

The Keys to Revenue Growth

Your Guide to Unlocking RevOps' Full Potential

Presented by

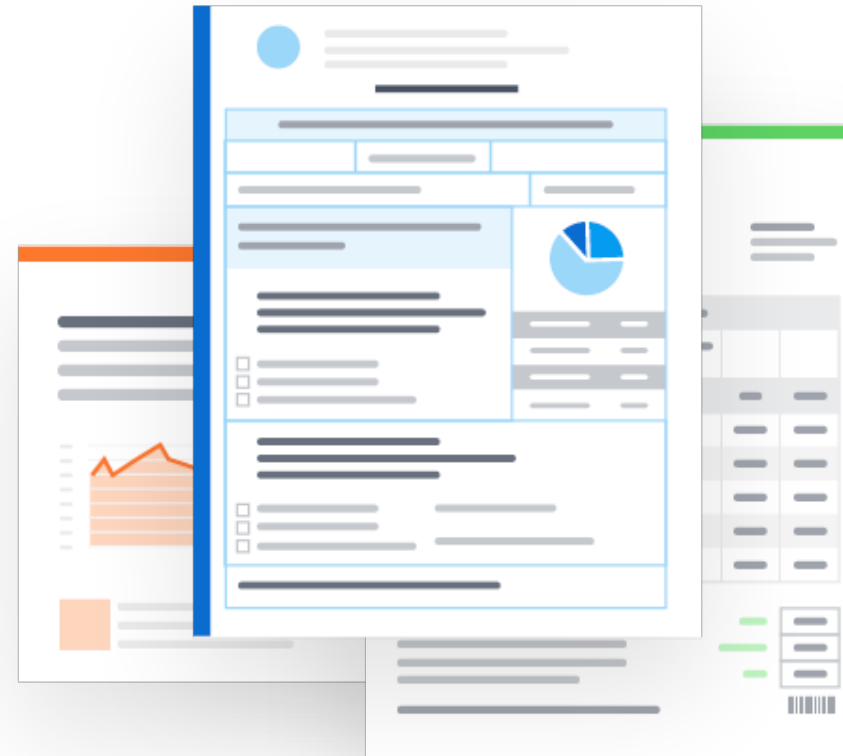
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Introduction

Revenue Operations (RevOps) has quickly become the topic du jour in conference rooms and Zoom meetings worldwide. “What’s our RevOps model?” “Do we have a RevOps Strategy yet?” More than just a fad, the RevOps model has profoundly (and perhaps permanently) changed the way B2B companies align themselves internally to drive growth.

This guide highlights the common pitfalls companies face while implementing a RevOps model and how the best B2B players are using the strategy. Plus, we’ll cover how you can put the RevOps structure into practice in your own business to start seeing a payoff.



Avoiding The Most Common Obstacles to RevOps Success

Revenue Operations, or RevOps for short, has been around for a few years, but the strategy is really having its moment. According to LeanData's "The State of Revenue Operations" report shows that between 2018 and 2019, there was an 80% increase in companies with a Revenue Operations group.

What is it? Simply put, the role of Revenue Operations is to ensure that the goals and activities of the three departments which typically drive revenue — sales, marketing, and customer service — are all synchronized and integrated.

For many years, marketing, sales, and customer success departments operated as separate teams, sometimes working against one another. Each department was concerned only with the role it played in the customer journey. Often, the left hand of an organization had no idea what the right hand was doing.



“RevOps doesn’t mean setting up a new company or business model. It’s a new way of looking at your company’s operational assets as revenue generators.”

Using a RevOps mindset, companies can align the many activities of their go-to-market teams into one bigger organizational goal.

RevOps: Left Hand Meet Right Hand

RevOps, or Revenue Operations, has been a game-changing strategy for B2B organizations. With a RevOps strategy, all customer-facing teams coordinate their efforts to address the customer at each stage of their journey.

