



REVENUE OPERATIONS JOB SPECIFICATION BENCHMARKS



THE GROWING ROLE OF REVENUE OPERATIONS IN THE 21ST CENTURY COMMERCIAL MODEL

BEST PRACTICES FOR DEFINING AND EVOLVING THE OPERATIONS THAT SUPPORT THE REVENUE CYCLE TO DRIVE SCALABLE AND SUSTAINABLE GROWTH



I. EXECUTIVE SUMMARY

THE GROWING ROLE OF REVENUE OPERATIONS IN THE MODERN COMMERCIAL MODEL



THE EVOLUTION AND CONSOLIDATION OF THE OPERATIONS THAT SUPPORT THE REVENUE CYCLE TO DRIVE SCALABLE AND SUSTAINABLE GROWTH

Revenue Operations has emerged as the fastest growing job in the US right now according to jobs analysis by Linked In. But a quick Google search will tell you nobody really agrees on what Revenue Operations is. Few can define it.

Our analysis of hundreds of RevOps job descriptions, and discussions with over seventy executives who carry the Revenue Operations moniker in their title – it’s pretty clear that no one job description is the same. Rather, Revenue Operations describes a conflation of a dozen or more historically fragmented functions and roles – Sales Operations, Sales Enablement, Marketing Operations, Customer Analytics, as well as Training and Development.

At the highest level, the primary goal of a Revenue Operations leader is to unify and align the operations, systems, and data that support revenue teams along the entire revenue cycle to generate more consistent and scalable growth. That’s important because growing a business in 2023 is a digital, data-driven, and technology enabled team sport. B2B growth leaders are driving a machine that uses customer data as gasoline, selling content as oxygen, and digital technology to get traction with customers. The assets that support this growth machine – customer data, digital selling infrastructure, and brands – are the largest financial assets on the company balance sheet.

On a practical level, running this growth machine using traditional marketing, sales, customer service, product, IT and finance functions is like driving an expensive racing car that is only firing on two cylinders, gets terrible gas mileage, and needs a wheel alignment. Customers won’t suffer the bumps and bruises of being passed from disconnected marketing, sales, and customer success teams as they move along the revenue cycle. And investors won’t stand for high selling costs, leaky revenue forecasts, and untapped customer expansion potential for long.

That’s the primary reason why 90% of organizations are actively changing the way they lead and align revenue teams and the operations that support them according to research in the book Revenue Operations. The lines between these functional teams have blurred. And the systems and data that support them are becoming increasingly connected. The difference between the marketing and sales technology stack are disappearing. First party customer data from web sites needs to be merged with account data in CRM and customer inquiries from Customer Success. And the entire notion of a sales transaction has changed as



businesses go from selling individual widgets to streams of consumable services and subscriptions. “We don't really talk in sales and marketing at our company,” says [Jenna Pipchuk](#), the EVP in Chief Sales Officer of Smart Technologies. “We really talk about the Unified Commercial Engine which is all the people, channels and the entire revenue stack that supports the revenue cycle. And we work together on that.”

This has spawned the Revenue Operations job function – a next generation operations leader with a mandate to orchestrate sales, marketing, and service teams – and align the operations, systems, data and processes that support revenue teams to get better control over the end-to-end revenue cycle. To achieve that level of alignment, leading companies are redesigning the role of operations that support the revenue cycle to create Revenue Operations roles that have an expanded scope and mandate to accelerate revenues. Large enterprises like Juniper Networks, Pure Storage, Conga, Affirm, and Schneider Electric are introducing expanded Revenue Operations roles that have a broader scope and a remit to better manage commercial assets, the operations and enablement infrastructure, and the customer journey across the enterprise. Some organizations are folding all of the operations and systems that support the revenue cycle under one operations leader. For example, Affirm has put in place a Revenue Operations VP reporting to the Chief Commercial Officer, who has analytics, sales enablement, program management, field operations, selling systems and tools, and incentive compensation as direct reports. Others have expanded the remit of an existing operations function, as in the case of Conga, which added Sales Operations, Field Operations, Deal Desk, and Order Operations under the purview of Marketing Operations leader, as part of a RevOps Transformation initiative. “The Revenue Operations moniker reflects the changing strategic priorities, business operation realignment, and new tasks and responsibilities that the company did not have before,” says Kim Whitler, Professor of Marketing at The Darden School of Business who has studied the emergence of the Chief Revenue Officer and Chief Growth Officer. “For example, in many cases we are seeing marketers are being asked to take on a bigger role in supporting development, activation and expansion capabilities and take on a broader role in analytics and accountability as part of a Revenue Operations strategy.”

