

# The Revenue Operations Maturity Model





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# Executive Summary

Revenue operations is one of the fastest-growing functions within B2B organizations and, according to [Sirius Decisions](#), “organizations that align their revenue engine pre- and post-sale grow faster and more profitably than those that aren’t aligned. Revenue operations makes alignment easier by defining a clear set of accountabilities and actions, then formalizing the elements that expand the potential for alignment to succeed.” Hard to argue with, right?

However, even though it’s generally accepted that a dedicated revenue operations function significantly improves the efficiency and effectiveness of go-to-market teams (Sales, Marketing, and Customer Success), many organizations continue to struggle with rallying key stakeholders around a common set of principles to guide alignment.

To make alignment easier, we’ve created the Revenue Operations Maturity Model, a model to help leaders assess their own level of maturity. With key questions for discussion, along with recommendations to help teams move towards maturity, this framework is designed to help leaders identify friction points in their revenue operations function, and facilitate conversations to help align their teams.

If you’re familiar with our [RevOps Framework](#) or our [Deal Health System](#), some of the concepts in this framework will be familiar to you. While a dedicated revenue operations team is often born from the need to manage *Tools*, a well-oiled RevOps team will also cover three other key areas: *Operations*

*Management*, *Enablement*, and *Insights*. Within each of the four areas of maturity in this eBook, we cover each of those pillars, and provide key questions for leaders to self-assess the maturity of their revenue operations function.

This framework is designed to help leaders streamline revenue operations and identify hidden roadblocks that might be contributing to poor alignment. After reading the eBook, you’ll be able to identify your biggest challenges; if you need to dig deeper, each section is accompanied by questions to ask your stakeholders and recommended action items.

## In each section, we identify:

1. [The key behavior you, as a leader, need to demonstrate to reach revenue operations maturity](#)
2. [How varying levels of maturity affect the full funnel](#)

It’s likely that you’ll run into multiple areas that need improvement.

If you could use some help prioritizing which challenges to tackle first, you can request a [free revenue operations consultation](#) with the Varicent team.

# Foreword

## Organizations are navigating through turbulence right now.

Seemingly overnight, the sales landscape has completely changed. Leaders have had to rethink their business strategy, finding innovative ways to reposition their products and streamline sales processes to make them more efficient. The hardest part of achieving revenue efficiency? Knowing where to begin.

For companies to both survive and scale, it's crucial for them to put systems in place to ensure departments are not flying solo. Your sales team needs to collaborate with your marketing team to bring qualified leads down the funnel — and with your customer success team to serve them, retain them, and identify opportunities to delight them and grow the account.

If these teams operate separately, you run the risk of overlapping efforts. Maybe sales reps are regathering data and insights that your marketing team already had. Or your customer success managers are manually inputting redundant data into your sales tools. This separation not only leads to wasted time (and money), but to siloed teams that might be working toward competing and conflicting goals.

**You need a team that can direct traffic and ensure everyone is moving in the right direction — revenue operations.**

Revenue operations provides strategic direction across all revenue-generating functions, which means sales, marketing, and customer success are now part of the same team with the same goals. Your teams stop competing to land first. They move together with focus and speed in the same direction — to drive revenue and improve customer relationships.

**Research backs up the bottom-line benefit of cross-department alignment. Companies that excel at syncing their service and marketing programs see a 2.8 times greater annual increase in company revenue, according to Aberdeen Research.**

# The Four Areas of Revenue Operations Maturity

In addition to the four pillars of Revenue Operations (Operations Management, Enablement, Tools, and Insights), there are four key areas of maturity:



## 1. Service-Level Agreements (or SLAs)

Are binding agreements between different teams in your business that help create alignment, measurement, and focus for measurable revenue growth. SLAs are critical to identifying where you have deficits in your funnel and how you can improve performance.



## 2. Who has Ownership at each stage of the funnel?

Who's the responsible person, or responsible team? At the surface this seems like an easy question to answer, but the key to success is understanding this will always be changing. Prospects will move through the funnel, your team will grow and change, and your segments or territories will shift over time.



