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Oliviero Mottola  
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The Revenue Operations (RevOps) Framework: A Qualitative Study of Industry Practitioners.

Oliviero Mottola di Amato

Harrisburg University of Science and Technology

### **Abstract**

In recent years Revenue Operations or RevOps has emerged in professional circles as a new approach to manage Sales, Marketing and Customer Success teams in the context of b2b sales. In practitioner circles, RevOps definitions range from the increased collaboration of the three job functions to an all-out creation of job function within organizations. While the subject of interdepartmental alignment has been covered extensively in academia (albeit not exhaustively), RevOps as a term and set of practices has received no attention and industry practitioners struggle to find a unified set of best practices that isn't coming from organizations trying to pitch a product or service. As a first step and to provide some background we decided to perform a Multivocal style Literary Review to take advantage of grey literature such as blogs and industry reports. Following, a more formalized literature review serves to give a background in issues around organizational integration and alignment along with an exploration of the concepts of Sales, Marketing and Customer Success within organizations and how these are changing. We then performed an exploratory based interview study involving multiple RevOps professionals using the grounded theory approach to help guide our line of questioning as we interviewed practitioners and learned new concepts. As a main objective, we aim to produce a standardized framework to help practitioners understand the key tenets of Revenue Operations, how it may be implemented, what challenges organizations can face and provide researchers with a basis to explore the concept in further detail

*Keywords:* Revenue Operations, Sales Operations, Marketing Operations, Customer Success Operations, Alignment, Integration, Collaboration, Interface

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## 1. Introduction

In much of the b2b space today, most if not all of the interactions businesses have with their consumers occur online. With that, the consumer expectations have also shifted. A report from Clari, a technology solutions company, states “The way customers purchase products has changed. They’re conducting their own research well before a salesperson even reaches them. Plus, subscription-based business models mean what happens after the sales is just as important as what happens before” (Clari, 2020). In practice, this means much of the selling happens before a sales person even speaks to a lead. (Gartner, 2020). Similarly, a company sponsored report suggests 70% of the decision-making process is made before even taking to sales (Clari, 2020). Thus, in order for an organization to effectively “sell”, Sales needs to be more involved in marketing. Likewise, due to subscription services being so prominent, marketing needs to focus some of its efforts on customer retention activities instead of solely on customer acquisition. This means an increased level of collaboration between customer success and marketing is required. In a similar way, sales needs to be conscious of signing up customers that can become long term partners and must ensure hand offs to customer success are handled with care. Thus, as the existing barriers between these departments are breaking down, there is an increased need for data, technology and process overlap within the revenue organization (Sirius Decisions, 2020). Furthermore, the increased number of touchpoints a potential customer has with a company means it has also become increasingly complex to craft, manage and have control over the experience and journey the customers go through when interacting with a company. From the marketing perspective, this calls for increased tool adoption that measure all these touchpoints, increasing exponentially the amount of data that is generated by lead and customer engagements. Similarly on the Customer Success side, as society shift to more connected and smart products,

substantial amounts of usage data is becoming available and those managing the customer relationship are expected to be able to understand and anticipate the needs of the customers (Porter & Heppelmann, 2015). Likewise, Sales teams are enabled by sales automation tools, or social media, which allow them to reach greater audiences more efficiently. Thus, as these functional units increasingly specialize and focus on their areas of expertise, there is a natural tendency to silo one's area of knowledge and drift apart from other departments, busy with the implementation of a new tool or methodology. This brings us to another crucial aspect of why RevOps is becoming a must: technology stack complexity and disconnection in data between Sales, Marketing and Customer Success. In recent years we have seen an explosion in technology tools serving each of these departments. Marketing technology specialists Chiefmatec, publish a yearly landscape infographic. In 2018, this contained over 5000 companies. Today that number is over 8000 (ChiefMartec, 2020). This proliferation of tools is certainly great for teams that have the resources and expertise to manage a very complex stack. However, as complexity increases, so does specialization, leading Sales Operations (Sales Ops), Marketing Operations (Marketing Ops) and Customer Success (CS Ops) to become increasingly siloed from the technology perspective. Without effective integration amongst these tools, the aforementioned need for integrated experience delivery remains a mirage and companies will continue to lose against competitors whom have adopted an integrated approach for their revenue technology stack. Furthermore, if data remains siloed within a specific department, one cannot leverage any of the emerging artificial intelligence tools that are starting to emerge in the market such as Insightsquared or People.ai among others. These platforms require multiple data streams funneled into the same platform or database in order to generate any meaningful impact.

When considering the increased complexity of all the tools to be utilized, and the different metrics to be considered, a decrease in cross functional collaboration is bound to happen. Studies have shown that as the perceived complexity of a collaborator's Information Systems increases, collaboration across function declines (Rouziès, et al., 2005). The solution to these ailments seems to be Revenue Operations or RevOps. At its core, RevOps is concerned with identifying the most important tools and strategies to grow revenue, breaking down barriers and silos amongst departments and the prioritization of efficiency and accountability amongst Sales, Marketing and Customer Success (Scott Haney, Chilipiper, 2020). Clearly, many organizations are becoming interested in the subject of RevOps (Savic, 2017), and becoming a RevOps professional is surely attractive for operators, however there is little clarity around a unified framework that describes the key tenets of practice and any source professing to have the "ultimate guide" or a functional framework, is somewhat biased, as they often sell services to operators in the space.

Not only is RevOps itself hard to define with existing literature but there is also not much clarity in academia around the roles of Sales Ops, Marketing Ops and Customer Success Ops. Taken separately, Sales, Marketing, Customer Success, collaboration and Integration have all been explored by academics with various degrees of depth. However, the roles that surround key figures in these departments and the operational support these offer have not been explored in depth. One can only assume that until now, there was no need to specify with greater clarity how these roles are broken up within organizations and how their roles play in the success of companies. Nonetheless, the fact that this nascent area of RevOps calls into questions some of the traditional ways of managing Sales Ops, Marketing Ops and Customer Success Ops highlights how quickly the space is evolving and the relevancy of a study on the matter.

Sales as a practice has existed since the inception of business, however the consolidation of a set of practices for activities surrounding sales (Sales Ops) only really started to come into effect around the 1970's when Xerox created a Sales Operations group to take over tasks such as "planning, forecasting, compensation, and territory design" (Zoltners, Sinha, & Lorimer, 2014). In academia however, Sales Ops as a job function has not been an area of particular focus. Marketing, similarly to sales has been around for millennia, however a more formalized academic approach in the description of marketing areas and functions is something that started occurring only in the 20<sup>th</sup> century (Jones, D.G., Shaw, & E.H, 2003). More specifically, areas such as marketing measurement and analytics first started seeing the light of day in the 1950s and 1960s when the "Marketing Mix" was coined (Marketing Evolution, 2020). Like for Sales Ops, The Marketing Ops as a job function hasn't been covered by academics, however there is a substantial amount of knowledge that academics have devoted to marketing operations techniques such as marketing attribution. The details of these techniques however, are outside of the scope of this study. On the other hand, the role of Customer Success, stemming from Customer Relationship, Engagement and Experience management, is incredibly recent and has yet to be fully fleshed out as an area of research (Hiltona, Hajihashemib, Hendersona, & Palmatier, Customer Success Management: The next evolution in customer management practice?, 2020).

Furthermore, the concepts of greater integration and collaboration between these functional areas have not been addressed by academia with definitive frameworks. While Sales and Marketing integration is the area with most literature that describe best practices and models for collaboration (Rouziès, Anderson, Ajay K. Kohli, Weitz, & Zoltners, SALES AND MARKETING INTEGRATION: A PROPOSED FRAMEWORK, 2005), few academics have

explored integrations between Sales and Customer Success (and other related areas before that) and even fewer have touched on Marketing and Customer Success. This makes it extremely challenging for operators in the space to understand how one would attempt to increase this “greatly heeded” cross functional collaboration.

With all this in mind, the RevOps space can be observed from three different perspectives: **operators** want the benefit of calling themselves RevOps professionals, however the lack of an established framework creates confusion when trying to learn the principals of the space. Furthermore, the fact that RevOps is concerned with topics in the space of Sales Operations, Marketing Operations and Customer Success Operations, which are entire areas of knowledge themselves (albeit ill defined, as described previously), sets a very steep learning curve for anyone wishing to join the ranks of RevOps. When coupled with the proliferation of tools that serve these job functions, and the complexities associated with managing such a large IT stack, the prospect of becoming a RevOps professional is daunting to say the least.

**Executives** who wish to implement these practices are left equally in the cold. Without a standardized set of best practices, it makes it hard to understand how to implement the model and how to assess the successful implementation of said practices within their organizations.

Moreover, there is little to no literature on what difficulties one will encounter in the transition to this new model from their current modus operandi. In addition, due to the complexity touched upon earlier, there is a consistent skills gap in the workforce for revenue leaders (Savic, 2017).

Finally, aside from the aforementioned company sponsored industry reports, while there is proof in general that a lack of integration across teams inhibits success (Hughes, Bon, & Malshe, 2012), there is little empirical proof that the adoption of RevOps policies will deliver on the promises of increased, more predictable and stable revenue.

**Academics** are similarly situated when attempting to grasp the concepts of RevOps. The term RevOps has not been utilized in academic literature before, at the time of writing this essay, and as no researchers have ventured in this area, there isn't even a research agenda for academics to follow in exploration of the space and building of constructs.

Given this context, this study will attempt to consolidate some of the knowledge introduced above, namely in the areas of Sales Operations, Marketing Operations, Customer Success Operations, Organizational Integration, alignment and collaboration and naturally, provide a foundation for the area of Revenue Operations. As part of the study, through this process of knowledge consolidation and a series of Interviews, we will attempt to obtain answers to the following research questions:

*RQ 1:* How practitioners define RevOps and is there a unified model of RevOps across organizations?

Posing this as an introductory question is key to understanding the depth of knowledge practitioners have around the subject. In the context of the output of this research, understanding the status quo of RevOps will serve any neophyte looking to enter the space, help executives form a basis understanding of the practice and aid researchers with a set baseline for future enquiry.

*RQ 2:* How are RevOps principals being implemented by organizations, and more specifically, how are organizations ensuring greater cross functional integration?

This question is important as it will provide practitioners with some real-world examples of implementations of RevOps principles and will moreover, contribute to the scarce literature surrounding the interface of Sales, Marketing and Customer Success in all their permutations.

*RQ 3:* What challenges do organizations face when implementing RevOps and how are firms measuring for a successful implementation of said practices?

As for the second inquiry, the answers to this question will serve to bolster literature around challenges in the implementation of cross functional collaboration and alignment practices in the context of RevOps, Sale, Marketing and Customer Success as well as hopefully providing a set of metrics or modes of measurement for practitioners to assess whether their RevOps initiatives are working as intended.

*RQ 4:* Does RevOps represent a new construct and a departure from the concepts of Sales, Marketing and Customer Success Operations, particularly in the context of cross functional and inter organizational alignment or is it merely a marketing ploy, voted to rebrand a set of practices already consolidated in academia and in industry environments?

The answer to this fourth question is important as it will bring validity and credibility to the space, giving practitioners and academics a “green light” for implementation and continued advancement and inquisition of RevOps constructs and articulations.

*RQ 5:* Are there measurable benefits from the adoption of RevOps and is RevOps relevant to all businesses?

The fifth and final question is the real crux of the entire study as it provides, at least in the context of a first inquiry, proof of whether there is value in the application of such frameworks and whether operators should pursue a career in the space, if executives should attempt to implement the strategies and whether researchers should continue in the contribution to the problem space.

Furthermore, as a result of this inquiry we hope to produce a set of new questions and begin the formation of a more robust research agenda for scholars to investigate and contribute to this nascent area.

More concretely, to achieve these results, and given the lack of extensive peer reviewed literature, we will initially perform a Multivocal style Literature Review to help frame a background in RevOps, taking advantage of technical documents sourced online as well as industry reports. Following this background analysis, a more formalized literature review will help us understand the principles and practices of Sales, Marketing, Customer Success and their operational functions as well as dive into the existing frameworks for alignment, collaboration and integrations of different functional areas within organizations. Following the Grounded theory approach, we begin open coding the available works and create a baseline of knowledge to be used for the next step of our research. Once coded, we shall perform an exploratory interview case study of multiple industry professionals who are currently adopting RevOps principles. Again, using a grounded theory approach we expect the line of questioning to evolve as more knowledge on the space is uncovered through this exploratory process. The hope is that this paper will contribute to the research and practice of RevOps by providing a guided framework of the available knowledge surrounding RevOps and a validation of said findings through interviews.