Our analysis of RevOps job descriptions found the Revenue Operations job function is a moving target. The role is constantly evolving as organizations consolidate the operations and systems that support the revenue cycle. “Revenue operations is the future evolution of sales operations,” says Mary Lee, Senior Director, Business Operations at Lionbridge, who manages CRM, analytics, financial reporting and advanced analytics in her role. “The industry is moving on a journey along a continuum from sales operations to revenue operations. Sales operations wasn’t even a function 15 years ago. It started as reporting. It expanded into technology with the administration of CRM. Then we had to connect selling measurements to financial measurements. Then we had to integrate marketing technology with sales technology. Then we had to change the behavior of the sales team. And we have to motivate them with incentives and quotas. The role keeps getting bigger and bigger.”

THE FIVE CORE DISCIPLINES OF THE REVENUE OPERATIONS ROLE



COMMERCIAL OPERATIONS



COMMERCIAL ARCHITECTURE



COMMERCIAL INSIGHTS



COMMERCIAL ENABLEMENT



COMMERCIAL ASSET MANAGEMENT

But while job titles and the specifics of the role will vary over time with the maturity of organizations, the destination is clear. All of the roles we evaluated draw from 5 core disciplines. These five disciplines reflect the convergence and evolution of the traditional functions that support the revenue cycle. They combine in ways that can grow customer lifetime value, maximize the return on growth assets, and accelerate revenues.

1. **Commercial Operations:** This involves aligning the operations that support growth programs and enable human sellers along the entire revenue cycle and providing coherent management of all of the systems, assets, content, and digital selling infrastructure that support revenue teams. For example, the imperative to align data and processes along the revenue cycle is leading to the inevitable consolidation of the marketing and sales operations functions, according to Chris Thompson, VP of Global Marketing Operations at Conga. “What is the difference between Marketing Operations and Sales Operations? – in two years there will not be one,” says Thompson.
2. **Commercial Architecture:** This includes redesigning and optimizing elements of the commercial architecture to maximize coverage, control, and the return on selling assets by improving the speed, visibility, productivity, and engagement of front



line selling teams and reducing cost to sell. This is important because using advanced analytics to challenge and optimize the long standing assumptions about sales force emphasis, roles, workloads, selling costs, and the mix, nature, and cadence of engagement needed to convert prospects to customers offers the potential to double the performance of front line sellers.

3. **Commercial Insights:** This involves using advanced analytics to turn customer engagement data into commercial insights that inform selling priorities, decisions, actions, and conversations and optimize the allocation and return on growth resources, assets and effort. “In my role, I have unprecedented access to revenue intelligence because I manage all of the primary operations that support the revenue cycle - sales enablement, sales operations, analytics,” says Haley Katsman the VP of Revenue Strategy at Highspot. “This gives me access to powerful customer engagement and interaction data that can help us better manage revenue growth by enriching our measurement and making our revenue forecasts more precise, reliable and reflective of the current situation on the ground.”
4. **Commercial Enablement:** This includes building commercial capabilities that enable, develop and retain front line revenue teams and maximize their contribution to expanding customer lifetime value at every stage of the revenue cycle. A key aspect of the job is to coordinate, connect and align the sales and marketing systems that support the revenue cycle including marketing automation, CRM software, sales enablement, sales engagement, and customer success management platforms. 75% of organizations are tasking their sales enablement and operations team to re-configure their commercial enablement technology investments with an eye for simplifying the seller workflow, improving the quality of engagement and reducing administrative costs.
5. **Commercial Asset Management:** This is the strategic management and monetization of the commercial technology, data, and digital selling channel assets to maximize their utilization, financial returns and revenue impact. This is important because the average organization has over 25 tools and services that support the revenue team. Usually these are spread over a dozen different organizations. Capital and operating investment in this growing commercial tool portfolio is expected to exceed \$10,000 per front line seller at high growth organizations. “To better manage revenues in a single interconnected revenue process, we’re trying to bring data from multiple sources to the forefront and are working more cross-functionally across our different operations organizations that support the revenue cycle,” says Steve Gordon, the VP of Global Sales Operations at Pure Storage. “I can’t have the marketing view of the revenue pipeline and the sales view and a finance view - all based on different data sets. I need to have one view of pipeline. So we’re bringing that organization together to centralize those different data sets so that everybody is operating off a single source of truth.”