RevOps is the one team that has a 50,000-foot view of the customer journey. They know and own all the tools, systems, and processes your sales, marketing, and operations teams use and how they overlap.

Sounds easy, right? Not so much. We've found that companies who miss their revenue goals tend to do so by stepping into the very same three patches of quicksand.



Obstacle #1

NO SHARED REVENUE STRATEGY

Everyone knows a go-to-market team is only as good as their go-to-market playbook. The thing is, go-to-market strategies have become infinitely more complex, with a large number of tactical elements combined with greater complexity in buying behavior.

To counteract this, RevOps teams need to have a clear, cohesive strategy that incorporates the complexities and leverages technologies to support them. A great product launch playbook must be equal parts comprehensive, repeatable, creative, and collaborative.

Obstacle #2

TOO MUCH FRICTION IN THE BUYING PROCESS

The entire focus of a RevOps group is to reduce friction so your revenue teams (marketing, sales, customer service) can work as effortlessly and efficiently as possible. Things like automation, clear processes, and integrated technologies help reduce that friction for internal teams and for buyers and customers.

We have found that without a clear sales process and systems in place, sales reps are more likely to “go rogue” and do their own thing, which may cause problems and confusion. That’s why companies often choose a vendor like Windward Hub for document automation.

It enables sales to merge templates with data from multiple sources like your CRM platform and internal data sources, streamlining production and improving collaboration.

Obstacle #3

DISCONNECT BETWEEN DEPARTMENTS

It’s no accident that a popular RevOps podcast has the name Kill Yr Silos. RevOps’ failure is more likely to happen to organizations whose people, processes, and technologies remain largely siloed and disconnected. Lots of companies suffer from using a fragmented approach. They use multiple disconnected data systems and go-to-market motions across siloed teams operating without orchestration.

Seamless integration with a vendor like Windward Hub allows systems to talk to one another, share data, and give teams the exact info they need when they need it. Ultimately, this integration speeds up the process, delights customers, and brings in more revenue.

One Solution To Sell Them All

A single company-wide solution is needed for the marketing department's proposals, quotes and contracts from sales, and agreement renewals, and other documents from customer success. A solution must also be flexible enough to allow a team to populate templates with data from multiple data sources.

With an effective strategy, smooth sales enablement, and the right technologies in place, companies can operate more efficiently and resiliently and meet their revenue growth goals.

Windward Hub's tools provide a smooth and consistent sales process critical for business growth. Teams can easily use Hub to create proposals, quotes, and contract templates.

The dynamic template that runs Hub lets teams incorporate data from any source. Sales folks can close deals faster with quick and easy auto-generated proposals, quotes and contracts.

Establishing a compliant document distribution process will help your team reduce risks and avoid mistakes and gaps in account history. A product like Hub empowers teams to easily share and store documents in a centralized account view within the existing CRM.