## **2. Background**

As explained in the introduction, RevOps is still in a nascent phase and thus the only available literature comes from professionals in the space who are engaging with the community and sharing their knowledge or by companies who sell solutions to Sales, Marketing and Customer Success operations practitioners. As previously postulated, an integrated experience



for the consumer, calls for an integrated set of practices amongst internal departments and an overlap in the traditional functions. While marketing used to be exclusively worried about top of the funnel activities and customer acquisition, marketing is now involved throughout the lifecycle, from first touchpoint to churn prevention. Sales is now much more involved at the earlier stages of the lifecycle utilizing social selling practices to engage buyers at the awareness stage of the customer journey. Lastly, Customer Success will have visibility into new customers to be onboarded and their journey to becoming customers by having greater access into sales and marketing tools. In addition, as part of an effort to align incentives, Customer Success will benefit from smoother customer handoffs, as sales metrics will be tied to aspects such as handoff quality, in order to sustain a delightful experience for the customer throughout the process.

From this initial background inquiry, it doesn't seem that all companies adopt RevOps in the same way or at least have a completely aligned understanding. At the highest level we see definitions of RevOps as model focuses on the alignment of goals between Sales, Marketing and Customer Success in order to achieve a greater acceleration of growth and revenue, greater accountability during cross functional collaboration and increased revenue forecasting predictability (FunnelCake, 2020). Others believe RevOps to be a "Glorified term for Sales Ops" or four distinct pillars: "Sales, Marketing, Operations and Customer Success", while another group dubbed RevOps as "Sales and Marketing Alignment 2.0" (Sales Hacker, 2018). Similarly research firm Sirius Decisions describes RevOps as "a combination of sales, marketing and customer success operations teams that work together according to a set of defined operating principles to maximize revenue and performance" (Sirius Decisions, 2019). Furthermore, as part of the framework, RevOps calls for an integrated approach in the management of KPIs as well as the technology stack, an arduous task, given the amount of cross functional stakeholders

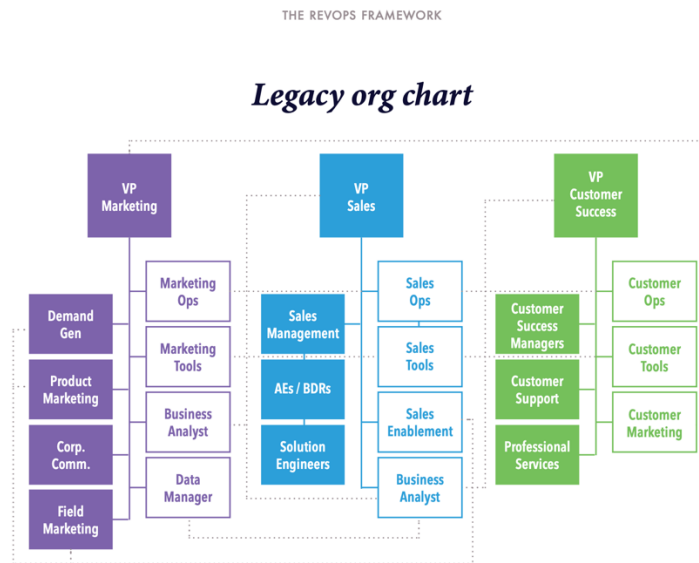
involved and an ever-growing ecosystem of vendors serving marketing and sales and customer success teams (Martec, 2020).

Other definitions are more specific and voted to the effect the practices have on the customer, saying that the RevOps teams should work in support of any revenue related operations, aimed at delivering an integrated experience for any person interfacing with an organization, from the awareness phase, all the way at the top of the funnel, down to interactions with customer support of the finance team (Digitopia, 2020). The goal is to delight customers at each touchpoint and to offer an integrated experience, delivering value at each stage.

Other practitioners focus more on the output of RevOps, stating that with regards to KPIs, RevOps is concerned with making sure that the metrics utilized by the three teams are determined in a way that increases accountability across departments and creates a sense of cohesiveness amongst the teams (Clari, 2020). Finally, some go so far as producing an entire framework for RevOps, coupled with a re-shuffling of the traditional organizational chart. In their minds, RevOps brings together 4 areas of responsibility from departmental silos: Operations, Enablement, Insights and Tools (Savic, 2017).

In the legacy model, Marketing, Sales and Customer Success benefit from dedicated support functions such as Marketing Ops and Business Analysts or Sales Ops and Sales Enablement as shown in Figure 1.0.

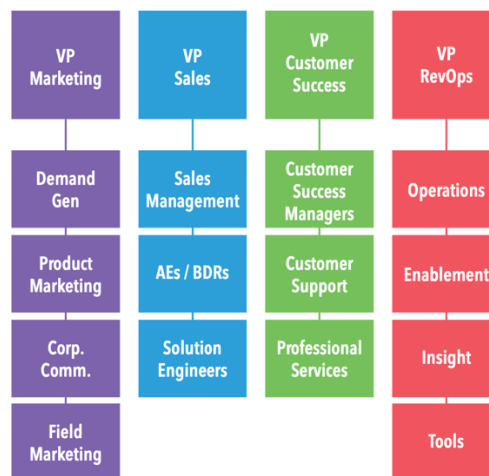
Figure 1 (Savic, 2017)



In the proposed model, all support activates are rolled up under one RevOps leader, responsible for Operations, Enablement, Insights and Tools as shown in figure 2.0.

Figure 2.0 (Savic, 2017)

**Org chart with RevOps**



It seems therefore that the current understanding of RevOps is varied within the industry. It is not entirely clear if there is a shared set of metrics being tracked by all organizations, and furthermore, other than “sharing KPI’s” there isn’t a wealth of information available as to how one may implement RevOps for their organization and what other norms and conventions should be deployed. Furthermore Savic, is the only one who even advocates for a breakout of RevOps functions from traditional organizational structures and other definitions of RevOps don’t go into the specifics of how to think about all the different functional areas of Sales, Customer Success and Marketing Operations would evolve under the RevOps framework. Moreover, the idea that RevOps is a completely new construct instead of a re-hashing of old practices is not entirely clear, as some practitioners seem to note.

More comfortingly, it seems that an analysis of the benefits and issues RevOps is solving find more “alignment” within the industry, for lack of a better term.

Company sponsored researches are consistently showing that adopting a revenue operations framework can accelerate revenue generation and create more profits. A research report commissioned by Sirius Decisions in 2019 showed a correlation between companies adopting the RevOps framework and revenue growth. Specifically, from 2017 to 2018, companies in the S&P500 which adopted the model experienced 19.5% revenue growth vs 7.3% for those that didn’t (Sirius Decisions, 2020). The report also cited increased average stock performance for “RevOps have” companies vs “RevOps have nots” companies. Ultimately, the report identified that “companies with an aligned revenue engine grow 19 percent faster and are 15 percent more profitable” (Sirius Decisions, 2020). Similar research by Forrester seemed to indicate 71% higher stock performances for companies adopting the RevOps framework (Forrester, 2019). Likewise, Clari supported research indicated 19% faster growth and 15% more

profits from companies adopting the RevOps model (Clari, 2020). This seems intuitive, since as we outlined in our introduction section, studies have shown that the lack of integration across sales and marketing teams affects business performance negatively (Rouziès, et al., 2005). However what is not clear, is the effect that integrating Customer Success Ops provides any benefit at all since the practice is relatively new. Moreover, are the companies benefiting from revenue increases merely adopting already existing frameworks for Sale and Marketing integration or are they following RevOps specific instructions and practices that provide unique benefits outside of the what is described by the current literature on Sales and Marketing collaboration.

Another highlight, and a particularly important one when one considers the complexity of the Sales, Marketing and Customer Success technology stacks is that RevOps seems to address the “Management Skills Gap”. The theory goes that in the past, a CMO or Marketing VP was an expert of product marketing, branding, demand generation and content marketing (Savic, 2017). Today however, a marketing executive would be expected to have expertise, other than in the strategic fundamentals of marketing, also in a variety of technology tools, which as mentioned previously keep growing at a chilling pace. The same is true for the Customer Success and Sales leaders in a company. By adopting the RevOps framework, a CMO or CSO can leverage the expertise of a team solely focused on executing the vision provided by leadership in a strategic and technology enabled way. Savic is the only to surface this issue, however it is a critical one because as mentioned in the introduction, when the perceived complexity of information systems increases, teams tend to drift apart and become more siloed (Rouziès, et al., 2005). If indeed one of the issues RevOps is trying to solve is prevent teams from being siloed, addressing the skills gap is a key to achieving success in terms of alignment.

With siloed organizations comes also duplication in effort and dispersion of resources. As separate teams build and maintain their technology stacks, they start developing substantial overhead costs, sometimes for tools which offer the same benefits. In fact, as many sales or marketing tools battle for market share and differentiation, these services often offer features that overlap in value proposition, creating useless wastes between two teams which could simply be utilizing one tool. Having the responsibility of tools and technology managed by one department will ensure streamlined procurement efforts and an overall reduction in costs. From our research we have not encountered any analysis by RevOps practitioners around these points which further highlights the dearth of development of RevOps frameworks and constructs.

As part of the following sections, we will try to uncover what are some of the best practices for cross functional integration, alignment and collaboration and which techniques are best suited to successfully align teams. Furthermore, we will explore in greater depth what the current practices of Sales, Marketing and Customer Success Operations look like. This will help guide us as we interact with RevOps professionals and provide a basis of understanding of how the current model might change as RevOps practices pervade the industry.

### **3. Literature Review**

#### **3.1 Sales, Marketing and Customer Success Operations. Is this the end?**

As RevOps calls for greater alignment in the aforementioned categories, an effort must be made to define these, understand their current operations practices and objectives so if practitioners, and researchers wish to compare or analyze RevOps in the context of these functional areas, they have a frame of reference to point back to. Furthermore, if we are to determine through our research whether RevOps is a departure from the Concepts of Sales,

Marketing and Customer Success Operations we must first understand the nature of these constructs. A foreword, before heading into any of the three directions, one peculiarity observed when performing research in each of these areas is that none of the literature on the aforementioned constructs ever attempted to break out the operational functions from the greater functional area. There is therefore no mention in academic literature of the concept of Sales Ops but rather any sales related activity falls under the umbrella of Sales. The same is true for the other areas of knowledge, respectively. We can only speculate as the reasons behind these decisions, however, the mere fact that these areas are not broken out as separate areas of research pinpoint how little is known of this specific problem space and how much fertile ground exists for researchers willing to explore the area. As a final note, we wish to specify that this study's intention is not to perform a deep dive into every single aspect of Sales, Marketing and Customer Success Operations but merely understand their broad stroke objectives, practices and utility, in order to inform the further investigation of RevOps. For a more complete unpacking of each of these areas, researchers would be better served by analyzing in more depth some of the papers cited in the following section.

