENABLER

As RevOps takes a more prominent and defined role in B2B marketing, there is an increased demand on scaling successful initiatives. This requires a greater emphasis on automation, explained Michael Davis, SVP of Technology and Data Strategy at [Shift Paradigm](#), a B2B consultancy.

“Organizations have a large number of touchpoints,” Davis continued. “They send many emails, text messages and in-app engagements to their customers. The challenge is that manually running through that process is time-consuming, costly and requires many people. However, implementing automation helps you increase efficiency and spend less money.”

One example of technology being used cross-functionally is the broad way that conversation intelligence is being leveraged across the GTM organization, according to Mallory Lee, VP of RevOps for [Nylas](#), a development platform.

"These tools initially gained popularity to help sales reps and their leadership record calls for coaching," Lee explained. "RevOps teams can leverage powerful analytics to understand how strategies and initiatives are influencing growth. This may include evaluating a customer response rate, a win rate or the success of moving onto the next desired state in the sales cycle."

Many RevOps teams include responsibility for CRM administration. According to Lee, several new RevOps tools have emerged over the past 24 months that are geared toward automating data. As CRMs are "more bloated than ever," Lee added, these technologies seek to help teams move faster and provide more clarity by supplying a blueprint of how all the metadata works together. With that information in hand, stakeholders can see the kind of impact their work potentially has on win rates.

## **Proof Point**

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**Pluralsight**, a workforce development company, was faced with lower growth than expected and wanted to uncover what behaviors led to consistent, predictable revenue. When the company realized its CRM was filled with low-quality data and inconsistent execution from sales reps, Pluralsight turned to a RevOps automation platform to bridge those gaps. As a result, the company:

- Surfaced buying group insights on win-rates, deal size and expected value;
- Established leading indicator benchmarks; and
- Sourced more than 460,000 historical, pre-engaged contacts from more than 280 sales reps.





## ‘EVERY DOLLAR NEEDS A PURPOSE & PROVEN OUTCOME’

With Nani Shaffer, CMO of Channel99

RevOps’ main goal is to optimize the revenue potential for B2B businesses, and it’s important companies gain more meaningful and accurate insights into which investments reduce dollar inefficiencies, lower customer acquisition cost and more predictably exceed sales pipeline numbers. To dive deeper into the world of RevOps measurement, the *Demand Gen Report* team sat down with Nani Shaffer, CMO of [Channel99](#), a platform for B2B businesses that unites marketing and finance teams to improve the value of marketing investments more effectively.

***Demand Gen Report:*** *In your opinion, what’s currently working in revenue metrics and management?*

**Nani Shaffer:** First, I think it’s heartening that we think about the concept of revenue metrics at all — those that extend beyond the bounds of and sit across marketing, sales and finance. I’m particularly energized by two types of metrics:

1. Customer, such as lifetime value and acquisition cost; and
2. Digital, such as return on ad spend and channel conversions.

While we need to understand how we can acquire and retain customers, we also need to focus on how and what brought them to us in the first place.

## CHANNEL99

**DGR: What steps can organizations take to ensure all relevant stakeholders have access to the data needed to execute their responsibilities efficiently?**

**Shaffer:** Organizations should set up flexible dashboards and reports with relevant stakeholders in mind. Data and reporting dashboards are typically set up for one audience (the one building them) and tend to only reflect information important to their particular role. Creating a universal set of reports and dashboards will help all stakeholders view the data in its entirety, not just zoomed in on one section.

**DGR: What are some of the new metrics and benchmarks practitioners are leveraging to measure the success of their RevOps strategy?**

**Shaffer:** For the past couple of decades, particularly with the rise of digital channels, we have been fortunate to get access to more and more (and more) data. The challenge now is twofold: Making sure that data is accurate and actionable. More practitioners are digging beyond blanket metrics like “direct traffic” to really understand what channels and vendors are driving the traffic that matters — those from key accounts in your total addressable market.

