

THE REVENUE OPERATIONS BENCHMARK ASSESSMENT

The Revenue Operations Benchmark (ROB™) assessment is a comprehensive, empirical, and forward-looking evaluation of the ability of a business to generate consistent and scalable growth. ROB™ is unique because it focuses on the underlying drivers of a company's potential to grow across the sixteen operational value levers proven to impact future revenues, cash flow, and firm value. ROB™ benchmarks a company's commercial capabilities, assets, and competencies across forty-six growth 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, share and monetize information, and generate returns on growth investments and assets. The resulting ROB™ scorecard provides C-Suite leaders, operators, boards and investors a fact-based assessment of the probability of hitting future revenue targets and identifies the root cause issues holding back growth. In addition to scores, ROB™ quantifies the latent growth potential in the business and recommends specific growth drivers & action steps that have the greatest potential to unlock that revenue, improve performance, and realize the full growth potential from commercial assets.

OPERATIONAL LEVARS OF FIRM VALUE



PROBLEMS ROB™ SOLVES: The ROB™ assessment helps growth leaders, boards, and CEOs to 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 to:

- Build a consensus on the business case and remit for 'Revenue Operations' in their unique business
- 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 KPI's to manage growth resources based on customer and firm 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 of your unique growth model: your ‘North Star’ for revenue operations and the key stakeholders across revenue functions who are essential to success.

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

Step Three: Quantify, debate, and agree upon the untapped revenue growth potential in your business and prioritize the key opportunities to focus on based on the financial impact, value created, and your company’s ability to execute

Step Four: Develop a comprehensive and ‘implementation friendly’ playbooks with the right KPI’s to support execution. These playbooks provide a financially valid basis for allocating resources and measuring progress.

Step Five: Use the revenue operations benchmarks, financial analysis and execution playbook to inform, unify and manage all key stakeholders in collaborative workshops and executive education sessions.

COMPANY INVOLVEMENT & REQUIREMENTS: The company needs to assign a project sponsor to help manage the assessment, development of the revenue operations plan, and workshops. ***The time commitment for the project sponsor is only about 1 hour 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: Your team will receive the commercial benchmark scorecard, a value creation opportunity assessment, and an execution playbook can typically be completed in 3-4 weeks. Deliverables of the ROB™ assessment include:

- Complete commercial benchmark scorecard 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, KPI’s with clear action steps
- Implementation workshop(s) to educate, agree and communicate the learnings and actions from the analysis