### **3.1.1 Sales Ops**

The practice of Sale Operations (Ops), as highlighted in the introduction started growing around the 1970's when Xerox first broke this out as a separate functional area (Zoltners, Sinha, & Lorimer, 2014). The fact that Sales Ops is not broken out as a separate function in academic literature makes it hard to attribute certain tasks that are described under sales to Sales Ops, however, when performing research in grey literature, it is clear that any action that is not strictly client facing is most likely performed by Sales Ops. For this reason, while some of the following

concepts may be attributed to Sales in academia, the reality is that academia is not making that distinction for us while industry news or technical documentation clearly shows whose purview these activities are actually under. From the research it has emerged that Sales Ops is responsible for a number of activities, such as and listed in no particular order: identifying and removing blockers, maximizing revenue and increasing the effectiveness of the sales force (Rodríguez, Svensson, & Mehl, 2020), guiding sales in areas of pre-selling such as prospecting and qualifying and selling related activities such as negotiation, handling objections and presenting (Guenzi & Habel, 2020). Sales Ops also manages any sales automation systems as well as the CRM and business intelligence activities surrounding the sales team (Thaichona, Surachartkumtonkuna, Quacha, Weavena, & Palmatier, 2018). Moreover, other activities include general planning of day to day operations adept to increasing efficiency, budgeting (12,15) as well as sales forecasting which helps with planning and provides transparency within other departments (12). In addition, Sales Ops is consistently engaged in sales process definition and improvement as well as focusing on enabling the sales team with the right materials and techniques to do their jobs (Thomas L. Powers & Gupte, 2010). In fact, enablement is an entire area in in it of itself that Sales Ops is dedicated to as part of their role in assisting Sales teams. If one wishes to learn more about Sales Enablement, a recent paper has defined a framework and set an agenda for researchers moving forward (Rangarajana, Duganb, Rouziouc, & Kunkled, 2020). Finally, sales ops is tasked with the analysis of all the data that is generated by these activities (Hunter & Jr., 2007). In summation, to perform their job, Sales Operations deals with and manages tools such as: spreadsheets, relational databases, sales automation tools, sales forecasting tools, inventory management systems, contract management software, email, phones and telecommunication devices as well as data analytics software (Hunter & Jr., 2007) all



devoted to increasing the operational efficiency of the sales team. The sheer amount of responsibilities makes therefore the Sales Ops professional a jack of all trades by definition. Notably, an article named “Why Sales Ops Is So Hard to Get Right” (Zoltners, Sinha, & Lorimer, 2014) highlights the difficulty in hiring for positions like these that require such a breadth of skills, which often can be in contrast. For instance, many of the skills highlighted above such as coaching with sales related activities and optimization of process, required a deep knowledge of the design of sales strategies. This kind of problem solving is found in individuals who are creative and enjoy the variety of various jobs. On the contrary, many of the operational activities can be considered more mundane and would generally be associated with someone who craves quality control, is technically adept and enjoys the nature of repetitive work (Zoltners, Sinha, & Lorimer, 2014).

This brief overview should serve as an introduction to the various activities that Sales might be performing. Clearly there is a degree of specialization involved in performing tasks such as these. Increased specialization forcibly increases a degree of information asymmetry with other departments. Given these findings, the idea that Sales Ops is somehow “out of sync” with Marketing Ops and Customer Success Ops is entirely plausible, and thus RevOps might be on the right track when calling for further collaboration. Following this section, we shall explore the area of marketing operations, trying to understand their objectives and day to day activities.

### **3.1.2 Marketing Ops**

Such as in the case of Sales Ops, we observed that academic literature does not single out the Marketing Ops professional but merely refers to industry practitioners as marketers. Thus, for the purpose of this study we should consider that any corollary activity which does not entail higher level strategy work with less technical skills involved, will be covered by the Marketing

Ops function. Just as it is peculiar with Sales Ops, this highlights how much can still be unpacked of the Marketing Ops professional's toolkit and best practices.

Out of the three areas analyzed in this section, Marketing Ops is probably the one that has benefitted the most from the recent explosive pervasion of technology in business and society. This is in particular due to the degree of success of social media platforms, which have a clear advertiser focus and thus are engrained in the bread and butter for the everyday marketing ops professional. Today the marketing professional can benefit from a multitude of interactions with potential and current customers, thanks to the various ways in which firms interact with the outside world. Users can perform research on social media, blogs, company websites, walk in stores etc. This is of course great for marketers as they have the opportunity to influence the customer in many occasions. However, it conversely means that there is the possibility for negative exposure to content which may damage the relationship with the customer. Hence, as outlined in the introduction, it has become increasingly complex to manage, control and craft the customer's journey (Steinhoff & Palmatier, 2020). Another aspect unique to how marketing has evolved is the degree to which firms are capable of knowing who they are interacting with, before they even have a commercial relationship. This is because as opposed to the past where TV ads or billboards were displayed to millions of people (Vieira, Almeida, Agnihotri, Silva, & Arunachalam, 2019) without knowing whether the ad had any effect on who saw it, today, marketers are able to attribute buyers to those who were exposed to an ad, at least in part (Buhalis & Volchek, 2020). It should be noted that the concept of marketing attribution is an entire field of research which has been developed extensively and will not be addressed as part of this study. Today, marketers are involved in the practice of harvesting vast amounts of data related to the various interactions leads or customers have with any piece of marketing material

available online, whether it be a website, blog, social media account (al., 2020). More specifically, Marketing Ops engages in activities around, email marketing, search engine optimization, display advertising, blogging, the arrangement of web conferences, the management of paid media, customer segmentation and marketing attribution (Vieira, Almeida, Agnihotri, Silva, & Arunachalam, 2019). In addition, Marketing Ops professionals might find themselves creating and managing anthropomorphous agents also known as chatbots, which support incoming information requests regarding the products or services a company may be offering (Steinhoff & Palmatier, 2020). Similarly to Sales Ops, Marketing Ops has thus purview over a multitude of tools and responsibilities and the plethora of tools at their disposal (Ganev, 2017) will require a significant degree of expertise in the area. It should be noted, that like Sales Ops, the role also requires somewhat of a duality in nature. While traditional marketing is concerned with areas of psychology, digital marketing requires hard skills that are process oriented and repetitive in nature, just like for sales Ops. Many of these activities involve the management of technology products as well as analytical skills to extract insight out of the raw data. Again, it thus seems plausible that marketing and marketing ops specifically may be operating in a silo, losing touch with other functional departments in the revenue organization. Interestingly, one commonality in the Sales Ops and Marketing Ops professional is this duality and in particular the need to have very developed “hard” skills, notably in the area of data analytics and system administration. This fact may be a first indication that the concept of centralizing marketing ops and sales ops under one umbrella that manages Systems and Insights might be a sound approach, validating the framework proposed by Savic in the RevOps section of this study.

In the following section we shall explore the area of Customer Success and the operations surrounding the functional area.

### **3.1.2 Customer Success Ops**

The concept of Customer Success is easily the most nebulous of the three constructs, since academic papers have only recently started to acknowledge its validity as a new framework for the management of Customer Relations (Hiltona, Hajihashemib, Hendersona, & Palmatier, Customer Success Management: The next evolution in customer management practice?, 2020). Due to the area being in its' infancy it is not surprising there is no distinction between the different types of industry practitioners, just as was the case with Sales Ops and Marketing Ops professionals. The available literature seems to indicate that the rise in this construct is due mainly to the fact that as products have evolved and are now interactive, and generate substantial amount of usage data that can be traced, companies now need an advocate for the customer that is consistently monitoring how the customer interacts with the product and the company (Porter & Heppelmann, 2015). This is especially true in the context of subscription businesses where renewals are in focus and not only new customers. Thus, one of the main responsibilities for the Customer Success team is to reduce churn and maintain the current customers happy. Furthermore, Customer Success does not replace Sales, however they do take over the practices of managing the customer once they enter in a commercial relationship with the company. From then on, the Customer Success agent will be focused on “monitoring the usage of the product to gauge the customer’s value capture and identifying ways to increase it” (Porter & Heppelmann, 2015). Interestingly, by design, the role should collaborate closely with the Sales, Marketing and Service functions (Porter & Heppelmann, 2015). Particularly fascinating about the new paradigm

of connected products is that since companies are able to retain contact and close relationship with the customer through a product that is used constantly and monitored, “Companies are beginning to see the product as a window into the needs and satisfaction of customers, rather than relying on customers to learn about product needs and performance” (Porter & Heppelmann, 2015). In a way, it seems that companies are much more engaged with their customers and are able to empathize with their customers to a higher degree thanks to technology. The concept of empathy in customer success is an interesting area that should be explored by academics if it hasn’t already. This increased concern for customer success may be connected to the rise in “Customer Obsession” tactics pioneered by Amazon (Amazon, 2021). Thus, when considering the day to day activities of the Customer Success Operations Manager, these will be inevitably involved in activities surrounding CRM software in order to enhance the relationship (Hiltona, Hajihashemib, Hendersona, & Palmatier, Customer Success Management: The next evolution in customer management practice?, 2020). Furthermore just like with Sales and Marketing Ops, there is an innate degree of hard skills required to perform well in the role, with activities such as measuring Net Promoter Scores (Dvo, 2 May 2016), or analyzing call log data in order to predict and reduce churn (Vo, Liu, Li, & Xu, 2020). Particularly useful in understanding the role of Customer Success is the framework proposed by (Hiltona, Hajihashemib, Hendersona, & Palmatier, Customer Success Management: The next evolution in customer management practice?, 2020). That sees Customer Success engaged primarily in: Goal Management, Learning Management and Stakeholder Management.

What is most fascinating of the role of Customer Success is that it seems to have been entirely engineered for a new age of technology embedded products. If we consider its infancy, it is clear why there have so far been no frameworks for the greater integration with its

counterparts in Sale and Marketing. Furthermore, the idea that a new framework for managing and optimizing a revenue organization such as RevOps is required, is starting to look somewhat prescient. Moreover, the common thread that connects these three functional areas seems to be that of System administration and analytics capabilities. These findings, as we suspected, seem to indicate that indeed there may be an argument for Sales, Marketing and Customer Success to house their system administration and analytics or insights job functions all under the same managed team, thus increasing opportunities for data and knowledge share, integration and cross team collaboration, which we understand to be beneficial for business performance.

This dive into the world of Sales, Marketing and Customer Success Operation has made it clear that each of these constructs have very specific and specialized skills required in order to succeed. Our hope is that by surfacing these constructs and consolidating these in one location, researchers and practitioners will be able to utilize this section of the study as a starting point to further their knowledge in each of these problem spaces. Particularly for practitioners early in their careers, it would be advisable to continue researching some of the papers cited in this section.

It is easy to see how these departments may be drifting apart as they continue to hone their craft and go deeper down the proverbial rabbit hole. At this point with the available information, it is becoming clearer how RevOps fits into the puzzle of Revenue. Namely, rather than representing a complete departure from the practices of these three functional areas RevOps can be seen merely a set of practices aimed at facilitating the roles that these three have in organizations and increasing the efficacy of the three areas by making them “sing in tune” or “dance to the same beat”. In light of these considerations the next logical section will entail the exploration of the concepts of Alignment and Integration in business.

### **3.2 Organizational Alignment and Integration**

Due to the mounting evidence pointing to the fact that RevOps is really a “feat” of alignment within the revenue organization, we feel the need to address this area to a certain degree of depth, surfacing definitions, understanding why organizations should strive for greater integrations and then provide a robust set of best practices for integration and organizational alignment. We will then proceed to consider how the RevOps framework fares against the backdrop of the current literature on alignment.

#### **3.2.1 Definitions of Alignment**

We chose to focus on the word alignment as this is what many RevOps advocates use to describe an increased interdepartmental collaboration, however in the context of RevOps, alignment is not exhaustively qualified as a term. Furthermore, it is unclear whether alignment is utilized in the same way as academics view the concept of alignment. The area of organizational alignment is considered a broad topic, spanning different fields of study and spread across a multitude of journal sources. There is also no dominant definition and we can find a substantial level of overlap in definitions between alignment, integration, coordination, and interface (Sombultawee & Boon-itt, 2017). Alignment is used often in managerial settings leaving however opaque definitions of the concept. Some believe it to be the capacity to work together on strategic implementation, others see it as a simple close working relationship or cross functional interdependent (Sombultawee & Boon-itt, 2017). Definitions for integration follow similar lines: the concepts can be seen as the utilization of strategic goals to drive process and activity integration within a functional area and across functional areas (vertical vs horizontal integration) (K.A.Weir, A.K.Kochhar, S.A.LeBeau, & D.G.Edgeley, 2000). Similarly, the concept of coordination can be described as utilizing resources towards the same goal and

avoiding resource replication in the pursuit for an enhanced customer experience (Narver & Slater, 1990). As one unpacks more definitions, probably the ones that most resemble the concepts that RevOps advocates are trying to convey are the concepts of Interface and Cross-functional Collaboration. Interface can be described as a set of systems that operate across functions within an organization, at the tactical, strategic and operational level which enable increased coordinated action (Parente, 1998) while cross functional collaboration is described as departments working together to cooperate, share resources and information in the pursuit of a common goal (Claro & Ramos, 2018). While we cannot definitively state that RevOps is advocating for one of these concepts over the other, we feel comfortable in stating that in the context of the proposed RevOps framework we can consider alignment, integration and cross functional collaboration to be a set of practices, processes and systems that enable teams to work together more efficiently and with more focus in the pursuit of a set of common goals. Having gained an understanding of these concepts, and to bring utility to these areas, it is important to underline the motivations behind such sets of practices.