## 3. Activity completion and logging is a contentious issue with revenue teams:

How do you find the right balance between admin requirements, shared knowledge, and data required for reporting?



## 4. Funnel Health is the practice of measuring every aspect of your funnel.

Understanding key metrics like frequency of engagement, how often deal attributes are changing, breadth and depth within accounts, age in stage, etc. is critical to reaching revenue operations maturity.

While there are certainly other key processes that need to be optimized to reach full maturity (such as **CRM Management, Reporting, Forecasting, and Rep Management**), the four pillars identified above provide the foundation for these additional processes, and leaders need to prioritize improving behavior within those areas first. For example, while Rep Management is a key part of revenue operations, it's hard to manage reps properly without strong SLAs and processes for Activity completion and tracking.

**We'll tackle each of these areas separately to make it easy for you to identify the biggest areas of improvement, and the concrete steps you can take to reach the next level of maturity.**



# 1. Service-Level Agreements (SLAs)

**Recap: Service-Level Agreements (or SLAs) are binding agreements between different teams in your business that help create alignment, measurement, and focus for measurable revenue growth. SLAs are critical to identifying where you have deficits in your funnel and how you can improve performance.**

A core example of this is a lead response time SLA. How fast should your team get back to an inbound lead? How long does a team member have to take action with a lead before it gets rerouted?

Without SLAs, it's hard to hold your team accountable, particularly at the hand-off points in your funnel where ownership isn't clear.

SLAs should exist across your full funnel and be measured to be effective. This model can help you determine what steps you need to take to increase your team's maturity with SLAs.

## How leaders need to think about SLAs

Ideally, C-level and/or senior leaders are aligned and engaged with the principle of SLAs as both an operational and measurement strategy across the full funnel.

In less mature organizations, leadership may already be aligned on using SLAs as a measurement strategy for one aspect of the funnel, like lead response management. While this is a good start, focusing on one part of the funnel, while neglecting others, doesn't allow leadership to fully leverage the impact of clearly defining, articulating, measuring, and enforcing SLAs.

For those leaders who haven't even considered SLAs as a method to improve revenue performance, or who haven't been able to align their teams around SLAs, we discuss some key questions and strategies to achieve SLA alignment across their revenue function below.

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## What this means for the full funnel

Leaders that define and enforce SLAs across the full funnel can measure the efficiency of every aspect of the funnel, from lead quality, response time, and sequence compliance, to opportunity qualification criteria, opportunity stage entrance/exit gates, and hand-offs to post-sale teams like customer success. With strong SLAs across the Sales, Marketing, and Customer Success funnel, revenue leaders can quickly identify friction points and process or performance issues on their teams.



# Service-Level Agreement Maturity Model

	Level 1	Level 2	Level 3	Level 4
<b>Operations</b>	SLAs are not factored into the operating model.	SLAs are informally discussed.	Formal SLAs have been put into place.	Formal SLAs have been put into place. Adherence and enforcement are measured as a core part of the operating model for the business.
<b>Enablement</b>	Team members, such as marketers, SDRs, or AEs, are not aware of SLAs and how they impact the business.	Some team members are aware of what SLAs, but not how it should impact their day-to-day behaviors. This might vary, such as only the SDR team being aware of SLAs, or Marketing having a desire to put them in place.	Most team members are aware of their own SLAs and are enabled with tools, metrics, or processes in which to meet them.	All team members are aware of each other's SLAs. SLAs are explicitly documented and accessible to the full team. The tools/methods they should use to stay within compliance. Changes to SLAs are clearly communicated. Software is used to streamline the process for both visibility and behavior change.
<b>Insights</b>	SLAs are not defined or measured.	SLAs are defined but not measured.	SLAs are defined and measured.	SLA metrics are incorporated into daily, weekly, monthly, and quarterly reporting. SLA violations are escalated for resolution. The connection between SLAs and revenue performance is analyzed to determine the best path to revenue growth.
<b>Tools</b>	SLA measurement, enforcement, or compliance are not factored into systems decisions.	Rudimentary SLAs are incorporated into some areas of the tech stack, such as lead routing.	SLAs are incorporated into the tech stack across the full funnel.	SLAs are incorporated as a core part of the tech stack, such as for routing, reporting, escalation, or activity compliance. Examples might include Varicent Lift for tracking lead response time.



