

THE REVENUE OPERATIONS BENCHMARK ASSESSMENT

The Revenue Operations Benchmark “ROB”™ assessment is a comprehensive and objective evaluation of 46 commercial capabilities, assets and competencies that drive sustainable revenue growth. Taking ROB enables Rev Ops & Growth leaders to identify their 3-5 most impactful drivers and develop holistic, unified cross-functional plans to drive implementation. ROB™ is unique because it focuses on the underlying drivers of a company’s potential to grow across all the operational value levers proven to impact future revenues, cash flow, and firm value - not just those in sales, marketing and service operations. ROB™ benchmarks an organization’s commercial capabilities, assets, and competencies across the forty-six drivers that span the functional and operational drivers of growth. These drivers include the critical ability to align operations and teams along the revenue cycle, utilize and monetize customer data, optimize core processes, and generate returns on growth investments and assets. The resulting ROB™ scorecard provides leaders, operators, and investors with a fact-based assessment of where they have the greatest operational value creation opportunities plus arm them with ‘best practice’ implementation roadmaps’ to enable step-by-step implementation leveraging best practices.

OPERATIONAL LEVARS OF FIRM VALUE

BRAND EQUITY	CUSTOMER EQUITY	PERCEPTIONS OF PRODUCT QUALITY AND INNOVATION	RETURN ON DIGITAL CHANNEL ASSETS
RETURN ON CUSTOMER DATA ASSETS	RETURN ON COMMERCIAL TECHNOLOGY ASSETS	RETURN ON GROWTH INVESTMENTS	COMMERCIAL ARCHITECTURE OPTIMIZATION
ORGANIZATIONAL KNOWLEDGE SHARING	TALENT ACQUISITION AND DEVELOPMENT	CUSTOMER LIFECYCLE MANAGEMENT	OPERATIONAL ALIGNMENT
ORGANIZATIONAL ALIGNMENT	PRICING STRUCTURE AND GOVERNANCE	GROWTH CULTURE	COMMERCIAL CONSISTENCY AND RELIABILITY

INTANGIBLE ASSET
 INTERDISCIPLINARY COMPETENCY
 FOUNDATIONAL CAPABILITY

PROBLEMS ROB™ SOLVES: The ROB™ assessment helps CEO’s, growth leaders, investors and boards maximize the revenue potential of their businesses by proactively addressing the top obstacles, capability gaps, and execution risks associated with Revenue Operations. Our proprietary and comprehensive analysis will help you:

- Build a consensus on the business case and remit for ‘Revenue Operations’
- Establish a financial basis for prioritizing hundreds possible growth initiatives to focus on the 3-5 that matter most
- Identify the root cause issues behind inconsistent revenue growth, revenue leakage, and high selling costs
- Develop a holistic plan to drive value creation that spans the people, process and technology aspects of growth
- Unify stakeholders around a common plan, financial model, and ‘vocabulary’ for Revenue Operations
- Empower CROs and RevOps leaders to get the cooperation, budgets and behavior change needed to succeed
- Provide benchmarks and KPIs to manage growth resources based on customer and company value creation
- Agree on a financially valid basis for optimally allocating commercial resources, effort, and program budgets
- Make intelligent long term investments in the channels, systems, and data infrastructure that create scale
- Set realistic expectations about the time, change management, capability building and investment involved.
- Improve the ownership, accountability, and performance of the commercial assets, processes and resources.

HOW THE REVENUE OPERATIONS BENCHMARK WORKS: A ROB™ assessment is a five step process for defining, developing, and executing a best in class revenue operations strategy. Over the course of three to four weeks, our expert team will execute a comprehensive evaluation of your commercial operations with a minimum of management time, bandwidth and resources at your company.

Step One: Define the key strategic and business objectives to reflect your unique growth model: Identify your ‘North Star’ for revenue operations.

Step Two: Benchmark your commercial capabilities, practices, and performance across the 46 growth drivers proven to be causal of future revenues, cash flow and value creation in the context of the key strategic & business objectives. Deliver your Revenue Operations Benchmark Scorecard.

Step Three: Quantify, debate, and agree upon the untapped revenue growth potential in your business and prioritize the key opportunities to focus on the top 3-5 highest ROI opportunities that are most feasible to implement.

Step Four: Develop a comprehensive and user friendly Implementation Roadmaps with the right KPI’s to support execution and provide a financially valid basis for allocating resources and measuring progress.

Step Five: Use the Benchmark Scorecard, Recommendations, and Implementation Roadmaps to inform, unify and manage all key stakeholders in a process of continuous improvement that ensures collaboration and accountability.

COMPANY INVOLVEMENT & REQUIREMENTS: The company needs to assign a project sponsor to help manage the assessment, provide input on the 3-5 recommended focus areas, and facilitate internal communications. *The time commitment for the project sponsor is only 1-2 hours per week.* The ROB™ assessment involves two sources of data inputs:

Source One: Documents and plans provided by the company (if available):

- | | |
|---|--|
| <input type="checkbox"/> Strategic plan | <input type="checkbox"/> Marketing & sales funnel metrics |
| <input type="checkbox"/> Vision / mission / value statement | <input type="checkbox"/> Historical revenues vs. goals |
| <input type="checkbox"/> Sales/GTM plan | <input type="checkbox"/> Budget summary |
| <input type="checkbox"/> Sales methodology | <input type="checkbox"/> Revenue forecast model |
| <input type="checkbox"/> KPI dashboard | <input type="checkbox"/> Pricing guidelines |
| <input type="checkbox"/> Management goals | <input type="checkbox"/> Product platform access & demo |
| <input type="checkbox"/> Marketing plan | <input type="checkbox"/> Product mgt / product dev process |

Source Two: Confidential input from key growth executives, key stakeholders, and select revenue team members. A broad cross section of stakeholder input can be captured in individualized self-assessment surveys that can be completed online in 15-20 minutes. This fact base will be supplemented by in depth interviews with selected members of the team which can take 30-45 minutes. The assessments and interviews will be focused on the 46 drivers of growth identified in our proprietary model – and will include discussions of:

- | | | |
|---|---|--|
| <input type="checkbox"/> Core competencies / right to win | <input type="checkbox"/> Sales management | <input type="checkbox"/> Data & data integrity |
| <input type="checkbox"/> Strategy & vision | <input type="checkbox"/> Brand & marketing | <input type="checkbox"/> Pricing |
| <input type="checkbox"/> Culture & governance | <input type="checkbox"/> Customer centricity | <input type="checkbox"/> Technology & operations |
| <input type="checkbox"/> Competition & market landscape | <input type="checkbox"/> Product & product management | <input type="checkbox"/> Goals & role clarity |
| <input type="checkbox"/> Revenue growth potential | <input type="checkbox"/> Customer centricity | <input type="checkbox"/> Execution |
| <input type="checkbox"/> Sales process | <input type="checkbox"/> CRM / customer analytics | <input type="checkbox"/> ‘Magic wand’ |

DELIVERABLES: Within three to four weeks, your team will receive all deliverables and begin initial implementation. Deliverables of the ROB™ assessment include:

- Complete commercial benchmark assessment report and ROB™ Scorecard
- A briefing to project sponsor and key project leaders on gaps, opportunities, risks and potential actions
- A Value Creation Opportunity Report with prioritized recommendations
- Implementation Roadmaps for each priority recommendation and workshop(s) as needed