### **3.2.2 Motivations for Alignment Integration and Cross functional collaboration**

The benefits of working together don't only belong to the world of business. In fact, when one looks at sports for example, teams that play as a "team", often are the ones to prevail. Similarly, in the world of academia and in connection with business, there is a considerable amount of literature pointing to the benefits of Alignment and integration. Many studies have shown the positive correlations between integration and business performance, financial performance and overall corporate growth (Rouziès, Anderson, Ajay K. Kohli, Weitz, & Zoltners, Sales and Marketing Integration - A Proposed Framework, 2005) (Biemans, Brenčič, &



Malshe, 2009) (Madhani, 2016). An increased level of interdepartmental collaboration is thus seen as a source of competitive advantage, leading companies to create more value for their customers compared firms that are not in alignment (Biemans, Brenčič, & Malshe, 2009) (Madhani, 2016). Furthermore, there is evidence that companies that align across departments are able to respond and adapt more quickly to the needs of their customers. This is particularly poignant considering the pace at which the business environment is changing and the rate at which consumer wants and needs fluctuate. Lastly, studies have shown that as information sharing improves within an organization, organizational learning also improves, which bring people on the same page and allows for more effective innovation and product development (Biemans, Brenčič, & Malshe, 2009).

As businesses continuously seek a competitive edge in the marketplace, if one observes RevOps as a force of integration, alignment and cross functional collaboration, there is mounting evidence pointing to the fact that closer alignment of Sales, Marketing and customer success can help business succeed by not only differentiating themselves by their products and services but also in the way these are delivered to the customer as part of a cohesive and integrated experience. This final consideration is key if one considers the environment that stemmed the RevOps way of thinking: Today's customers demand an integrated and curated experience that is relevant and pertinent to the buyer and RevOps may well be a key in delivering said experiences. Having understood that integration and alignment can be used to gain an edge in the market, the next logical step for executives trying to increase integration within their organization is to understand exactly what set of practices will help achieve alignment.

### 3.2.2 How can teams align?

Achieving alignment can be done in different ways. However, if there is one underlying aspect which is absolutely crucial for organizational alignment and cross functional integration it's the importance of executive and senior management support of any initiatives trying to promote cross functional alignment. Without senior management buy in and endorsement, companies will not be able to achieve the cultural, structural and systematic changes that are required in order to achieve organizational alignment (Rangarajana, Sharmab, Paesbruggehec, & Bouted, 2018) (Meunier-FitzHugha & Laneb, 2009) (Madhani, 2016). Senior management is responsible for creating a culture where sharing information is seen as a positive as well as hiring and promoting people who are open minded team players, who feel that the act of collaboration is not a drain on their resources but rather a way to enhance personal and company performance (Rouziès, Anderson, Ajay K. Kohli, Weitz, & Zoltners, Sales and Marketing Integration - A Proposed Framework, 2005).

The foundational paper in the field by Rouziès et al. tells us alignment practices can have a structural nature, meaning they impact the way organizations are designed and employees situated within the company. In Rouziès view of alignment, companies may choose to create cross functional teams, where members of different functional departments are part of the same team. The idea is that by working in constant contact with each other, teams will be able to appreciate different perspectives and avoid conflicts which inevitably occur when things don't go as planned. Similarly, the research suggests that having different departments roll up under a common person can force different departments to collaborate more closely. This particular recommendation is made by Rouziès in the context of a Sales and Marketing Interface study. For obvious reasons Customer Success is not included (the study is from 2005 and Customer Success

is still in its infancy), however, the same concepts are applicable today the broader revenue organization. In fact, bringing Sales, Marketing and Customer Success functions under the revenue umbrella is exactly an attempt to foster integration under one common leader, the Chief Revenue Officer (CRO). Thus, if the CRO is the leader that acts as the central reporting figure for cross functional teams, RevOps, in the context of Structural changes to foster alignment, can be seen as playing the role of an Integrator. If we observe the Sales and Marketing interface study by Rouziès, Integrators are figures appointed by the company to facilitate the integration of cross functional teams (Rouziès, Anderson, Ajay K. Kohli, Weitz, & Zoltners, Sales and Marketing Integration - A Proposed Framework, 2005). Taken all together, these sets of structural changes seem extremely in tune with the idea of RevOps proposed by some industry practitioners, that sees the operational functions of Sales, Marketing and Customer Success, broken out into a separate team (the cross functional team), an integrator utilized to streamline collaboration and communication (RevOps) all rolled up under the purview of one figure, the CRO. The construct proposed by Rouziès also seems to indicate that an integrated set of goals, with shared visions and KPIs will aid teams that are striving for integration and alignment within their organization. Again, the available literature on RevOps is in tune with this framework, pointing to the fact that while RevOps may be a legitimately desirable framework for businesses to implement, it might not represent a complete departure from current constructs but rather an evolution of the current literature on the Sales, Marketing and Customer Success Interface. The current RevOps literature does however not account for all best practices that can help achieve integration. From what we have read, closer integration means an overlap in understanding of concepts and perspectives and closer relationships. According to Social Network theory, Strong Ties, promote trust, more willingness to work together and share information (Claro & Ramos,

2018) which is why some advocate that in general even though teams might not operate in cross functionally or work under the same leader, it is important to create touchpoints for members of different teams to interact and share ideas. This will lead to high quality information sharing and an easier access to information and tacit knowledge. Similarly, the practices of shared learning within organizations allow employees to form a unified base of knowledge that they can build upon and help form a narrative that considers multiple perspectives across various teams (Madhani, 2016). Lastly, Madhani's same study showed that by explicitly calling out and visualizing the ways in which teams interact with the use of flowcharts and diagrams, can greatly enhance the ability of teams to work together, as it provides the clarity needed to operate daily, without losing track of the fundamentals under which the teams are supposed to be collaborating.

Thus, as part of our literature review, there seem to be substantial overlaps in the way we dubbed RevOps as a feat of cross functional integration and the way the available academic literature defines the idea of cross functional collaboration and intra organizational alignment. RevOps meets many of the tenets of a Sales and Marketing Interface, with the added layer of throwing Customer Success in the mix.

As we now have further understanding of the constructs that surround the practices of RevOps, we feel we have the basis and grounds to go into the field, collect and analyze data in the pursuit of answering the research questions we have posed for ourselves. The following sections outlines some of the techniques we intended to utilize to reach that objective.

#### **4. Research Design**

For this study we evaluated the possibility of performing a standard Systematic Literary Review (SLR), however, given the lack of academic research in the space and the speed at which the state of the art is evolving, a SLR was not adequate and thus we opted to utilize both a Multivocal Literary Review and an exploratory based, semi structured Interview process where participants are purposely picked, in order to hear concepts of RevOps directly from those whom are putting the practices to work.

##### **4.1 Population/Field Site**

Due to the highly specialized nature of the subject matter, we decided to adopt an Exemplary Methodology (Bronk, King, & Matsuba, 2013) for the selection of our interview subjects, as it is outlined in the seminal paper on the subject by Bronk et. Al. Following this reasoning, the subjects needed to have expertise in the area of Revenue generation, specifically, those operating in Sales Operations, Marketing Operations, Customer Success Operations and obviously Revenue Operations. The ideal candidates to recruit revenue leaders (Chief Revenue Officers), however due to the seniority of the position, we did not exclude substantial challenges in recruiting such candidates for the study. By selecting an exemplary sample population, we believed we had higher chances of examining and understanding the constructs we are trying to define, explore and report about. Another benefit of selecting the exemplary methodology is that we were able to hear recounts of the “leading edge development” (Bronk, King, & Matsuba, 2013) of RevOps directly from the experts who are pioneering its values.

We expected our population to have a relatively high degree of education, with however, a multitude of background and work experience. Age was an interesting variable to observe. While we didn't want to place any specific restrictions to age, given the complex nature of the role, we expected the majority of participants to have a few years of experience under their belt. As we mentioned in our literature review while describing each of these functional areas, the job requirements are so diverse that one often sees many different types of people performing well in their roles. To recruit the participants, we utilized social networking app LinkedIn, and a few communities in Slack as well as scheduling tools such as Calendly. Throughout this initial research, I have found that subject matter specific slack communities are a great way to identify engaged people who are willing to put in the time to share knowledge and grow the space. Our expectation was that these two recruitment methods produce the right set of candidates for the study. While with LinkedIn we were able to surgically select current thought leaders in the space and identify those who are more vocally supporting the practices of RevOps, Slack communities centered around Sales Ops, Marketing Ops and Customer Success Ops allowed us to gain the perspective of those who might be familiar with RevOps or part of RevOps teams but still conserve a functional identity tied to their role. For this particular reason, we believed it interesting to observe how they viewed the practice of RevOps in relation to their specific functional area. One non-conditional factor to participating in the study is that the participant needed to be working or have worked in an organization where RevOps is being applied. To be specific, this means that either there needed to be a RevOps leader in the organization or members of the organization were purposefully implementing RevOps practices.

## 4.2 Data Collection

An initial Multivocal literary review, allowed us to observe and gain understanding from a variety of non-academic sources and help us create a first layer of theme coding connected to our Research Questions, which guided a more traditional literary review. We adopted a qualitative approach to the research. When reading the available literature, we applied a code to each source and as new codes emerged, checked against existing codes to make sure the knowledge should not be grouped in an already existing category. This process was done with the aid of a google spreadsheet. We feel these codes represent the broad themes available by observing the available literature on RevOps

This initial coding identified key topics presented in Table 1:

Table 1

### Preliminary Coding

Code	Justification
Alignment/Cross Functional Integration	This topic seemed particular poignant considering most of the grey literature we found was focused on teams from different functional areas working more closely together.
Customer Success Operations	The role of Customer Success operations was amply mentioned in the context of a functioning modern company.
Data & Analytics	Data and data analytics also seemed a prevalent topic on minds of those advocating for RevOps. Many discussed a need for processing data and making sense of the data.
Marketing Operations	The role of Marketing operations was amply mentioned in the context of a functioning modern company.
Sales Operations	The role of Sales operations was also mentioned many times in the context of a functioning modern company.
System Administration	The concept of System Administration is tangentially broached by RevOps professionals, particularly in a world where the amount of technology tools available for teams has exploded to the degree that it has today. However, due to the broad scope of the subject, it has been left out of this study.

These topics then guided, (with the exclusion of software adoption and system administration, which we felt were too broad) the more traditional literature review and enabled us to have a firmer understanding of the topics surrounding RevOps in preparation for the interview process, namely drafting questions and setting up a narrative. The research performed is exploratory and inductive in nature and we hoped to discover to a greater degree, the practices and behaviors of RevOps operators. After performing the literature review, we believed that although there seemed to be constructs such as the Sales and Marketing Interface that describe in some manner how these departments interact, we believed there was still a degree of unknown in the practices that RevOps might be adopting in order to achieve closer organizational alignment between Sales, Marketing and Customer Success teams. We chose to utilize a semi-structured interview style, as it will allow us to obtain a flexible while structured way of collecting data for our analysis (Easterby-Smith, Mark, & Paul, 2008).

We expected the interviews would take 30 to 60 minutes depending on the availability of the candidates. The interviews were to be conducted by a single individual in the English language. Our goal was obviously to achieve theoretical saturation however, given the time constraints for the study we were unsure whether this would be achievable.

To develop our interview questions, we looked at our research questions and the codes highlighted as part of our MVL. At the start of our process, we believed the set of questions laid out below in Table 2, would help us address the research questions and get the answers we sought. For reference, the RQ are posted below:

**RQ 1:** How practitioners define RevOps and is there a unified model of RevOps across organizations?



**RQ 2:** How are RevOps principals being implemented by organizations, and more specifically, how are organizations ensuring greater cross functional integration?

**RQ 3:** What challenges do organizations face when implementing RevOps and how are firms measuring for a successful implementation of said practices?

