

REVENUE OPERATIONS BENCHMARKING “ROB” SELF ASSESSMENT – SAMPLE REPORT

Based on your responses to the Revenue Operations Benchmarking Self Assessment, here are the key areas to focus on to start improving the company’s revenue performance and drive value creation:

1. **Develop and document a more comprehensive go-to-market strategy.** This action is identified as the top priority action item. Current GTM planning efforts appear to be missing key elements:
 - Clearly defined target customer segments and ideal customer profiles
 - Lead qualification and lead scoring model to ensure focus on high intent / high value prospects
 - Pricing strategy
 - Marketing and demand generation strategy
 - Customer success plan (onboarding, upsell, feedback loop)
 - KPI’s for lead conversion, customer acquisition costs, marketing campaign performance

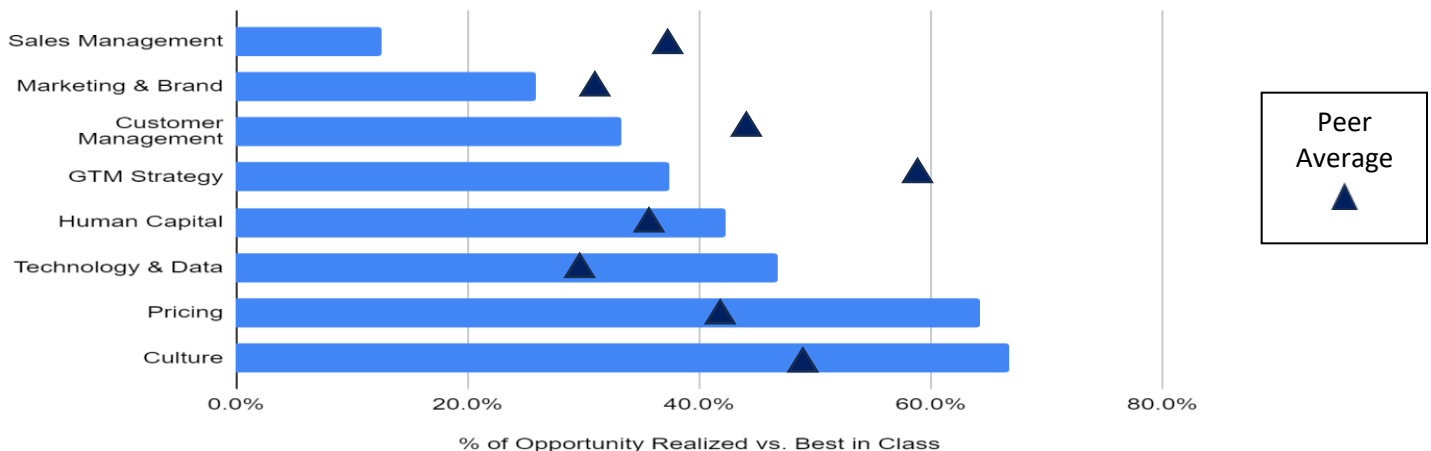
2. **Create a revenue roadmap that covers how budgeted revenue targets will be achieved:** Have a revenue-responsible executive build out a revenue roadmap that includes the major resource & operational requirements to achieve revenue targets.
 - Begin using a formal monthly process to track performance against forecasts
 - Assign a RevOps exec to analyze and act on variances to improve forecast accuracy over time

3. **Implement basic sales management practices that are missing:**
 - Establish a monthly process to review sales performance
 - Implement a simple lead scoring model
 - Begin tracking selling costs (Customer Acquisition Cost) alongside revenue per customer
 - Develop a formal policy to review and approve pricing exceptions
 - Implement an annual process to assess and optimize pricing

By focusing on these areas, ACME Tech can start to close the gap between its current practices and industry best practices, driving scalable growth and value creation.

Value Creation Opportunity Assessment

ACME Tech scores are relative to peer average (▲) and best in class potential of 100%. Scores less than 100% indicate areas where best in class practices are not fully implemented and represent value creation opportunities.



Additional Value Creation Focus Areas: After addressing top 3 RevOps value creation areas, the additional actions below will help ACME Technologies achieve its target revenue growth rate and drive scalable growth, closing the gap between current practices and peer & best in class averages:

Customer Management: Implement some basic practices to enhance revenue per client, retention, and client experience:

- Target select clients for cross-sell/up-sell and task the sales lead to map out a simple plan with incremental revenue potential targets. Use as a pilot to assess the value of developing account plans for growing high value/high potential existing clients.
- Begin asking select clients for referrals via sales and/or service
- Ensure insights from any lost/churned clients are shared with all functions and learnings applied. Depending on churn levels, task someone with churn management to track frequency, reasons, and the changes the company makes based on the learnings.
- Begin conducting a simple customer feedback program, where an executive can call a handful of clients on a regular basis to ask a few standard questions.

Marketing & Brand: Ensure an accountable owner develops a basic, comprehensive, documented marketing plan that covers how leads will be generated, lead management processes, and lead conversion targets (funnel management). Begin to think about 'brand' as an asset and how to market and monetize the brand.

Technology & Data: Task someone with assessing 'CRM ROI' and monitoring how your team is using the CRM by checking login frequency, record updates, and data accuracy. Measure how CRM usage is impacting sales performance, such as tracking conversion rates, deal closure times, and overall revenue growth.