To get more specific, the capabilities and remits underlying these five core Revenue Operations disciplines expand into twelve discrete job responsibilities. These capabilities and roles are detailed in greater depth in the 36-point Revenue Operations Maturity Model by the faculty of the Revenue Enablement Institute. Plotting these capabilities over time is important because it maps the evolution of the Revenue Operations function. This lets business leaders assess the state of their commercial transformation and identify the most financially viable way to “stairstep” their organizations towards greater alignment of sales, marketing and customer success teams, assets, systems, and processes.

To better define the Revenue Operations role in a 21st Century Commercial Model, the expert faculty of the Revenue Enablement Institute engaged hundreds of business leaders, as well as the leading academics and experts in the field. This report analyses the five core disciplines that underlie the Revenue Operations role, the 12 capabilities that go into the job description, and a comprehensive 36 point Revenue Operations maturity model to help business leader quickly assess the state of their commercial transformation and identify the most financially viable way to “stairstep” your organization towards greater alignment of sales, marketing and CX teams, systems, and processes.

Regardless of the title, establishing a leader with a mandate to unify and coordinate sales, marketing and service operations into a high-octane growth machine will be essential to growing a business in the next decade. “Titles, remits, and job scopes will vary company to company, but the challenge of getting sales, marketing and customer success systems, operations, and processes working together will not disappear based on nomenclature,” forecasts Greg Munster of the Revenue Enablement Institute, who has led business transformation initiatives to drive revenue optimization and customer success at IBM, Lenovo, Red Hat, and Canonical. “Revenue Operations is now essential to any growth discipline.” “Revenue Operations is an essential career roadmap for those who have made growth their cornerstone objective,” echoes Bob Liodice, the CEO of the Association of National Advertisers. David Reibstein, Professor of Marketing at the Wharton School of Business points out that Revenue Operations addresses the real world problem that growing a business is fundamentally interdisciplinary in nature – by providing clear roles, structures, skills and systems leaders can use to manage, coordinate an align many disciplines coherently around the customer. The Revenue Operations role has become a “farm system” for CROs because they have the data management, technical, and financial skills required to manage the modern commercial model, according to Warren Zenna, the founder of the CRO Collective. In operations, it has been a career path and a ticket to the C suite. “Revenue operations is a critical issue for me,” says Mary Lee of Lionbridge who has a front line operations role. “It’s my career path.”



THE REVENUE OPERATIONS JOB DESCRIPTION

A BLUEPRINT FOR ALIGNING SALES, MARKETING AND CUSTOMER SUCCESS TEAMS AND OPTIMIZING THE PERFORMANCE OF COMMERCIAL PROCESSES, OPERATIONS AND ASSETS