**RQ 4:** Does RevOps represent a new construct and a departure from the concepts of Sales, Marketing and Customer Success Operations, particularly in the context of cross functional and inter organizational alignment or is it merely a marketing ploy, voted to rebrand a set of practices already consolidated in academia and in industry environments?

**RQ 5:** Are there measurable benefits from the adoption of RevOps and is RevOps relevant to all businesses?

Table 2

### Research Questions, Interview Questions and Rationales

RQs	Interview Question	Rationale
RQ1	<ol style="list-style-type: none"> <li>1. Describe your understanding of RevOps.</li> <li>2. How did you learn about RevOps and what are the main channels you utilize to further your knowledge in the area?</li> <li>3. Is RevOps a new job function or functional area within your organization?</li> <li>4. Who leads RevOps? Is there a formalized revenue leader such as a CRO or does RevOps report to either Sales, Marketing or Customer Success?</li> <li>5. Where does RevOps sit and report within your organization?</li> <li>6. what principles of RevOps are you implementing?</li> <li>7. What don't you understand of RevOps?</li> </ol>	<ol style="list-style-type: none"> <li>1. To see if there if there is uniformity in RevOps definitions across companies and helps understand the level of preparedness of the candidate on the subject matter</li> <li>2. To understand if RevOps narratives are being self-reinforced within the community by operators or if they are basing their knowledge on any pool of concepts outside of RevOps</li> <li>3. To understand RevOps structures in organizations</li> <li>4. To understand the makeup of RevOps teams in organizations</li> <li>5. To further understand the current makeup of RevOps teams in organizations</li> <li>6. To help us see if the candidate is actually implementing RevOps practices</li> <li>7. To understand if there are common knowledge gaps amongst practitioners</li> </ol>

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RQ2	<ul style="list-style-type: none"> <li>8. Can you share how many customers you had or how much revenue your company was producing when you decided to shift to RevOps?</li> <li>9. When is it a good time to hire a RevOps person?</li> <li>10. What does the ideal RevOps candidate look like?</li> <li>11. What is the first hire you do in RevOps? (what do you start with, sales, marketing or customer success Ops)</li> <li>12. Do you believe professionals can start their career in RevOps or is it something that one specializes in over time?</li> <li>13. What are the main skills and characteristics one should possess in order to be a successful RevOps professionals?</li> <li>14. How large should a RevOps org compared to the relative size of a company?</li> <li>15. How long did it take to implement RevOps in your organization?</li> <li>16. What practices has management done, if any to support the rollout of RevOps in your organization?</li> <li>17. What were some key aspects in the successful implementation of RevOps at your company?</li> <li>18. Can you pinpoint any practice that has changes since the implementation of RevOps?</li> <li>19. Have you identified any successful techniques to increase alignment within your organization?</li> <li>20. How are you measuring alignment?</li> </ul>	<p>and potentially create a research agenda for academics.</p> <ul style="list-style-type: none"> <li>8. To understand if you need a mature organization to implement and benefit from RevOps</li> <li>9. To understand what at which point Executives should hire RevOps</li> <li>10. To help executives hire the right person</li> <li>11. To give executives best practices around building RevOps teams</li> <li>12. To help operators understand how they can be a RevOps professional</li> <li>13. To help operators refine their RevOps skills</li> <li>14. To help executives build RevOps teams at the right rate</li> <li>15. To give executives a time horizon for the implementation of RevOps practices</li> <li>16. To understand whether organizations are making full use of academic knowledge around interdepartmental interfaces.</li> <li>17. To give executives and operations best practices.</li> <li>18. To understand if implementing RevOps has any real impact on the people</li> <li>19. To offer executives best practices for alignment that might not be covered in academia.</li> <li>20. To understand if there is actual alignment or only perceived alignment in the organization.</li> </ul>
RQ3	<ul style="list-style-type: none"> <li>21. Can you elaborate on the challenges in alignment between departments in your company?</li> <li>22. What challenges did you face as an individual and an organization when implementing RevOps?</li> </ul>	<ul style="list-style-type: none"> <li>21. To understand if the candidate's organization was actually trying to fix a problem.</li> <li>22. To surface any issues executives or operations may face when first implementing RevOps.</li> </ul>

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	23. Have you experienced resistance in the implementation of these practices? How did you overcome this?	23. To surface more issues that Executives or Operators might be facing.
	24. Is there a skills gap for workers trying to work in RevOps?	24. To help executives understand whether they should offer training when implementing RevOps.
	25. Do you believe management understand the importance of RevOps?	25. To understand whether there is buy in for RevOps internally.
	26. Does management have the skills required to lead the RevOps organization or is there a skills gap?	26. To understand whether there is need for a RevOps leader or if traditional management figures can oversee RevOps.
	27. Describe the process of transformation from your current process to RevOps	27. To understand how executives might implement RevOps in their orgs.
	28. How are you evaluating the effectiveness of RevOps?	28. To help executives measure the success of RevOps.
RQ4	29. How do you think of RevOps in the context of Sales, Marketing and Customer success Operations?	29. To help us understand if RevOps is seen as a substitution of these constructs or an evolution
	30. Are these functional areas retaining their responsibilities or have they changed since the implementation of RevOps?	30. To understand if this is only a rebranding of a department or if the nature of the work is changing.
	31. Are Sales, Marketing and Customer Success Ops rebranding themselves as Revenue Ops or are the separate functions being conserved?	31. To understand if RevOps exists as an “vague ethos” or a more consolidated set of practices.
	32. How long have you been in your RevOps Role and what was your experience before that?	32. To understand the if the path from Sales, Marketing & Customer Success to RevOps is a straight one or if one can come in without experience in these areas.
	33. How do the metrics being tracked change compared to traditional Sales, Marketing and Customer Success Operations?	33. To understand to what degree the RevOps role differs from Sales, Marketing & Customer Success.
	34. How do the revenue leaders define their mission in your organization and has this changed from when there was no RevOps?	34. To understand how the team sees itself under RevOps vs traditional functional breakouts.
	35. Have the roles of Sales, Marketing and Customer Success Ops changed in your company after your started implementing RevOps practices?	35. To further understand the variability in roles and skills between RevOps and Sales, Marketing & Customer Success.
RQ5	36. What prompted your company to implement RevOps?	36. To understand if the problems they were trying to fix aligned with the outcomes they are seeing.
	37. Has your organization experienced a measurable change since the	37. To understand the validity of RevOps as a set of practices.

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<p>implementation of your RevOps strategy?</p> <p>38. Do you consider the implementation of RevOps a success within your company?</p> <p>39. What kind of products and services does your company sell?</p> <p>40. When joining a new company, is there anything that would bring you pause in considering the implementation of RevOps practices?</p>	<p>38. To understand if one can even discern the difference of the presence of RevOps inside an organization</p> <p>39. To frame the type of company that utilizes RevOps.</p> <p>40. To understand whether RevOps might only work under certain conditions.</p>
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### 4.3 Data Analysis

The interviews were recorded using the Zoom software, transcribed verbatim using the Nvivo software and analyzed again using the Nvivo software. Due to the widespread Covid-19 pandemic that perturbed the United States, it was not be possible to conduct in person interviews and thus interviews were conducted remotely using the Zoom calling software. We utilized the embedded Zoom recorder to record the audio of the call. To accelerate the transcription of the audio, we utilized the audio transcription software package from Nvivo. To ensure the quality of the transcription, we also inspected the recording and transcription manually. Finally, we hoped the Nvivo software would accelerate our coding procedures substantially, allowing us to focus more time on gaining insight from the data rather than trying to analyze it mechanically speaking.

The data extracted from Nvivo was utilized for a close comparison to all of our research questions, and our intention was that the evidence gathered will substantiate into answers to our Research Questions. In terms of addressing bias throughout the research, I must disclose that being a RevOps professional myself, there is a certain level of bias within the research, particularly when it comes to advocating the validity of RevOps practices.

#### **4.4 Anticipated Outcomes**

The intended outcome of the study, as outlined is three-fold. First, we shall review each research question and utilize quotes or excerpts from the interview to answer the specific topics covered in the research questions. This serves to answer some of the more fundamental questions we have identified that need to be answered in order to bring some validity to the field. Second, we perform a thematic analysis, voted to, as explained in the introduction, consolidate the knowledge we explored into broader themes which can serve practitioners, executives and academics alike in the pursuit of furthering one's knowledge in the field of RevOps. Our hope is that by performing a thematic analysis we have uncovered the major themes that any neophyte in the space should explore if they are interested in the RevOps space.

Lastly, we were certain that given this study represents a first foray in the field of RevOps, it would not be possible to produce definitive answers around all the questions that surround the field of RevOps. In our outcome we focus on pressing on the issues that are not resolved by the study and will propose a further set of research questions that academics may want to pursue in order to further explore any RevOps constructs (if validated as a new area) or further bolster existing literature narratives around the concepts of Sales, Marketing and Customer Success interfaces.

## 5. Data Analysis + Discussion

### 5.1 Outreach & Interviews

As mentioned in the methodology chapter, the process for engaging candidates entailed cold outreach, in most cases without having a connection that could help secure the interview. Initially this proved very complicated. The first 40 days of outreach were characterized by no responses. After having created a shortlist of potential candidates, the approach was to begin engaging junior candidates. Our thinking was that senior executives would likely be more busy and thus more likely to spare a few minutes to discuss RevOps. The approach did not work at all and I was not able to engage anyone from my first wave of outreach. In my second wave I tried approaching more seasoned RevOps professionals. While a few responded to the first emails, they all dropped off as I tried to outline my research and explain how they could participate. In retrospect some of my messages were very long. I initially thought that providing more context would help engage them but likely it had the opposite effect and made it look like it would be a substantial amount of work to participate in the study. Also likely, is the fact that acting as a graduate student, and not as a PhD researcher, these requests were probably taken less seriously. So far I had refrained from leveraging personal relationships or engaging with thought leaders in the space, as I wanted to get a few interviews under my belt first. However, given the time constraint (3 months), I decided to leverage the few contacts I had and engage some of the top thought leaders in the space. I was finally able to make a few connections and started interviewing the first few candidates. The process adapted to a first exploratory call where we would discuss my research and understand whether they were a good fit for it. As more candidates were interviewed I was introduced to more willing candidates, thus utilizing the snowballing methodology to engage new candidates. This proved to be one of the more effective

ways of engaging with RevOps personnel. In addition, LinkedIn and relevant communities such as the Wizard of Ops proved to be a great resource for identifying new candidates.

To schedule calls I leveraged an automatic scheduling tool called Calendly, adding some practicality to the scheduling process. It must be noted that some costs were accrued as part of the research. Namely, Nvivo required a license purchase and in order to take advantage of their automatic transcription service that accelerated our coding capacity, there was an extra charge per every hour of transcribed material. If added to the cost of purchasing a LinkedIn premium subscription to support outreach efforts, the research quickly snowballed into the hundreds of dollars in cost. This created a hinderance to scaling the study given the endeavor was entirely self-funded.

## **5.2 The Interviews and adjustments to the script**

The questions developed as part of the thesis proposal were all aimed at providing as much granularity as possible around our research questions, however, as we began to run mock interviews it became abundantly clear that going through all those questions would have required multiple sessions for each candidate and this was not going to be feasible for most participants. We thus decided to shorten the amount of topics that were part of the script and focus on the questions, and by extension, the research questions, for which we believed the study would be most well equipped to provide valuable conclusions or insight. It should be noted that as a result of this, all questions relating to our second research question were cut out of the interview script and thus have not been addressed at all. While through this editing process some questions relating to RQ2 could have remained in the script, we felt that by including these it would have diluted our ability to investigate the other questions to the degree of depth required and thus it

made more sense to try and go deeper instead of going wider. As such, we were unable to address whether RevOps professionals were utilizing best practices around alignment that are broached by traditional academic literature. This question will undoubtedly be an area that should be explored in further research on RevOps.

The interviews were scheduled utilizing Zoom and they lasted an average of 38 minutes.

The interview script can be found in the appendices as Appendix A.