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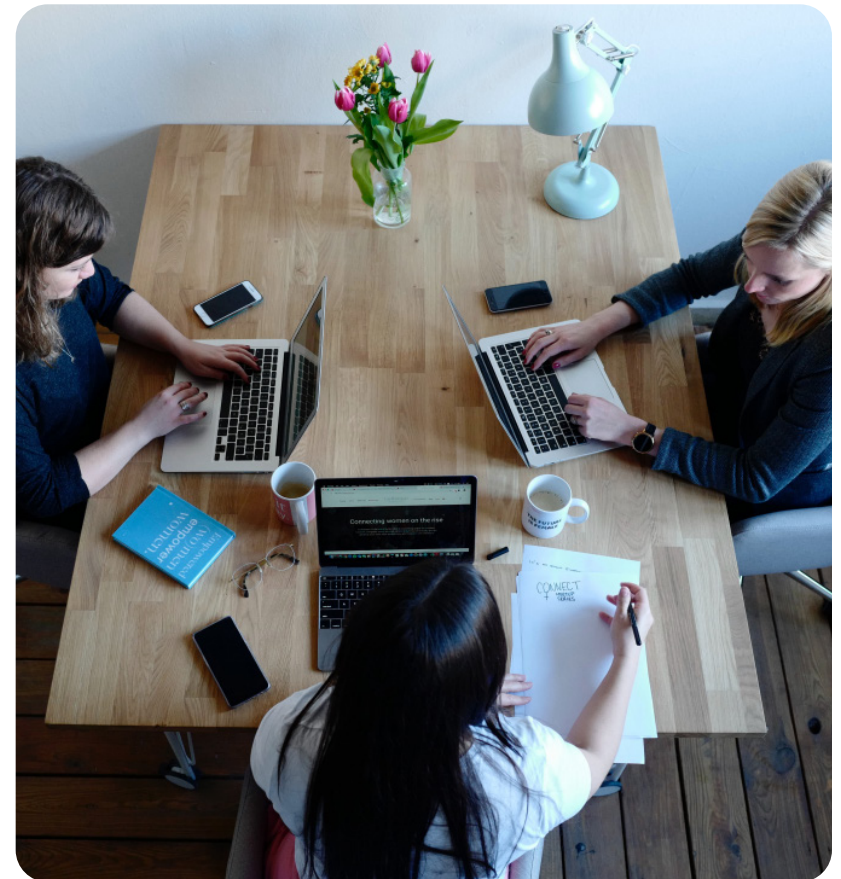
Creating the Connective Tissue for a Better Sales Process

Most large companies are essentially a large, sprawling family of people and processes. However, even though this family may share a last name and an overbite, they have never truly had a family reunion.

Because this “family” has never met or played volleyball together, everyone feels a little awkward around one another. Everything is disconnected; there is no connective tissue. Sharing a document automation system that is easy to use, like Windward Hub, is like throwing a week-long family reunion. It makes it that much easier to work together and work toward the same goal.

Equip Your People With What They Need To Do RevOps Right

At the end of the day, you want to run your business in the most efficient way possible. To do so, you need flexible, proactive individuals on a team that works across your company. You also need to equip those individuals with the power to easily generate documentation for processes.



How Best-In-Class Companies Are Using RevOps and What You Can Learn From Them

We've looked at the rockstars of RevOps and have assembled three ironclad takeaways from some of the greatest minds working in it today.

Lesson #1

INCORPORATE DESIGN THINKING INTO YOUR REVOPS PLANNING

Ross Nibur is recognized by many as one of the top 10 Sales Development Leads in the World and Top 100 Sales Coaches to Watch. He runs operations for Toast, an all-in-one platform for the restaurant industry.

In speaking with Jason Reichl on his Kill Yr Silos Podcast, Ross stressed that he believes Design Thinking is a critical piece of being an operations leader. Nibur has a professional background as a prep cook, so he comes to operations from a restaurant's perspective and explains Design Thinking this way.

“Anytime you go into a restaurant, every grill you’ve ever seen has a bottle of oil sitting right next to it. Why? Because anytime something goes on that grill, the grill guy is going to reach over to pick up the bottle and put some oil down for whatever he’s going to cook — burger, chicken, whatever. Doesn’t matter. Oil is going on that grill top.

Now, if you were a restaurant operator you’d never take that bottle of oil and stick it in a cabinet down at the bottom of the stairs. So that every time your grill guy needed to do his job, he had to run down a flight of stairs, go and find something, then take it upstairs, put it on the grill go back down and do that whole process over again, right? No. Of course not, because it’s just going to add a ton of steps, and screw up the employee experience or the customer experience you’re trying to create.

But...in our CRM systems we make our employees run up and down the stairs all the time to find information in the technology. Constantly! That’s a design problem.”