DIMENSION	DEFINITION	CORE COMPETENCIES
 <p>COMMERCIAL OPERATIONS</p>	<p>Aligning the operations that support growth programs and enable human sellers along the entire revenue cycle and providing coherent management of all of the systems, assets, content, and digital selling infrastructure that support revenue teams</p>	<p>1.0 Sales and Marketing Operations. Planning, supporting, consolidating, and measuring sales and marketing programs and the processes and systems that support them</p> <p>2.0 Commercial Process Management. Establish, measure, and optimize an enterprise commercial process that spans the entire revenue cycle and spans the marketing, sales and customer success functions</p> <p>3.0 Forecasting and Reporting. Reporting pipeline performance reports and developing the sales opportunity, revenue and financial forecasts with finance</p>
 <p>COMMERCIAL ARCHITECTURE</p>	<p>Redesigning the commercial architecture to maximize coverage, control, and the return on selling assets by improving the speed, visibility, productivity, and engagement of front line selling teams and reducing cost to sell.</p>	<p>4.0 Go to Market Architecture Redesign the go-to-market strategy and sales force design to improve performance, engagement, costs and the customer experience</p> <p>5.0 Planning and Resource Allocation. Optimize the allocation of growth budgets, resources, and investments and support integrated growth planning with finance</p>
 <p>COMMERCIAL INSIGHTS</p>	<p>Using advanced analytics to turn customer engagement data into commercial insights that inform selling priorities, decisions, actions, and conversations and optimize the allocation and return on growth resources, assets and effort.</p>	<p>6.0 Data Driven Selling. Analyze data from across departments to better inform customer targeting and prioritization, guided selling and coaching, and personalization at scale</p> <p>7.0 Performance Measurement. Establish fact-based reporting analytics and KPIs to measure commercial performance and inform the allocation of growth investment, resources and effort.</p>
 <p>COMMERCIAL ENABLEMENT</p>	<p>Building a common core of commercial capabilities that enable, develop and retain front line revenue teams and maximize their contribution to revenue and profit growth and expanding customer lifetime value at every stage of the revenue cycle</p>	<p>8.0 Sales Enablement and Engagement. The design, deployment, integration and management of systems to simplify the day to day selling workflow and enhance revenue team engagement.</p> <p>9.0 Sales Training and Development. Design, deploy, integrate and manage to better support sales readiness, training, and development</p> <p>10.0 Quote to Cash Operations. Design, deploy, integrate and manage to enhance the lead-to-cash cycle and capture more revenue, margin, and price.</p>
 <p>COMMERCIAL ASSET MANAGEMENT</p>	<p>The strategic management and monetization of the commercial data and technology assets to maximize their utilization, impact, and financial returns and accelerate revenue growth</p>	<p>11.0 Commercial Technology Portfolio Management. The centralized stewardship and reconfiguration of the commercial technology portfolio across functions and every stage of the revenue cycle</p> <p>12.0 Customer Data Asset Management. The centralized stewardship of CRM data and establish a common architecture and operating system to consolidate, enhance, curate and monetize customer data assets</p>



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ABOUT THE RESEARCH

This research initiative was led by the expert faculty of the Revenue Enablement Institute in collaboration with over 25 industry practitioners and experts. To define and execute this best-practice analysis, our faculty of leading academics, experts, and practitioners in the field of Revenue Enablement and sales management has conducted interviews with 102 growth leaders and sales effectiveness professionals and experts between January 2022 and March 2023. These experts lent their research and decades of practical experience and external validation to the recommendations about how organizations are transforming the operations that support revenue growth to get sales, marketing, and service organizations to work as one revenue team and make the selling process faster, more digital, data-driven, and measurable in the face of changing buying behavior and underperforming growth assets. The faculty contributing directly to this analysis include:



Stephen Diorio, Stephen Diorio is the Managing Director of the Revenue Enablement Institute, and a Senior Fellow at the Wharton Customer Analytics Initiative. A leading authority in go-to-market transformation, sales and marketing performance management, and revenue operations, Stephen has helped over 100 organizations to reengineer their revenue operations to accelerate growth and become more data-driven, digital, and accountable. He has authored several books on commercial transformation including Revenue Operations: A New Way to Align Sales & Marketing, Monetize Data.