### 5.3 Interview Subjects

The subjects we interviewed, all had a bachelor's degree in a field related to business or marketing. While we did not ask participant age, we estimate that these lie between 25-40 across all participants, with previous career varying within various functions of go to market area, across Sales, Marketing or Revenue Operations. This was in line with our expectations. All candidates we interviewed worked for software or IT companies.

Table 3

<b>Interview Subject</b>	<b>Title</b>	<b>Company Industry</b>
Candidate 1	Director of Revenue Operations	IT/Software
Candidate 2	CEO	IT/Software
Candidate 3	Head of Global Revenue Operations	IT/Software

### 5.4 Themes & Codes

In this section we highlighted a few themes that transpired as part of the interviews. These are organized in main themes and when relevant, sub themes that surround the topic of Revenue Operations. Throughout the coding process we tried to tie themes back to our main objectives of the research: Aggregating knowledge about RevOps for operators, helping executives understand how RevOps can be leveraged and guiding academics into new areas to be explored. It should be noted that while the script walked candidates through many questions,



further analysis highlighted that not all responses produced relevant themes for the study. The codes are broken down in table 4 for greater clarity.

Table 4

### Interview Coding

Main Theme	Sub Theme
RevOps as a mentality and cultural shift	A. Partnership with the CRO
RevOps is Multifaceted	Three or Four Pillars of RevOps Finance Product Management Manufacturing Systems Thinking
RevOps as an optimizer of time and Revenue Generation	RevOps as a connector of Go To Market Functions
Challenges in adoption	Lack of Executive buy-in Lack of the proper organizational Structure Lack of clarity around the role
RevOps in a state of flux	
RevOps does not replace Sales, Marketing and Customer Success Operations	

#### 5.4.1 RevOps as a Mentality and Cultural Shift

Both candidate 1 and candidate 2 highlighted RevOps as either cultural shift or a mentality, rather than solely a framework. These remarks were not solicited as part of a question but came about in conversation when referring to the RevOps practice. Candidate 3 also highlighted how RevOps is not just a team or functional area but a shift to an operations mentality, focused on optimization.

##### 5.4.1.1 Partnership with the CRO

When asked about organizational structures and functional reporting, all candidates highlighted how, in an ideal setting the RevOps lead should report to the Chief Revenue Officer. Candidate 1 in particular highlighted that in a scenario where the CRO did not exist, RevOps should ideally report to whomever leads strategy.

### **5.4.2 RevOps is multifaceted**

As part of the line of questioning, we asked participants in the study about their understanding of RevOps and whether they thought RevOps was borrowing concepts from other disciplines. Candidate 2 highlighted influences from Finance and Product Management. In line with the grounded theory approach the interview script evolved over the course of the process so not all candidate were given the chance to express this view throughout the interview.

#### ***5.4.2.1 Three or Four Pillars***

Grey literature around RevOps speaks of four pillars of Revenue Operations, Process, Enablement, Systems and Insights. Not all candidates however highlighted the four pillars. For candidate 1, this was definitely a focus. Candidate 2 on the other hand, mentioned People, Process and Technology as the pillars that were valuable to RevOps. Candidate 3 on the other hand, mentioned alignment of RevOps around the pillars without being specific about what those pillars entailed.

#### ***5.4.2.2 Finance***

Candidate 2 specifically pointed to measurement practices being an area of overlap between Finance and RevOps. In finance decisions tend to relatively “agnostic”. By removing the bias of metrics driven by a specific functional area and focusing on tying to Revenue, similar to what finance would do, it helps maintain an agnostic view of the business.

#### ***5.4.2.3 Manufacturing***

Candidate 3 highlighted how RevOps borrows manufacturing concepts and tries to apply these to the revenue generation process. By dissecting the entire process of generating revenue through customer interactions, and trying to assess and deliver value at every interaction with the customer, RevOps is essentially adopting practices such as Value Stream mapping.

#### ***5.4.2.4 Product Management***

Candidate 2 spoke to the relevancy of Product Management as a way for RevOps professionals to build efficient technology stacks to support the revenue team. The candidate noted that this was specifically relevant in companies where there is heavy adoption of tools and thus, as requests come in from various groups it is important to always question the “why” of certain requests are being made or why a certain tool is needed. If necessary, the why should be addressed multiple times to get to the heart of the reasoning behind the request, in order to allow the RevOps professional to solve for the right problem.

#### ***5.4.2.4 System Thinking***

Candidate 3 illustrated the revenue team, composed on Sales, Marketing and Customer success as a living system, similar to one of a manufacturing floor, and as such, adopting a systems mentality can help the RevOps professional get the most out of the entire Revenue team.

### **5.4.3 RevOps as an Optimizer of Time and Revenue Generation**

All candidates were prompted with questions around the measurement of RevOps’s output. There seems to be consensus throughout all interviewed candidates as to how RevOps can be measured or evaluated. In their view, RevOps should be measured in Time savings. Candidate 1 and candidate 2, specifically referenced Deal Time savings, allowing revenue teams to close deals more rapidly. Candidate 2 specifically mentioned an anecdote with a customer of theirs adopting the RevOps principles and reducing their sales cycle by almost 15 days. More importantly, as time savings start to compound, these translate in increased revenue performance and efficiencies.

Candidate 3 highlighted their process of evaluating RevOps’s effectiveness through Value Stream Mapping. Specifically breaking down all processes separately and analyzing the time

spent on each activity and defining the “Current State”. Once this activity is completed, RevOps can proceed to make adjustments in process to accrue time savings.

#### ***5.4.3.1 RevOps as a the connector of Go to Market Operations***

When asked to share their understanding of RevOps we got overlapping answers from all candidates that cemented RevOps as a function that is focused on supporting the revenue and go-to-market functions specifically focused on helping them generate more revenue. Candidate 1 saw RevOps as directly responsible for helping the revenue teams generate more revenue. Candidate 2 described RevOps as the operational leader of revenue generating teams (Sales, Marketing, Customer Success). This view was shared by Candidate 3 who sees RevOps as the effort to unite go to market operations under one roof to deliver a seamless customer experience.

#### **5.4.4 Challenges in adoption**

Throughout the line of questioning, the interview candidates were asked about potential challenges that people might face when adopting RevOps. These break down into sub-themes, namely: lack of executive leadership buy-in, lack of the right organizational structure and lack of internal clarity around the role.

##### **5.4.4.1 Lack of Executive buy-in**

Candidate one explicitly noted that you need to have executive buy in for the revenue operations team to work. Candidate 2 also mentioned, that ultimately, everything starts at the top. When engaging Candidate 3 around the challenges in adoption, they mentioned that as the Introducer of RevOps in their company, they had to evangelize the practice extensively internally and still after the adoption, didn't feel that the role was fully understood and appreciated.

##### **5.4.4.2 Lack of the correct organizational structure**

Candidate 1 recalled from experience situations where the RevOps role had been created at the company, however the roles of Sales, Marketing and Customer Success Operations were siloed in their functional areas instead of reporting to RevOps. In this scenario, they described RevOps as largely ineffective in aligning the company and delivering efficiencies.

#### **5.4.4.3 Lack of clarity around the role**

Two candidates highlighted some confusion in the organization around the role of RevOps and their mandate. Candidate 1 described the challenge of defining the scope of RevOps in the context of non-sales related activity such as business development, where process is less strictly defined and more “loose”. In their mind, it was not always clear if the domain of RevOps extended to Business development or was limited to Sales Activities. Similarly, candidate 2 highlighted challenges in understanding ownership of certain processes. When an issue around a process or system was raised internally, it was sometimes unclear who the owner was, if this sat with RevOps or with another functional area.

#### **5.4.5 RevOps is in constant Flux**

While this theme could be viewed as a sub-theme of challenges in adoption of RevOps we wanted to highlight it as a standalone theme as we feel it encompasses much of what others in the field have highlighted around RevOps, and that is, how quickly RevOps is progressing. Candidate 2 highlighted how they thought the landscape was changing every single day while candidate 3 highlighted that the difficulty in understanding RevOps stems from it changing so quickly.

#### **5.4.6. RevOps does not replace Sales, Marketing and Customer Success Ops**

While all candidates agreed that this will vary from organization to organization, especially based on the maturity level of each company, the practice of RevOps, doesn't necessarily displace the functional areas it brings together. In fact, as candidate 3 pointed out, again depending on organizational maturity, these roles need to remain and should retain their defined scope. In other words, the work that these functions cover does not disappear and the need for roles remains. What changes, is where these roles report which forces them to refocus their priorities and take a more wholistic view of the revenue organization instead of being closed in their silos

## **6. Analysis and Discussion of Results**

Before diving into the analysis of the results, it is important to state the inherent challenge of deriving any definitive conclusions in a study that explores an area so broad and so nebulous as Revenue Operations. This difficulty became very apparent when trying to craft the optimal interview script, that kept the breadth of topics large enough to encompass all the topics relevant to RevOps as well as not thinning out the discussion excessively to the point where we were getting only short sentence responses to our questions. Engaging with qualified professionals proved to be incredibly onerous which further undermined our capability to achieve any meaningful theoretical saturation. This is especially true when keeping in mind that this study was on a strict timeline (3 months) and that the resources to undergo the study were very tight, as this was an entirely self-funded proposition, without financial support from Harrisburg University. Nonetheless, given this premise, we shall proceed to elaborate on our findings and attempt to consolidate the facts surrounding our research.

### **6.1 RevOps remains nebulous and complex**

If there is one thing that this study has confirmed is how complex and nebulous RevOps actually is. The data reveals there is some overlap in understanding across organizations as to what RevOps is about. Some see RevOps as “a support function that helps the revenue team generate more revenue”, others think “RevOps unites Go to Market Operations” to “RevOps is end to end operational support for Revenue generating teams”. There seems to be therefore some evidence that what grey literature tells us about the practice is indeed what practitioners feel their role is within organizations. Given these definitions, the role of RevOps as the “Integrator” as postulated earlier, during a parallel with the Sales and Marketing Interface model proposed by

Rouziès also seems to have some validity. With this in mind, RevOps should really be seen as an exercise of coordination that becomes necessary as revenue organizations grow in complexity. The most interesting development however, which was not highlighted as part of the MLVR, is that almost all candidates I interviewed agreed to the fact that RevOps is a mentality or culture, more than it is a function. Adopting RevOps should, in theory change the way we operate our revenue teams. This is done by becoming much more data driven and leveraging technologies to help teams address inefficiencies or gaps in their processes. The overlaps in understanding around RevOps are not surprising considering many of the candidates I interviewed mentioned some of the same sources that help them keep up to date with RevOps. In particular, the Funnelcake report outlined in section 2 seems to be the source of inspiration around RevOps for many in the space. When trying to understand more around the philosophy and the tenets of RevOps, the interviews uncovered some interesting angles not discussed in the available literature. Namely it seems that the RevOps discipline borrows aspects of finance, manufacturing and product management among other areas.

As highlighted in the previous section. In finance decisions tend to be almost entirely quantitative and thus relatively “agnostic”. A dollar is a dollar. Similarly, in an ideal RevOps environment, measurement of outcomes should be revenue driven. In Revenue teams, often metrics are defined by their functional owners. Marketing defines their success in terms of MQLs (Marketing Qualified Leads), SQLs (Sales Qualified Leads), or sales could assess their teams based on number of meetings or new deals. By attaching a revenue value to each of these metrics, RevOps is essentially trying to level the playing field and ensure all entities in the revenue organizations are speaking the same language, thus rendering decision making more



“agnostic” and removing some of the inevitable bias created by functional areas defining their own metrics as they please.

The product management view is also an interesting angle to view RevOps, although it must be noted that, as one candidate pointed out “this is more relevant to teams that heavily leverage technology” as part of their go to market strategy. Because so many tools are available, it is easy for RevOps professionals to fall into the trap of overleveraging software to engage the market. This can sometimes be at the detriment of the sales team’s experience or even worst, the customer’s. RevOps needs to strike a careful balance to “curate the experience” the customer is going through, while enabling the sales team efficiently. Similarly, there are so many directions the RevOps team could work on, they need to exercise judgement when receiving requests from sales or marketing leaders. Each request must be scoped out and understood, even by creating user stories, to properly define the intended outcome of the request. Leveraging frameworks such as “Jobs to be done”, popularized by Clayton Christensen’s research in the field of innovation (Clayton M. Christensen, 2016) can be a strong tool for RevOps professionals to improve their practice.