By identifying the channels that are driving traffic most likely to interact and convert, RevOps can provide teams with the data they need to make informed decisions about marketing and sales investments.

**DGR: What are some data strategies you recommend practitioners implement to ensure data remains clean and up to date?**

**Shaffer:** This is an age-old question that plagues organizations everywhere. While it’s nearly impossible to have a database that is 100% up-to-date and accurate, it can help to monitor database health as its own separate dimension. Keep track of basics like total accounts and total (verified, mailable) contacts, as well as engagement levels with individuals, at your target accounts. Set targets for database completion (What percentage of your accounts have accurate domains, revenue ranges, industries, etc.?) and engagement (What percentage of your contacts have responded to at least one email, participated in at least one program, etc.?) to keep the health of your database front-of-mind.

## **CHANNEL99**

**DGR:** *Can you walk us through the ideal RevOps stack and the role Channel99 plays? What other solutions does your platform complement?*

**Shaffer:** Channel99 specifically helps the marketing arm of the RevOps stack by shifting to opportunity-centric models that measure, benchmark and predict the impact of their marketing investment. Channel99 measures cost and spend efficiency so businesses can understand the baseline performance of their vendors and channels and make informed, data-backed decisions about where to put or pull budget.

**DGR:** *How can practitioners ensure they're measuring and tracking the right metrics?*

**Shaffer:** Be honest about what the end goal is. If it's profitability, focus on metrics that can help drive pipeline more predictably; if it's conversions, dive deeper into identifying where there are peaks and valleys on the buyer's journey and work to optimize or eliminate.

**DGR:** *Is there anything we didn't touch upon that you'd like to discuss now?*

**Shaffer:** While it feels like this is a message we've heard before, organizations really are under an unprecedented amount of pressure to be wise in their investment decisions. Every dollar needs a purpose and a proven outcome, and the most successful companies will be the ones that deeply understand what impact they are getting from their spending.

**CHANNEL99**



## ENSURING ACCESS TO CLEAN DATA IS CRITICAL

B2B marketers understand that data management drives RevOps success, but there is more work to be done to fully leverage and integrate data. According to [Forrester's "Rise Of RevOps Report,"](#) only 36% of respondents said their team is aligned on data management. In addition, less than one-third (31%) noted that their organizations' measurement, analytics and insights are completely aligned — meaning that most teams don't have access to the fundamental data needed to develop cohesive strategic plans.

"There needs to be more of a continual focus on ensuring that the data quality is being monitored," Miller said. "If you're looking to get reporting on velocity, for example, you need lead management practices in place and the data needs to be accurate so it can be actionable."

As workflows are identified, dependencies among them will emerge. Gartner's "Implement The Revenue Operations Model" report noted, "organizations have access to data on buyer preferences, such as intent, that can tell an organization when their prospects are searching for information relevant to their solution."



With that in mind, how can marketers ensure RevOps stakeholders have access to the data needed to execute their responsibilities efficiently?

“From my experience, the data is from the same source — a data warehouse — but the difficulty is in pulling the correct data due to the differences in definitions and/or lack of clarity on how the numbers are pulled,” said Weisen Li, VP of RevOps for **ActiveCampaign**, a customer experience automation platform. “In such case, shared dashboards along with a metrics glossary that outlines the fields and formulas of each metric can help speed up analysis and avoid misalignment.”

Data accuracy is critical as stakeholders view access dashboards for decision-making. Dashboards need to be flexible enough to meet the varied needs of leaders and team members, added Miller. Before generating dashboard, organizations should ask:

- What does the CMO wants to see?
- What does the CRO want to see?
- How are we tracking if our goal is \$10 million for the first half of the year?
- Where are we with opportunities?

