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GROUP

# Establishing Your Revenue Operations Charter

Revenue Operations (RevOps) lives at the intersection of Sales, Marketing, and Customer Success. It is responsible for creating a customer-centric and holistic approach for acquiring and retaining customers.

The question is: How do you translate that into an actionable plan for **your** organization?

You start by establishing common principles, or a charter, to inform every strategic decision you make going forward.

## For RevOps, that involves the following principles:

- To take a holistic and single-threaded approach to optimize technology, process and data across the entire customer life cycle to drive revenue and growth
- To visualize the customer life cycle through systems and data, thereby ensuring every department can respond appropriately to optimize the customer experience
- To attract more new customers and retain the ones we have by making sure we have the tools, optimized processes and data
- With digital transformation as the foundation, to build a unified operational capability that improves revenue performance through one line of sight to the customer

Your charter must involve sales, marketing, sales development reps, a customer success team, product development and any part of the organization needing customer data to make decisions. These groups comprise the backbone and the brain of your revenue operations function, and they're laser-focused on providing data and insights about every aspect of the customer journey to a wider audience.

That visibility is the difference maker that changes the way you do business, enabling you to sense and respond to changes in your customer's satisfaction, perspective and preferences in real time across every key part of your organization.

## Five Key Operational Steps

Like many innovations in business, most organizations that have a combined operations team are small and agile. Realizing that it's not the easiest thing in the world to break down well-established silos, what are a few things you can do to get started, given that you buy into the concept? If you want to position your organization to compete in today's customer-driven world by building a combined RevOps team, follow these five steps:

1. Make sure the customer-centric strategy is really important to your company by asking, "Where is the evidence?" In other words, look for concrete examples of a customer-centric mindset in action in your organization, then build from those. This is how you fuel a genuine passion for customer focus from all parts of your company.
2. Advocate for organizational change – especially when times are good! We all know many significant business changes are reactionary moves made to poor market conditions or results. This kind of change, however, works best when things are working well and you can challenge the organization to go to the next level.
3. Select a strong leader to run the combined function. The person must have credibility with both sales and marketing, and great communication and collaboration skills.

4. Align your technology stack around the customer journey. Be intentional. Describe every stage of the customer journey around the key milestones. Assign roles, responsibilities, outcomes and the associated technology to support every desired outcome.
5. Share key data and customer insights with all parts of the organization. By doing this, everyone can do their job better and improve alignment and responsiveness to the customer.

Use this charter to sketch the vision for what it looks like to move away from siloed organizations into a strategically-aligned revenue-generating function. Organizational silos and traditional team structures will struggle with responsiveness, inefficiencies, change, data, insights, politics and power—all at the expense of the customer and gaining competitive advantage for the company. The way forward is building a customer-centric and fully-aligned RevOps team fueled by insights from data and internal visibility.

The Pedowitz Group is here to help you take those first steps.

***Connect with one of our strategic RevOps consultants today***



## About The Pedowitz Group (TPG)

As a leading authority on Revenue Operations, MarTech, Demand Generation and Digital Transformation, The Pedowitz Group (TPG) has helped over 1,500 businesses transform their revenue engine into an efficient Revenue Operating System since 2007.

We help sales and marketing leaders modernize their approach to the digital customer experience that yield dramatic results in revenue growth.

**Want to learn more? Let's talk today.**

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