# Moving Towards Service-Level Agreement Maturity

**Discuss these questions with your key revenue team stakeholders and see how you stack up against the framework:**

- 1.** Does your organization use SLAs across the revenue organization (Sales, Marketing, and Customer Success)?
- 2.** Are the SLAs well-defined, documented, and articulated to stakeholders?
- 3.** Is SLA adherence consistently a topic of discussion in sales meetings, cross-functional meetings between Sales/Marketing/Customer Success, and leadership team meetings?
- 4.** Do managers know what they can/should do to correct SLA compliance issues?
- 5.** Do you have a full-understanding of the key steps in your revenue processes, and where hand-offs occur?
- 6.** Can you name the key points at which your revenue processes frequently break? i.e. time to first contact for leads, or time to close on opportunities?
- 7.** Does your revenue leadership team agree on what the full customer lifecycle should look like, how long it should take, and who's responsible for which parts?



# How to get started:

1. Sit down with your Sales, Marketing, and Customer Success leaders to map out how the full customer lifecycle should look. Make sure you cover:
  - a. How long should it take to follow up on a lead?
  - b. What are your opportunity qualification criteria? How long should it take a rep to collect this information and convert to an opportunity or disposition a lead?
  - c. If you have SDRs qualifying and AEs converting, how long should it take an AE to accept a passed lead? What information do they need in order to accept?
  - d. When does Customer Success get involved? When does the hand-off to Customer Success take place? What information do they need to know to effectively manage the implementation and/or the account going forward?
2. List the areas where your processes are currently breaking. Prioritize 3-5 to start with, and develop SLAs to improve those processes. There's a school of thought that suggests that what gets measured, gets improved.
3. Document the SLAs for the key areas, and make them accessible to your team. SLAs are bound to change as the business changes; make sure you document and articulate the changes, too!
4. Make discussion of SLAs a regular part of revenue meetings. Team members are more likely to stick to SLAs if they know they'll be asked about adherence. Report regularly on SLA adherence metrics, across the team(s).
5. Assess your tech stack. Do your tools help or hinder your reps when it comes to meeting SLAs?
6. Revisit your processes. Is it reasonable for someone to complete the entire process within the SLA guideline, or is it too labor/resource intensive? SLAs need to be achievable and reasonable, and your teams need to be enabled to be successful.

# How Varicent Lift can help

Book a Demo

→ Varicent Lift is purpose-built to enable discussion and alignment around SLAs. Our product comes with baked-in SLAs to help you get started as you refine your own processes. Varicent Lift tracks SLAs across the full funnel, and helps companies drive towards SLAs as a part of their ongoing management strategy, with robust reporting and coaching tips to help managers resolve compliance issues.

→ Varicent Lift is a core tool for companies looking to focus on improving revenue efficiency to grow their businesses faster, more predictably, and more efficiently.

→ Varicent Lift's to-do list, risk cards in SFDC, and email alerts keeps reps aware of their SLA requirements and violations, and prompts reps to resolve adherence issues on their own, before escalation is needed.

## VARICENT LIFT REPORT:

### Lead Response Management

Are all of your leads being picked up by sales reps?

How fast are leads being responded to?

How many sales touchpoints does it take to qualify a lead?