## **Proof Point**

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**Edcast**, a unified talent experience platform, inadvertently realized it had data issues when searching for a recording and calling platform. Turning its focus to cleaning data, the company sought out a RevOps platform that automatically collected and analyzed data from all sources, scored buyer engagement and provided complete deal insights. By utilizing the platform for an average of 25 minutes per day, the company has seen more than 95% forecasting accuracy.



## ALIGN ON METRICS THAT MATTER TO REVOPS

When it comes to the metrics that most accurately track RevOps success, Li noted that there has historically been tension between sales/RevOps and demand gen regarding targets.

“This tension is mostly because marketers tend to focus on higher-level funnel metrics, like MQL volume, when those might not necessarily translate to annual recurring revenue,” Li continued. “Where I’ve seen better alignment is when marketing adopts sales’ ARR targets and use top-of-funnel metrics as early indicators of progress to ARR rather than as targets.”

B2B marketers need to collaborate with sales leaders to understand what is driving revenue growth throughout the entire customer lifecycle. However, 50% of respondents said they struggle to gain insights from their data to some degree, according to the Forrester report.

In many cases the data is available but not optimized to develop company-specific metrics.

“Measuring the things that are actually correlated with growth and supporting the objectives that you have are critical,” Davis said. “Make sure you don’t get bogged down by measuring irrelevant metrics. People tend to get super focused on measuring MQLs that they do everything to get MQLs instead of quality conversations that turn into revenue.”

Success depends on collaboration and consistency when determining the key metrics that drive revenue. By 2026, 60% of B2B organizations will fail to create a functioning end-to-end revenue process and will revert to functional silos because they consolidated commercial execution through organizational design alone, according to the Gartner report.

Determining operating cadence requires, “a series of automated report deliveries, meetings and even one-on-one conversations with ops team members,” Nylas’ Lee said. “The operating cadence is vital so that people know where to source the data they need. When executed well, RevOps is the driving force that guides the executive partners to begin quarterly planning at the right time or even something simpler such as being well-prepared for a forecast call.”

However, alignment can be elusive. According to Forrester, 37% of respondents identified limited alignment across teams’ success metrics as a challenge. How can organizations come to a consensus on metrics?

Lee suggested that RevOps should lead a cross-functional meeting called “Pipeline Council.”

“These important weekly meetings are one component of an ‘operating cadence,’ where departments are coming together to discuss the pipeline and demand generation,” she continued. “Attendees include sales and marketing leaders, RevOps, product marketing, business development, sales enablement and more. I have led these meetings at a few different companies now, and they are very effective in uniting teams with mutual goals and priorities.”

## **Proof Point**

**RepTrak**, a reputation data and insights company, found that its marketing team had an overall distrust and conflicting data with sales due to a reliance on “old-fashioned” marketing tactics. After turning to a RevOps platform for help, RepTrak was able to clean its data and restore trust between the departments. By ensuring all teams were accessing and updating the same pool of data, some of the key results the company generated include:

- A 22-day reduction in the sales cycle;
- Meeting 106% of its pipeline quota goal; and
- A 64% increase in contract value.



## CONCLUSION

Organizations are increasingly adopting a RevOps model. It provides efficiency, predictability, elasticity and resiliency, according to Gartner. While RevOps is not a new concept, issues with data, technology and disparate systems make it a challenge to execute. And stakeholders often can't come to an agreement on which metrics to prioritize to track business success.

"Ultimately, organizations are trying to create more singular experience, which requires seamless data integration and relevant dashboards," said Shift Paradigm's Davis. "As you use more consolidated tools, it gets easier to orchestrate a journey. But data is the driver of a high-performing RevOps team."

## CHANNEL99

Channel99's B2B performance marketing platform unites marketing and finance teams to more effectively improve the value of marketing investment. By measuring the performance of vendors and channels, Channel99 provides B2B companies with accurate insights into which investments reduce dollar inefficiencies, lower customer acquisition cost, and more predictably exceed sales pipelines.

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*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 multichannel demand generation efforts.

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