

# Revenue Operations Diagnosis Tool

# Tool Guidance

This tool is designed to assess the health of your Revenue Operations (RevOps) team across different dimensions like strategy, operating model, structure, enablement, etc.

## RevOps Team Health Check:

This section is broken down into several focus areas each with a description, output of focus, evaluation, and team aptitude. Here are the various components:

- **Operating Model:** This is about having a dedicated RevOps function with a clearly defined RACI (Responsible, Accountable, Consulted, Informed) providing strategic insights to the Go-To-Market (GTM) team.
- **Structure:** This focuses on the GTM team consistently iterating and improving business processes through standardized procedures and a scientific method of testing hypotheses.
- **Enablement:** This is about how reps and leaders are effectively enabled with best practices and tech along the customer journey.
- **Process Optimization:** This includes Documentation, Automation, and Governance. It's about having current and centrally managed/maintained playbooks, lexicons, diagrams, and job aids, analyzing business processes regularly for optimization through automation, and having systematically reinforced lead, opportunity, and account management processes.
- **Systems:** This includes Talent, Technology, and Adoption. It's about having readily available competency in systems architecture and delivery of services across the technology stack, a cohesive, integrated, and thoughtful technology stack designed to reduce friction in the customer journey, and monitoring system utilization and measuring process adherence to optimize the rep experience.
- **Data:** This includes Data Model, Integrity, and Reporting. It's about having a clearly defined RACI with established pricing leadership and collaborative stakeholders, measuring data across completeness, accuracy, consistency, timeliness, and compliance, and driving all digital insights and reporting from a centralized source available to view by end-users.

### How to Use:

- Tick boxes that align with your team's current state.

### Interpreting Results:

- Checked boxes indicate strengths. Blank boxes indicate weaknesses

## RevOps Maturity Matrix:

This matrix helps you to identify areas of strength and weakness across different dimensions:

- **Strategy:** It ranges from having no revenue operations strategy to having a strategy that is monitored, and changes are implemented quickly based on the expected future path toward success.
- **Team:** It ranges from having no (or limited) team to having a RevOps team that is viewed as a strategic partner, aligned with the rest of the organization, and provides strategic value.
- **Process:** It ranges from having a manual process to having a frictionless customer experience where "Next Best Actions" are defined by activity and health scores and hyper-personalization.
- **Data:** It ranges from having siloed data sources to utilizing automation and machine learning to provide a foundation for prescriptive analytics.
- **Tech & Tools:** It ranges from having no dedicated tech stack to having a fully aligned tech stack with the processes, and continuous testing & maintenance as a standard operating procedure.
- **Insights & Analytics:** It ranges from having no measurement to having end-to-end lead funnel measurement in place, with attribution models used, and actions prescribed for revenue growth.

### How to Use:

- Mark your current state in each dimension

### Interpreting Results:

- Your markings show your current maturity level and where you need to improve.

**The goal isn't a perfect score but to identify areas for improvement.**

# RevOps Team Health Check

Check the boxes that align with your current RevOps team output

## Analysis output

Capability Function	Component Focus Area	Description Output of Focus	Evaluation Team Aptitude
Strategy	Operating Model	RevOps is a dedicated function with a clearly defined RACI providing strategic insights to the GTM team	<input type="radio"/>
	Structure	GTM teams consistently iterate and improve business processes by way of standardized procedures and a scientific method of testing hypothesis.	<input type="radio"/>
	Enablement	Reps and leaders are effectively enabled with best practices and tech along the customer journey	<input type="radio"/>
Process Optimization	Documentation	Playbooks, lexicons and diagrams and job aids are current and centrally managed/maintained.	<input type="radio"/>
	Automation	Business processes are analyzed at a regular cadence to validate eligibility for optimization through automation	<input type="radio"/>
	Governance	Clearly documented lead, opportunity and account management processes are systematically re-enforced	<input type="radio"/>
Systems	Talent	Readily available competency in systems architecture and delivery of services across the technology stack	<input type="radio"/>
	Technology <sup>1</sup>	A cohesive, integrated, and thoughtful technology stack designed to reduced friction in the customer journey	<input type="radio"/>
	Adoption	System utilization is monitored and adherence to process is measured to optimize rep experience	<input type="radio"/>
Data	Data Model	Clearly defined RACI with established pricing leadership and collaborative stakeholders	<input type="radio"/>
	Integrity	Data measured across the following: Completeness, accuracy, consistency, timeliness, compliance	<input type="radio"/>
	Reporting	All digital insights and reporting are driven from a centralized source available to view by end users	<input type="radio"/>

Note: 1 - This component is the emphasis of the blog "Tech Debt in Private Equity: Is Your Tech Stack Growing a Burden?"

# RevOps **Maturity Matrix** | Identity areas of strength and weakness

	<b>None</b>	<b>Aware</b>	<b>Aligned</b>	<b>Optimized</b>	<b>Strategic</b>
	<i>Undefined</i>	<i>Descriptive</i>	<i>Diagnostic</i>	<i>Predictive</i>	<i>Prescriptive</i>
<b>Strategy</b>	No revenue operations strategy	Strategy defined, but not utilized.	Strategy is defined and used with Sales & Marketing only.	Strategy is used with Sales, Marketing, and Customer Success. Outcomes are monitored.	Outcomes are monitored and change is implemented quickly based on expected future path toward success.
<b>Team</b>	No (or limited) team	Roles are defined, but there is high team turnover. Performance is not measured.	Roles are defined, but with low team turnover. Actions are measured.	Roles are defined, but with team turnover. Outcomes are measured.	The RevOps team is viewed as a strategic partner. The team is aligned with the rest of org and provides strategic value.
<b>Process</b>	Manual process	Siloed processes where some processes are automated. Processes are Inconsistently enforced.	Employee and customer journeys are mapped. Friction points are defined with remediation plans.	The customer journey is seamless with clear handoffs between sales, marketing, and customer success.	Frictionless customer experience. "Next Best Actions" are defined by activity and health scores and hyper personalization
<b>Data</b>	Siloed data sources	Data is basic, not usable for decision-making.	Centralized CRM with real-time reporting and dashboards that track all go-to-market KPI's.	Internal and external data is aggregated. Data is used for strategic decision-making.	Automation and machine learning are utilized to provide a foundation for prescriptive analytics.
<b>Tech &amp; Tools</b>	No dedicated tech stack	Legacy systems are in place. Siloed purchasing & usage drives decisions. There are no cross-platform integrations.	Best-in-class systems are in place. There is cross-functional usage while most systems are integrated	Best-in-class systems are in place. All systems are properly configured and utilized.	Continuous testing & maintenance is standard operation procedure. The tech stack is fully aligned with the processes.
<b>Insights &amp; Analytics</b>	No measurement	Data collection and measurement is at the individual-level.	Cross-functional data is collected. Major data categories are tracked but with a bias towards actions instead of outcomes.	Cross-functional data is aligned. Analytics provides predictions on future revenue opportunities	End-to-end lead funnel measurement is in place. Attribution models are used. Actions are prescribed for revenue growth.

# Thank You

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If you have any questions completing this diagnostic tool or to dive deeper into specific challenges your organization is facing, [contact us](#)