SET UP CLEAR BUSINESS PRACTICES

Setting up clear, streamlined business practices is the first step toward resolving bad process design and capturing lost revenue. Even though your senior leadership may have set the process up for good reasons, should your team be manually pulling data from multiple sources to update a contract, crossing their fingers that it’s the right data? Peel back everything you do and look at it with fresh eyes through a design-thinking lens.

Some companies hit a dead end right here at this first step. Let’s be frank. It takes courage to open yourself up to criticism and bold, new thinking. But that kind of vulnerability, and a willingness to change is exactly what’s required in the modern RevOps era.

GET YOUR PEOPLE THE RIGHT TOOLS

Outfitting your team with the right tools is the second step. Integrate technology into your core business functions. Look for systems and tools that won’t bog down the process and you’ll set employees up for success in getting their work done efficiently and effectively.

Well-designed business procedures can lead to twice the result with half the work, and that’s not hype, so it’s definitely worth the time and investment required.

Lesson #2

DON'T FORGET WHAT CRO REALLY STANDS FOR

Thiago Sa Friere is the current CRO at Chorus.ai, a leading conversation intelligence platform where he oversees the global customer success, implementation, RevOps, sales, solutions engineering, and the technical support team.

Sa Friere likes to joke that his CRO title would be more accurate if it stood for “Customer Relationship Obsessed,” rather than Chief Revenue Officer.

In a recent conversation with Lorena Morales, host of The Revenue Podcast Sa Freire explained, “I’m here to create a foundation for our people and our customers to be the best versions of themselves. Companies need to have way more of a focus on the voice of the customer. My job is to make sure the customer has a true seat at the table.”

PRIORITIZE CUSTOMER RELATIONSHIPS

Companies like Chorus don’t create a cult following by accident. It’s a calculated strategy based on the value of prioritizing customer relationships. They reinforce that value with every decision they make in processes, technology, and culture.

More and more, the data shows that fortune favors those businesses which put humans – including their customers and employees – at the center of how they build and evolve their business. Creating a radical customer-centric culture takes discipline. You must commit to truly allowing customer needs to drive all business and process decisions. The result is that customers feel individually known and their needs understood and anticipated by the companies they buy from.

Employees who spend less time recreating documents are freed up to actually connect with the customer and meet their needs.

Lesson #3

GIVE B2B BUYERS WHAT THEY REALLY WISH FOR... A B2C EXPERIENCE

Jason Reichl is the co-founder of Go Nimble, the first revenue operations consultancy. The firm works with high-growth companies and claims to increase their client's customer revenue by 26% by eliminating operational silos.

Reichl feels that what all B2B buyers truly yearn for is a B2C experience, and that experience is exactly what Revenue Operations can offer. Go Nimble's website explains it this way. "Revenue Operations is all about creating personalized experiences for customers, but personalization is more than a throwaway sentence at the beginning of an email. In order to deliver a truly personalized customer experience, you need to understand your buyer journey and your revenue team's role in improving it."

A company like Windward Studios provides that common language to teams. Their Hub product is a tool made for the RevOps age. It allows teams to quickly automate complex documents from dynamic data and integrate them to create beautiful layouts.

INVEST IN THE TOOLS THAT WILL ALLOW YOU TO DRIVE STRONGER CUSTOMER RELATIONSHIPS

Today's competitive marketplace means brands are no longer built through advertising but through experiences. Accordingly, invest in technology and systems that allow your organization to drive stronger relationships with your customers. The most successful companies are using technology to build immersive, personalized customer journeys across every channel.

INCREASE CUSTOMER-FACING TIME

Sellers need to spend more time in front of customers and less time on internal tools and processes. To that end, operators need internal tools with a unified, efficient design. Processes roll out more smoothly when everything a person needs is right at their fingertips—ultimately improving the customer experience and contributing to revenue.

TOOLS SPECIALLY DESIGNED FOR THE REVOPS AGE

A big part of finding more revenue in your operations is teaching your team how to look at the data your business is creating. It's easier for teams to do that when they share a common language and use tools they already know, like Microsoft Dynamics and HubSpot.