Lead Response

The number of Leads or Contacts that were unqualified

OWNER	ASSIGNED	WORKED	NOT WORKED	PICKUP RATE %	AVERAGE RESPONSE TIME	MEDIAN RESPONSE TIME	AVERAGE TOUCHES IN FIRST 30 DAYS	FOLLOWING CADENCE	BEHIND CADENCE	UNQUALIFIED	NURTURE	QUALIFIED	AVERAGE TOUCHES TO QUALIFY	AVERAGE AGE WHEN QUALIFIED
Target Average	—	—	—	95.0%	Target: 24 hours Max: 48 hours	Target: 24 hours Max: 48 hours	—	—	—	—	—	—	—	—
Average	10.7	7.4	3.3	75.2%	8h 22 min	3h 27 min	2.9	3.6	1.5	1.4	0.2	0.7	4.2	8h 30 min old
Adam Marbrand	1	1	0	100.0%	1 min	1 min	0	0	0	0	0	1	0	1 min old
Alex Hightower	10	10	0	100.0%	12h 47 min	18h 17 min	3.9	1	7	0	0	2	5.5	15h 30 min old
Clubfoot Karl	5	5	0	100.0%	20h 7 min	18h 30 min	1.8	1	0	4	0	0	None	None
Graiden mo Erac	2	2	0	100.0%	0 min	0 min	2.5	2	0	0	0	0	None	None
Hot Pie	7	7	0	100.0%	13h 4 min	18h 54 min	1.7	2	3	1	0	1	0	0 min old
Mance Rayder	3	3	0	100.0%	45 min	21 min	6.3	2	0	0	0	1	7	2h 31 min old
Meryn Triant	7	7	0	100.0%	15h 58 min	12h 15 min	3	2	0	4	0	1	8	3h 53 min old
Mya Stone	1	1	0	100.0%	14h	14h	1	1	0	0	0	0	None	None
Andrew Locke	15	15	0	100.0%	3h 3 min	1h 30 min	1	3	5	7	0	0	None	None

Marketing and Sales leaders get full visibility into lead response, conversion to revenue, and confidence that every lead was worked to its full potential.

Varicent Lift gives you out-of-the-box reports to track pick-up rates, response time, cadence compliance, dispositioning, conversion rates... you get the idea. Stack-rank

your team to encourage sales reps to improve performance each day and get to the top of the charts.

Use this report to easily see who's meeting your service-level agreements and what sales reps are driving qualified leads with a quick glance.



## 2. Ownership

**Recap: In theory, ownership seems easy to define, but it's one of the areas that organizations seem to struggle with the most.**

In practice, there are many issues to resolve. Are AEs the owner for all the Contacts within an Account? What happens when they become a customer? What if they lose the opportunity? And how do you track which SDR last worked a specific lead/contact before the opportunity was generated? Where does Marketing fit into the mix? What about when people leave your organization, what happens to leads, contacts, opportunities or accounts they own?

Identifying clear ownership, aligning the team to it, and creating a simple structure for measuring when this goes off track will help ensure you work every account to its full potential, while maintaining a clean database to improve operations and speed to program delivery. The key to success is understanding this will always be changing. Prospects will move through the funnel, your team will grow and change, and your segments or territories will shift over time.

### How leaders need to think about ownership

C-level and senior revenue leaders need to be aligned on what ownership means, and be engaged with ensuring that the concept of ownership applies across the funnel funnel, and is understood across the organization.

Mature organizations understand that ownership needs to be defined at a granular level. Within each stage of the customer lifecycle, there are many processes, activities, and touchpoints, and leaders need to clearly define who has ownership over and which roles/functions are responsible for each piece.

In less mature organizations, leadership may already have a hand-wavy sort of approach to ownership, like "Marketing owns everything before Sales." To effectively use ownership as an operational and management strategy to improve revenue performance, the points at which ownership changes need to be clearly defined and articulated. Mature organizations also set SMART goals for each owner (Specific, Measurable, Actionable, Relevant, Time-bound) to ensure that each ownership is aligned with accountability and results.

For those leaders struggling with how to assign ownership over specific parts of the customer lifecycle, we share some key questions and action items later in this section.

## What this means for the full funnel

Leaders that fully embrace ownership as a management strategy understand how ownership changes as a lead moves through the funnel, from Marketing to SDRs to AEs to Customer Success - and back.