Chris Hummel, Chris Hummel is a Managing Director at the Revenue Enablement Institute leading CXO programs. Chris is a global CXO with a track record of successfully aligning sales, marketing and product teams at world-class companies like Oracle, SAP, Schneider Electric, Siemens and United Rentals to accelerate growth. He recently co-authored Revenue Operations: A New Way to Align Sales & Marketing, Monetize Data. Learn more about his successes aligning sales and marketing; collaboratively creating digital products and services; and using brand repositioning to amplify business strategy to drive measurable and scalable growth



Greg Munster, Greg Munster is the Managing Director of Sales Transformation at the Revenue Enablement Institute. Greg is a leading authority in sales enablement and customer-centric go-to-market transformation. He has led numerous business transformation initiatives to drive revenue optimization and customer success at industry leading global technology firms including IBM, Lenovo, Red Hat, and Canonical. Greg has over a decade of practical experience in the design, implementation and adoption of the sales technology portfolio including CRM, CPQ, Sales Engagement, Digital Asset Management and Learning Management within enterprises. Learn more about Greg’s insights into ways technology can better support revenue teams



Jeff McKittrick, Managing Director Digital Selling Platforms, the Revenue Enablement Institute. Jeff is a leading authority in revenue enablement with over 15 years of sales operations leadership experience building and implementing digital selling and sales enablement platforms at Cisco, Hitachi Vantara, WalkMe and Pure Storage. Jeff and his team at Hitachi Vantara won Sirius Decisions’ Program of the Year for Sales Operations for their work on creating the Digital Selling Platform.

This steering committee was supported by contributions from academics and subject matter experts from the Revenue Enablement Faculty including David Edelman, Bruce Rogers and Professors David Reibstein, Leonard Lodish, and Raghu Iyengar of Wharton, and Bob Kelly the CEO of the Sales Management Society.



ABOUT THE REVENUE ENABLEMENT INSTITUTE

The Revenue Enablement Institute™ is an advisory and research firm whose mission is to educate and arm the next generation of senior growth leaders with solutions, skills, capabilities, and best practices they will need to accelerate revenue growth and adapt to the new market environment. Our faculty of academics and experts are actively working with owners, CEOs, and their growth leaders to help them transform sales, marketing, and service system into a 21st Century Commercial Model that is more digital, data-driven, and measurable. Our efforts focus on the five key enablers of profitable and sustainable growth.

- 1. LEADERSHIP** – Successful sales and marketing transformation will require new skills and leadership approaches. The next generation of growth leaders must be coaches that find ways to get revenue teams to work together, and find better ways to use data, information, and technology as force multipliers.
- 2. TEAMWORK** – Growth leaders will need new managerial architectures that break down organizational silos and foster teamwork across sales, marketing, and service at scale across the enterprise. Old hierarchical command and control approaches will be too slow, culturally toxic, and introduce too many points of leakage and failures as revenue opportunities move across functions.
- 3. COMMON INCENTIVES** – Revenue teams can only succeed if they have a common purpose. Growth leaders must define a single scorecard for success that will give disparate sales, marketing, and customer success teams the incentives to work together to grow revenue and customer lifetime value. Hierarchical, functional, and waterfall metrics based on linear sales funnels and independent functional roles will fail to either foster teamwork or address current customer behavior.
- 4. INSIGHTS** – All customer-facing employees need a fully transparent, 360-degree, real-time view of the entire buying journey if they are going to play like a team. Revenue teams must act on buying signals, location-based opportunities, or churn triggers in service within minutes instead of hours or days. Sharing information horizontally across the enterprise to inform and support teams from across geographies, business units, and market segments is now the key to growing revenues, profits, competitiveness and share price.
- 5. RETURN ON SELLING ASSETS** – Revenue leaders must find ways to use technology as a force multiplier and team enabler if they expect to succeed by dramatically increasing historically low levels of salesperson productivity, technology adoption and return on selling assets – content, technology, data, and automation. To do so, they must find ways to use AI-driven sales tools and workflow automation to automatically enforce new sales methodologies into daily practices, input data into CRM profiles, and deploy all the expensive content, thought leadership, and playbooks created by marketing.

We invite transformation minded CXOs, CMOs, CSOs and CEOs to participate in our research and education program so they can apply what we learn to build higher performing revenue teams. You can learn more at www.revenueenablement.com

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