Furthermore, some indicated that “adopting a manufacturing approach” or even “systems thinking” to running revenue operations might help guide practitioners into deepening the utility that RevOps provides. For some, “revenue teams represent living systems, similar to a manufacturing floor”. It is RevOps’s role to ensure each cog in the machine is working at peak efficiency in order to maximize output of the system. It is no wonder that books such as “The Goal” by Eliyahu Goldratt or “The Phoenix Project” by Kim et. Al. (business novels focused on lean manufacturing principles for the former and lean/agile methodologies in software and IT development for the latter) are finding their ways on the bookshelves of RevOps professionals.

While these concepts introduced seem relevant to the RevOps framework, they were not shared by everyone we interviewed. Thus, while it seems superficially there is a shared understanding around the tenets of RevOps, the data suggests not all fully understand how far the RevOps practice can be pushed or how many directions it can take in order to bring its promise and value to fruition. This is to some degree expected given the nascent nature of the industry and considering many RevOps professionals have not been in their role for an extended amount of time. It should be noted that applying manufacturing or operational and supply chain principles to sales is not entirely novel (Tietje, 2008), however taking the same lens to look at revenue organizations as a whole, can be an interesting area of research for academics looking to expand the domain of Revenue Operations. Due to the small sample size, it is dangerous to extrapolate excessively whether these principles apply to every RevOps role, however, their relevance seems sound and this area should be covered more extensively through future research.

When looking at organizational structure, the data from the interview tells us that RevOps functions usually report to the CRO, and that Sales Ops, Marketing Ops & Customer Success Ops should report to RevOps. Although the data shows uniformity in models across organizations due to the small sample size it is hard to extrapolate whether this is actually representative of the entire industry. In fact, this is likely not the case as one candidate highlighted how one of the challenges in adopting RevOps can be the lack of the correct organizational structure. The candidate recalled an instance where each operational functional area was indeed siloed despite the fact that RevOps had been created as a functional area in the organization. Taking RevOps literature into account, and looking at the constructs surrounding the sales and marketing interface, it stands to reason that rolling up Sales, Marketing and Customer Success Ops under the RevOps would lead to optimal results. This is in line Rouziès's

theory that having a centralized reporting figure forces cross functional collaboration which as we have learned, leads to better outcomes for teams. However neither the grey literature available on RevOps nor the interviews conducted reveal academically proven empirical evidence that doing so leads to optimal results. In order to fully understand what optimal organizational structures look like across industry, researchers should continue to investigate the matter.

One critical element that should not be overlooked, that transpired as part of the interview process is the partnership aspect with the CRO. If we view the CRO as the owner of the vision for what a customer experience should be, then RevOps becomes the execution arm of this vision and this execution is manifested through the work of all the moving parts in a RevOps organization. The CRO communicates the vision to the revenue organization and the RevOps leader is responsible not only for ensuring everyone is aware of the vision and understands it, but also that everyone is playing their role at the right time and in the right way. This underlines how important it is that RevOps reports to the stakeholder that owns the customer experience, no matter where that person lies.

All things considered, RevOps remains a nebulous subject. One of the interesting findings however, is that RevOps is a “methodology” as much as it is a new role or job function. Implementing RevOps not only means implementing the role and structural re-organization but also the approach to the work. Our findings show that while there is certainly some overlap in understanding across candidates and organizations, this is not highly refined. This is not to say that each candidate did not understand Revenue Operations. On the contrary, each candidate brought to the table something of value that others didn’t and this underlines how many directions RevOps can and will take. When parting ways, one senior executive did mention

RevOps is evolving very quickly and thus, it is hard to predict what turn it is going to take, which I believe is a good summary of where the practice is today. It is so hard to define because it is changing very quickly and unfolding in multiple directions. This is clearly an area researchers should continue to explore.

## **6.2 It Makes sense to align on paper, although it can be a challenge**

One of the main propositions of RevOps is the promotion of Internal alignment to help increase departmental efficiency and output. While we were not able to explore alignment techniques for reasons stated in section 6.1, we have uncovered some common trends and difficulties companies might encounter when implementing RevOps in their organizations.

The exploration into this area highlighted issues around implementation such as the lack of executive buy-in, lack of the proper organizational structure, lack of clear internal definition and scope of the role, the lack of the correct organizational structure as well as poor definition of the scope and the role which led to internal confusion.

As outlined in section 3.2 when covering organizational alignment, conventional theory dictates that executive buy-in is paramount for the rollout of initiatives requiring alignment of intents. This is also true in practice, in the world of RevOps. All candidates we spoke to highlighted executive or leadership buy in as a key component for the successful deployment of RevOps. As some said, “RevOps is a mentality” and requires a “cultural shift”, where transparency and thus accountability is spread within the revenue organization and thus placing a degree pressure on the status quo. “Ultimately, it needs to start at the top” as one candidate said. One candidate recalled an instance where a process was in place for sellers to log or enter data in the CRM but it wasn’t followed. Since RevOps’s ability to optimize is intrinsically related to

data quality, the lack of clean and reliable datasets removes much of RevOps's ability to benefit the organization.

While it seems that the lack of leadership buy in as the main hinderance to RevOps flourishing and bringing value into the company, it is also true that the change needs to be “structural” as well as “mental”. In other words the shift needs to occur not only in culture but also in terms of organizational design. As mentioned earlier, it sometimes happens that companies hire RevOps but functional areas of Sales Marketing and Customer Success Ops remain siloed. This means, priorities and accountability remain driven from functional leaders which by definition have a narrower view of the revenue organization than a RevOps operator might have. One candidate noted: “without a direct line of reporting to RevOps, teams will remain siloed and divergent incentives will cause misalignment of intents”. Again, this is in line with Rouziès thinking on how to best align. Following this logic, it there is some evidence to believe that if the objective of implementing RevOps is to align teams, applying the correct organizational structure should be part of the implementation process.

Lastly, when looking at challenges in RevOps adoption, candidates highlighted how the scope of the role was not always clear within companies and this created confusion internally, specifically around ownership of an area or system. The fact that other parties in the organization have little clarity around the role is not surprising, given the nascent nature of the role but most importantly given that fact that we don't get the same responses from all candidates when prompted to elaborate on their understanding of the RevOps practice and where it borrowed from. At this time there is no textbook definition of RevOps and its scope and it is unlikely we will get one anytime soon given the pace at which the practice keeps evolving. Nonetheless, a

thorough evaluation of the scope of RevOps within organizations can be an interesting area of research for those wishing to expand the constructs surrounding the space.

### **6.3 RevOps Measurement**

As with any initiative, effectiveness cannot be properly determined without the correct measurement instrument. Operational and support roles are traditionally an efficiency play, and RevOps in this department, fares no differently. The grey literature available on RevOps highlights how implementing the practices leads to faster and more efficient revenue growth and to a degree, the interviews seem to confirm that. Multiple candidates brought the example of reducing deal cycle length as a successful way to measure the impact of some RevOps initiatives. While the interviews did not allow a thorough investigation of KPIs within organizations, one can extrapolate the following: If time saving are indeed the benefit that RevOps brings to the table, RevOps professionals and those who evaluate them, should be focused on measuring the time it takes for the many processes in the revenue organization to take place. The candidates brought forward deal cycle, which is a fairly all-encompassing metric to assess efficiency in the sales process. However this can be broken down by looking at lead response time, time for a lead to become an MQL (Marketing Qualified Lead), time for an MQL to become an SQL (Sales Qualified Lead) and furthermore, the time it takes for an SQL to become a customer. These types of metrics hold true not only for the sales process but also for onboarding of new personnel, for example. One might want to measure how long does it take for a new team member to sign the first customer. Or even, if the focus is on creating efficiencies, after how long do you start seeing diminishing returns on deal follow-ups for your sellers. In practice, any analysis or measurement that can decrease wastefulness and ensure the team is operating at optimal speed is worth the time of a RevOps professional. While listing every possible metric that can be tracked will not be

efficient, one useful lens that RevOps practitioners can apply is a systems one. If one is able to assess the model in numerical terms, the system as a whole, one will be able to identify inefficiencies and areas yearning for optimization. This approach will ensure RevOps initiatives are focused on addressing specific issues aimed at optimizing the system as a whole rather than a small subsystems with little impact on the macro scale. Through the study we have been able to determine that time savings for processes are indeed some of the key metrics RevOps should be tracking. However further research in the area is needed to allow for an exhaustive analysis of the most relevant metrics to be monitored. In particular, Operations Research might present applicable findings for those keen to explore this particular area of RevOps.

#### **6.4 RevOps as a novel construct**

Whether RevOps represents a new construct was probably the most complicated question to tackle in the research. The initial MVLRL which explored RevOps grey literature, Sales, Marketing and Customer Success Operations and furthermore alignment and the Sales and Marketing Interface seemed to suggest that while novel as a concept in industry circles, there seemed to be much overlap with this last theory introduced by Rouziès. The Sales and Marketing Interface attempts to provide a best practices model to guide professionals in the optimal way to connect the practices of Sales and Marketing in order to promote alignment and efficiency. RevOps seems to be doing exactly that while extending the scope to Customer Success as well as Sales and Marketing. This considered, part of RevOps looks like an extension of the Sales and Marketing Interface or as Sales Hacker highlighted “Sales and Marketing Alignment 2.0” (Sales Hacker, 2018).

What however was not clear from the initial MVLR was how much RevOps borrowed from other disciplines in order to achieve its goals. Candidates from the interview mentioned Product Management and Manufacturing as areas that influenced RevOps. If we apply those lenses to RevOps then, one starts to see that the RevOps methodology could also be an attempt to introduce lean manufacturing and other industrial engineering principles into an area of the organization which historically was lagging behind in this regard. In a way, this is similar to what has occurred in the software engineering and IT space over the last decade with DevOps becoming a mainstay at most software companies around the world.

Candidates in the study stressed the fact that RevOps did not replace the functions of Sales, Marketing and Customer Success Operations, pointing out that the work required would not disappear. The problems these solve still need to be solved. Thus RevOps should not really be seen as an evolution of these constructs but rather a refocusing of them. In other words, RevOps does not fundamentally change the work that is done. It does however change how the work is done. By Introducing Systems Thinking, by looking at the revenue organization as a whole and granting RevOps broad scope across departments, RevOps should be able to optimize for system wide output, rather than allowing each silo to steer in relatively different directions.

Again, as with all qualitative studies, it is hard to draw definitive conclusions, however, the data available does seem to point to the fact that RevOps does not in fact represent a completely new construct but rather it borrows from pre-existing constructs and methods to redefine what the optimal way of working should be within revenue organizations given the constraints that each of these live within. In order to definitively understand the validity of RevOps as a novel construct, researchers should try to focus on the parallels the RevOps



methodology shares with areas of Operations Research, Industrial Engineering, Lean Manufacturing as well as other areas of the Sales and Marketing Interface.

As we wrap up the discussion of results it should be highlighted that the interviews did highlight other concepts outside of what was presented, however these were only partially explored and it did not feel relevant to surface them as part of the analysis. Doing so with issues explored with little depth would have not led to any substantive discussion.

## **7. Conclusion**

To conclude this first foray in the area known as RevOps we will attempt to summarize many of the concepts outlined in the previous sections, while trying to answer some of the most relevant questions relative to the space. Our conclusion will also underline some of the limitations of the study, as well as framing the results of the research in light of the initial objectives. Finally, we proceed to provide a research agenda for researchers keen to explore RevOps in more depth.