Putting RevOps Lessons into Practice to Unlock Revenue Growth

After speaking with, reviewing, and working with companies who are RevOps thought leaders, three common denominators have emerged as the keys to implementing a successful RevOps strategy. It's a 3-point strategy we call the P.S.P. Plan.

P is for PROCESS

PINPOINTED GROWTH TOOLS AND REQUIREMENTS

Equipping your team with the right systems will help your company meet its goals faster, more consistently, and with more accuracy.

While you are removing steps and duplicated processes for your sales team, don't change everything all at once. For example, find a document generation software that will work well with your existing tools. Windward Hub works with tools most teams already use, such as Microsoft Dynamics, HubSpot, and other CRMs.

S is for SYSTEMS

CREATING A STRONG DATA FOUNDATION

At this point, due to organic growth, your company is probably using lots of different tech products across your company. Ultimately, your tech-stack needs to be interconnected, and there should be an outlined process for each tool.

Documentation of your platforms is an integral part of RevOps. Time to insight is shorter, and those insights are more complete for when sales, marketing, and customer success go to use them.

You'll also reap the benefits of being able to tap into the same data for planning and budgeting purposes. Tools like Windward Hub enable sales, marketing, and customer ops to be on the same page about the go-to-market model.

CLEANING UP DATA AND PROCESSES ISN'T SEXY OR FUN, BUT IT'S WORTH IT

A major key to RevOps success is making sure everyone on your team is "speaking the same language" when it comes to data. That may mean sitting down and looking at the entire customer experience holistically.

It can be mind-numbing work to clean up data and redundant data processes. But getting it right is one of the most important steps toward generating new revenue for your organization and optimizing experiences for your customers and your staff.

P is for PEOPLE

ORCHESTRATE MEANINGFUL EXPERIENCES

Ultimately, you are trying to create streamlined workflows to free up your team to spend on more revenue-generating tasks. Remove the tedious tasks of manually creating documents and eliminating the fallout that is bound to happen without a centralized system.

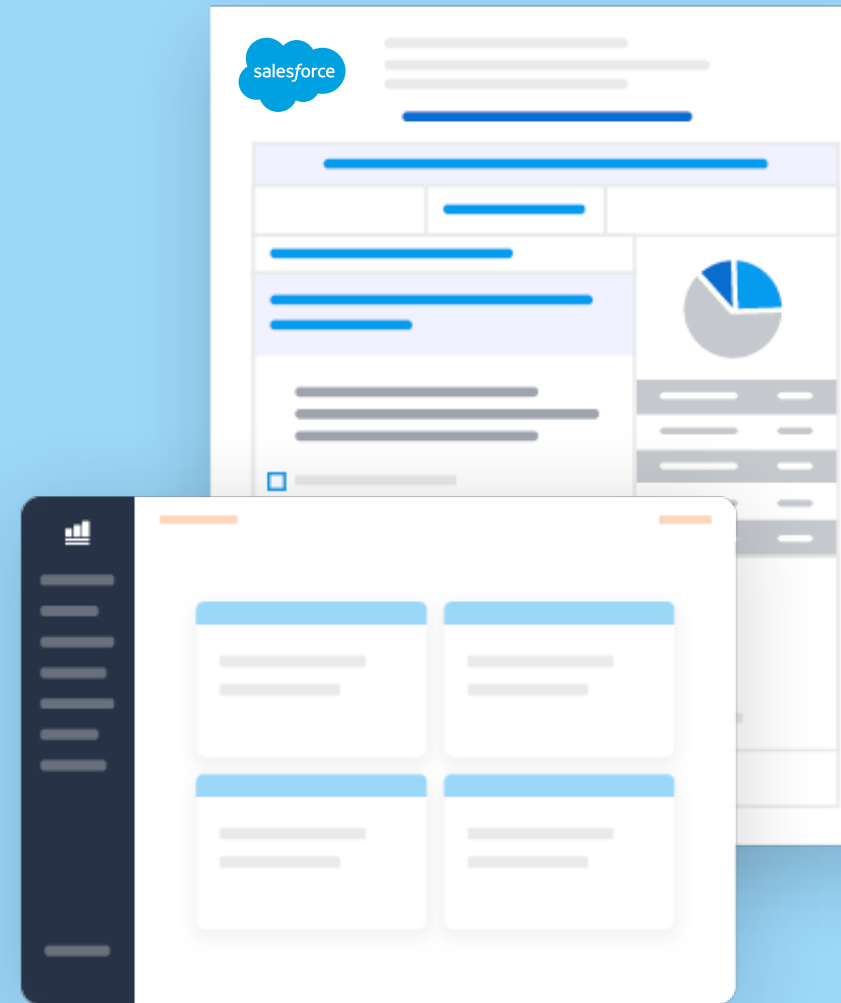
This allows your sales team more time to dedicate to nurturing prospects and closing deals. With the right systems in place, teams can collaborate on cross-functional engagement that leverages technology from sales, marketing, and/or customer success tools.

