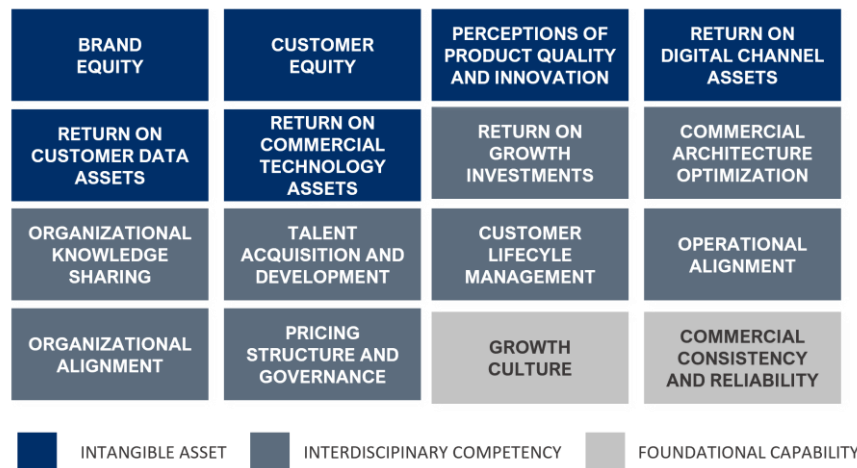


THE QUALITY OF REVENUE OPERATIONS BENCHMARK ANALYSIS

A Quality of Revenue Operations (QORO™) analysis is a comprehensive, empirical, and forward-looking evaluation of the ability of a business to generate consistent and scalable growth. The Quality of Revenue Operations analysis is unique because it evaluates a company’s potential to grow across the sixteen operational value levers proven to impact future revenues, cash flow, and firm value. The analysis benchmarks an organizations commercial capabilities, assets, and competencies across forty six growth drivers that span the functional and operational drivers of growth. The holistic analysis is unique because it evaluates both your core commercial capabilities and the interdisciplinary competencies that determine your ability to execute growth strategies and realize more growth. These 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 scores provide boards, leaders, and operators a fact-based assessment of the probability of hitting future revenue targets and the root cause issues holding back growth. In addition to scores, the analysis quantifies the latent growth potential in the business, and recommends specific growth drivers and action steps that have the greatest potential to unlock that revenue, continuously improve performance, and realize the full growth potential from commercial assets.

OPERATIONAL LEVRS OF FIRM VALUE



PROBLEMS QORO™ SOLVES: The QORO™ analysis 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 QORO™ WORKS: A QORO™ analysis is a five step process for defining, developing, and executing a best in class revenue operations strategy. Over the course of two 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, define your ‘North Star’ for revenue operations, and identify 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’ revenue operations playbook to support execution and a financially valid basis for allocating resources, sizing investments, 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 one to two hours per week. The QORO™ benchmark analysis 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"/> Product mgt / product dev process |
| <input type="checkbox"/> Vision / mission / value statement | <input type="checkbox"/> Historical revenues vs. goals | <input type="checkbox"/> Client analytics: churn, wallet, etc. |
| <input type="checkbox"/> Sales/GTM plan | <input type="checkbox"/> Budget summary | <input type="checkbox"/> Comp & commission plans |
| <input type="checkbox"/> Sales methodology | <input type="checkbox"/> Revenue forecast model | <input type="checkbox"/> Sales training materials |
| <input type="checkbox"/> KPI dashboard | <input type="checkbox"/> Pricing guidelines | <input type="checkbox"/> Systems / tech stack diagram |
| <input type="checkbox"/> Management goals | <input type="checkbox"/> Product platform access & demo | <input type="checkbox"/> Customer lifecycle roadmap |
| <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 15-30 minutes. This fact base will be supplemented by in depth interviews with selected members of the team which can take 30 -60 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: A QORO™ assessment and delivery of the commercial benchmarks, opportunity assessment, and execution playbook can typically be completed in 3-4 weeks. The deliverables of the assessment include:

- Complete commercial benchmark assessment report and QORO™ scorecard
- A briefing to project sponsor and key project leaders on gaps, opportunities, risks and potential actions
- A revenue opportunity assessment with prioritized recommendations with clear action steps
- Revenue operations playbook with KPI targets and quarterly milestones, timelines and action steps
- Implementation workshop(s) to educate, agree and communicate the learnings and actions from the analysis