### **7.1 Summary of findings**

This study has explored the concept of RevOps by observing grey literature on the matter as well as exploring academic research on the concepts of alignment which seems to be central to the RevOps narrative. We have seen how the practice has emerged in response to shifting market conditions. As consumer expectations and buying behavior has changed online, the way in which revenue organizations manage these relationships has also changed. Tracking and managing interactions with customers through technology has expanded the potential of revenue teams but at the same time, the proliferation of tools and data has increase the complexity in managing that

process. These days, Sales, Marketing and Customer Success need to manipulate large datasets a plethora of tools meaning Sales, Marketing and Customer Success teams need to specialize and learn new techniques. With so much specialization in their area, there is a natural tendency to drift apart. Studies have shown that as Information System complexity increases, collaboration across functions decreases. (Rouziès, et al., 2005). We have also learned, that as collaboration decreases, so does productivity. Research show that companies gain competitive advantage and financial performance by working in a more integrated way (Madhani, 2016), (Biemans, Brenčič, & Malshe, 2009), thus without proper alignment revenue organizations can be negatively affected. Given the above, it would seem that RevOps' premise focusing on alignment and centralization of revenue support functions under one function (Savic, 2017) has some validity. Recapping, as complexity of the system increases, so does entropy. Teams can become siloed and productivity and output can decrease. In such a situation, you may want to appoint an integrator (Rouziès, Anderson, Ajay K. Kohli, Weitz, & Zoltners, Sales and Marketing Integration - A Proposed Framework, 2005) to foster cross functional collaboration and hopefully boost system wide output. RevOps is that integrator. The logic is sound and it seems some of the grey literature available has some basis to make the claims that RevOps can increase a revenue organization's performance.

Given this understanding we attempted to explore how RevOps professionals understood the theory, how it was being put to work and what difficulties they were encountering. While the sample size remains too small to make definitive determinations around all RevOps professionals, we have found that on a surface level, RevOps professionals have an understanding of how to implement RevOps in their organizations. While their definitions are not refined there is a broad understanding of the mandate of RevOps, aimed to increase

productivity of their respective teams through efficiency and time savings. It did however appear that all participants were encountering some difficulties in applying the RevOps methodology. Some lamented issues around executive buy-in or even the lack of the optimal organizational structure that allows RevOps to operate the way it should. Furthermore, other highlighted how the lack of clarity around the scope of RevOps created some confusion across other teams. These issues are somewhat expected given RevOps is relatively novel. Academics warn us that without executive support initiatives aimed at creating cultural and structural alignment will fail (Meunier-FitzHugh & Laneb, 2009) (Madhani, 2016). After all as candidates noted, the shift needs to be mental and cultural as much as it needs to be structural. Thus to conclude, RevOps as a methodology and role may have a place within organizations that can lead to increased productivity, as long as it is accompanied by the correct organizational structure and managerial support.

Our study also tried to understand the relationship between RevOps and the functional areas it should lead: Sales, Marketing and Customer Success Operations. What became abundantly clear about RevOps is that it does not displace the practices of Sales Ops, Marketing Ops and CS Ops, rather it helps refocus them. It should be noted that the way these roles break out is going to vary from organization to organization, based on different maturity levels, however, In the context of a relatively mature organization where these functions all exist individually, RevOps can ensure that a revenue team's tools, systems and data are all aligned and pointing in the same direction. By introducing a vision that goes beyond the silo of each functional area, it can help ensure the team's mission as a whole is taken into consideration every step of the way, avoiding the dangers of Sales Ops optimizing in one direction and Marketing Ops going in another. The concept of viewing the revenue organization as a whole is surfaced in

grey literature on RevOps but not fully explored. Our conversations with Candidates highlighted how practitioners could be utilizing manufacturing, industrial engineering and system thinking principles to help guide their missions. In our discussion chapter we discussed how the introduction of these concepts in revenue organizations isn't too dissimilar from the DevOps movement and how software development and IT Operations started adopting lean manufacturing constructs. Taking these considerations into account and given many candidates highlighted that RevOps represented a cultural and mentality shift, more than just a functional role, we agree that RevOps can be seen as a methodology as much as it is a new role.

Through the study we were unable to determine whether RevOps represents an entirely new construct or whether practitioners in the space were indeed deploying novel techniques worth of mention. First indications point to the fact that RevOps may be borrowing principles and practices from different areas of research as the ones highlighted above and repurposing them. However in order to draw definitive conclusions, further research on the matter is required.

Our research also highlighted how quickly the RevOps practice continues to evolve, bringing validity to the notion of RevOps being complicated to define. This underscores how essential it will be for further research to be performed in the area.

The next section will try to address some of the limitations of the study that need to be taken into account as part of one's evaluation of our findings and research.

## **7.2 Limitations of the study**

In its present iteration, the study presents an extensive interdisciplinary point of view that presents an outline of how the RevOps profession might have come to be, what the key tenets of the discipline entail and tangentially whether organizations can benefit from applying the

RevOps methodology. However, despite this, the study still presents numerous limitations. These will be listed below.

### **7.2.1 Number of Interview Candidates**

The number of interview subjects that we were able to access was undoubtable the most glaring issue of this research. While it is true that qualitative studies are not aimed at reaching definitive conclusions, it is also true that the conclusions reached as part of the interviews in the field are extrapolated from an extremely small sample size and thus one must assume that theoretical saturation was not reached.

### **7.2.2 Time**

While as a student of Harrisburg University of Science and Technology I am able to conduct this thesis over the course of two semesters, I was also employed in full time work as part of my CPT and thus I feel the lack of time to dedicate my full resources to the study have definitely had an impact on a few areas. Firstly, the concept of Sales, Marketing and Customer Success interface is one that I was only able to surface late in the time allocated for my literary review. For this reason, it is possible that the literature on general interdepartmental interface may have been broader than explored during this study. As a result of such situation, one should not regard this study as the ultimate word on interdepartmental interfaces.

Another area impacted by the lack of time is the number of interviews I was able to perform as part of this study. Successful engagement of senior executives and RevOps professionals was an iterative process of trial and error and only later in my final semester was I able to conduct the first candidate interview.

### **7.2.3 Access to quality Interview Subjects**

As mentioned in previous sections, as part of the study we have decided to utilize an Exemplary methodology to select interview candidates. While we are sure this methodology yielded high quality results, connecting with professionals willing to share their ideas around the space was a challenge. Given the practice is so new, there is already a dearth of candidates available. Once we removed those unwilling to share their time and participating in the study, the pool of available candidates is greatly reduced. More time to perform the research could have curbed this limitation.

### **7.2.4 Generalizability**

As explained in previous sections, part of the study wants to highlight best practices around the Sales, Marketing & Customer Success Interface. While we believe there will be some applicability to other forms of interdepartmental interface, we also believe that due to the highlight specific nature of the subjects being tackled, the study achieves a low level generalizability.

### **7.2.5 Self-Referential Knowledge pools**

Our research found that candidates referenced some of the material that was analyzed as part of the our grey literature review on RevOps. While it is useful to see that professionals are utilizing some of the same sources to guide their practice, those sources are not backed by empirical evidence from academic studies and thus if the claims made by the grey literature were found to be false, this research and much of industry know how could be based on ill informed sources.

### **7.2.6 Cost to Conduct Research**

As outlined previously, this research was not funded by institutions or corporations. This means the cost of software tools utilized for the research was borne by myself. If the research had had a budget, I would have been able to find other solutions to best engage candidates such as purchasing lists of contacts from specialized companies. Furthermore, the cost of transcription and coding through Nvivo proved to be substantial and interviewing more candidates would have meant impacting my personal finances further.

### **7.2.7 Covid-19 Pandemic**

While the interviews could be conducted online without many issues, the fact that the Covid-19 pandemic restricted face to face interactions, diminished the chances of engaging RevOps professionals outside of my personal circles. For example, attending RevOps related meetups and conferences could have greatly increased my chances of adding candidates to the study.

## **7.3 Addressing Bias**

As presented during the Data Analysis section, I am a RevOps professional myself, which does present a certain conflict of interest. One might say that I could be personally invested in validating the RevOps practice. While I tried to be as objective as possible, I accept that the study may not be completely absent of bias.

## **7.4 Research Agenda and areas for further investigation**

As a first venture in the world of RevOps we believe this research has been able bring some clarity to the practice. It is however undeniable that many questions surrounding the methodology remain unanswered. We have highlighted in the table below, the most relevant

research questions we believe should be investigated in order for organizations and practitioners to gain a better understanding of how RevOps can be applied in the real world.

Table 5

### Research Agenda and Rationale

Research Question	Rationale
1. What manufacturing and industrial engineering principles are applicable to the RevOps methodology, if any?	1. The application of these principles to RevOps could greatly expand the utility the methodology provides to revenue organizations
2. When adopting RevOps, which organizational design leads to the highest revenue impact?	2. Finding the ideal organizational structure will be key for the model to be successfully deployed across businesses.
3. Are RevOps professionals utilizing best practices around alignment & cross functional collaboration?	3. Answers to this question could guide practitioners into selecting the correct methodologies to drive alignment and cross functional integration
4. Is RevOps proposing new ways for teams to interact outside of what the available literature tells us on alignment?	4. This question could solidify RevOps as a novel construct or expand our current understanding of the sales and marketing and customer success interface.
5. Is RevOps applicable to any company or business?	5. Our research was not able to address this question and we learn more about the validity of RevOps as a model to follow, it underscores its importance as an area of research.

## 7.5 Research Intent

While it is true that many questions surrounding RevOps remain unanswered and this research was not able to address all the questions it set out for itself, we believe the stakeholder groups mentioned in earlier sections would benefit from reading this research. In our introduction we highlighted how RevOps could be viewed from three different perspectives: Operators, Executives and Academics.



Even though the study does not present definitive conclusions on frameworks and this research should not be regarded as the final word of Sales, Marketing and Customer Success Operations, **Operators** looking to enter the space could benefit from the aggregation of concepts that this paper provides. We believe this paper provides a good picture of what the RevOps practice entails and what kind of skills and required of those working in the space.

Similarly, we believe **Executives** would also benefit from the research. Again, while we are unable to draw definitive conclusions in many areas, there are early signs showing that indeed RevOps may be able to address issues of misalignment in modern revenue organizations. Furthermore, we have provided a few examples of difficulties teams might encounter when deploying the practice. The study, also underscores what are some of the ways one might evaluate the work performed by RevOps and how it may be measured. Lastly it is our belief that having a background understanding of why RevOps emerged and how it can address misalignment issues might help executives understand whether RevOps is even relevant to their business before diving into new trends and adopting systems that aren't widely known or understood.

To conclude, we also believe that **Academics** could be well served by reading this paper, if they are interested in pursuing further research in the problem space. As we have amply stated, this qualitative study hasn't determined definitive conclusions but it has been able to somewhat contextualize RevOps in the practice of cross functional integration and interdepartmental alignment for Sales, Marketing and Customer Success teams. Furthermore, it is our hope that by providing a research agenda and sharing our methodology for conducting research, future investigators will be able to expand the knowledge of the problems space and generate new constructs and theory wherever applicable.

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## Appendices

### Appendix A – Interview Script

1. Can you share for the record, a little of your background?
2. In just a few sentences, if you can describe your understanding of RevOps.
  - a. How did you learn about RevOps and how do you further your knowledge in the space? Does RevOps borrow from any other practices?
  - b. Where do you think RevOps stems from. How did we get here? Does the rise of the CRO as a role have anything to do with it?
3. Is RevOps its own thing or is it just a rebrand of Sales Ops/Mkt Ops/CS Ops?
  - a. How do you see Sales Ops/Mktg Ops, and CS ops changing. Do they get folded in? how do they coalesce?
4. Is RevOps a job function at your company, Yes or No?
  - a. Were you part of that decision? do you know why the company went that route? Is there something you were trying to solve for?
    - i. Do you think RevOps is a good fit for your company? /why?



- ii. Does RevOps lend itself to any type of company? Why would a company not do RevOps?
    - iii. There is so much talk about increasing alignment. What do you do to increase alignment?
  - b. Where does RevOps report at your company?
  - c. When is it a good time to adopt RevOps in your mind? Is there such thing as too soon?
  - d. What do you do to measure the effectiveness of RevOps?
  - e. What is a must for the successful implementation of RevOps? Is there something that can derail the implementation?
  - f. Do you consider the implementation of RevOps at your company a success?
- 5. As more and more companies implement RevOps, do you see any resistance in adoption? Where are companies going to struggle with?
- 6. What are the traits you look out for when hiring for RevOps?
  - a. Is it easy to find people who understand what RevOps is all about?
  - b. Can someone start their career in RevOps?
  - c. What recommendations would you give a recent graduate who just joined the job market and wants a career in RevOps?
- 7. If you had to sum things in 1 sentence, what is the ultimate goal of RevOps?
- 8. What are 1-2 things about RevOps that you don't understand or would like to learn?