Set Your Company Up in A Customer-Centric Way

A shared tech stack and data foundation make it possible to design experiences the way the customer sees them. This customer-centric perspective does a better job of creating, automating, and scaling experiences customers find valuable. Delivering fast, informative, and personalized proposals, contracts, and quotes, and other documents is a way for companies to stand out for the relevance of their overall engagement.

The Customer Journey Isn't A Straight Line

Since your customers will reach your brand via many different channels, it's really more of a squiggle and at various points along the way in the buying process. Often, their journey isn't a linear progression. They zig forward and backward along the way. Changing your company's organizational structure to account for this fact is the first step in creating a solid, usable RevOps strategy.



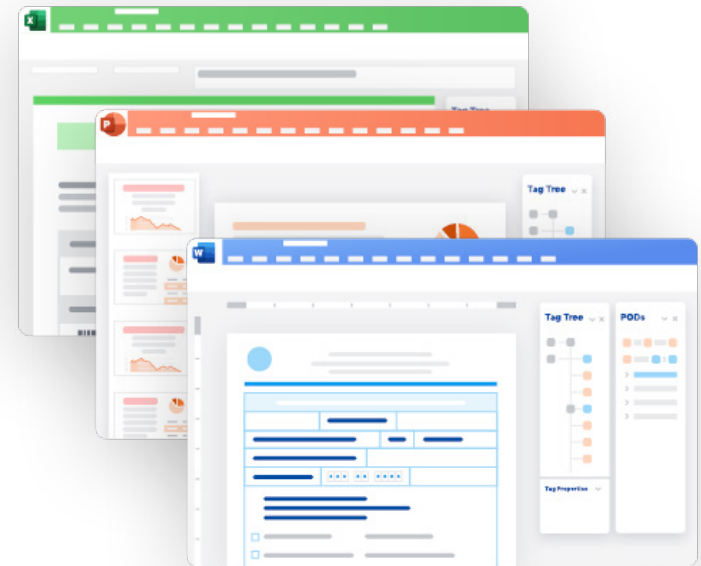
Drive Growth With a RevOps Framework

As you can see, although RevOps is a new strategy it builds upon (well, improves upon) your current business practices. It's not a total revolution of how you do business. You likely have all the players and data you need to get started. You need to do two key things to start making a RevOps model pay off, rethink your organizational structure with a customer-centric lens, and take a look at the tech tools your people have.

Universally adopt and communicate a RevOps mindset in your company.

This may involve redrawing some org charts and rethinking how some departments are structured but it can be done with the key players sitting at a table. Then, you may have to invest in technology to allow these groups to speak easily, share information freely, and serve the customer more consistently.

RevOps doesn't mean writing an all-new constitution for your company, but it may involve incorporating a few amendments.



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