A strong strategy is documented and well-articulated to the team, and is incorporated into all aspects of the funnel, including forward and backward motions. Poor ownership strategies don't account for backward motions, like a prospect being a no-show for a first meeting booked by an SDR for an AE, and they create confusion about who's responsible for what, which usually leads to ad-hoc practices, like simply changing ownership in the CRM.

**Traffic accidents happen at intersections. I feel the same way about ownership up and down the funnel. If the teams supporting a prospect through their journey don't clearly understand their roles and responsibilities the prospect experience will be poor. In my experience, lack of ownership either results in doing too much of something (are your SDR's asking the same qualification questions as your AE's?) or missing key steps (I thought the SDR was supposed to follow up!). The good news is that your competitors likely don't spend a lot of time here. If your process really hums the prospect will have a terrific experience. Remember, the quality of your sales process sends meaningful signals to buyers about how they will be treated as customers. Focus here and win more!**

**— Dan Shaw**  
*Chief Revenue Officer at Fiix Software*

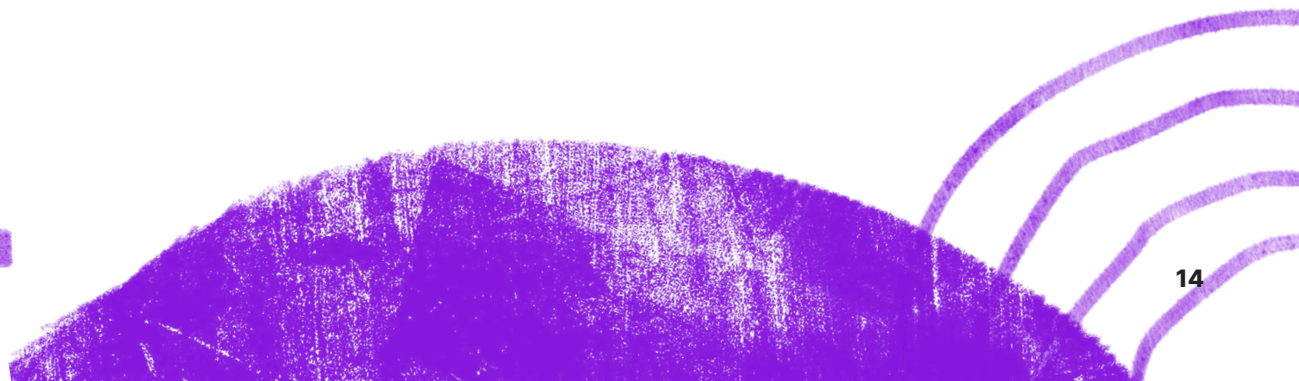
# Ownership Maturity Model

	Level 1	Level 2	Level 3	Level 4
<b>Operations</b>	<p>Ownership hand-offs are not pro-actively considered when designing funnel processes.</p>	<p>Process design for ownership hand-offs exist across some of the funnel.</p> <p>Territory/segmentation modelling, team structures, management layers, and day-to-day operations sometimes factor ownership of the funnel into their design.</p> <p>Some processes are in place for company reorganization or employees leaving to ensure owned items – like leads, contacts, accounts, or opps – are reassigned to be actioned.</p>	<p>Clear, consistent process design for most ownership hand-offs across the full funnel; these take into account forward movement (lead → customer) and backward movement (lost opp → nurture → new lead).</p> <p>Territory/segmentation modelling, team structures, management layers, and day-to-day operations factor ownership of the funnel into their design.</p> <p>Processes are in place for company reorganization or employees leaving to ensure most owned items – like leads, contacts, accounts, and opps – are re-assigned and actioned.</p>	<p>Clear, consistent process design for all ownership hand-offs across the full funnel; these take into account forward movement (lead → customer) and backward movement (lost opp → nurture → new lead).</p> <p>Territory/segmentation modelling, team structures, management layers, and day-to-day operations factor ownership of the funnel into their design.</p> <p>Processes are in place for company reorganization or employees leaving to ensure all owned items (leads, contacts, accounts, opps) are re-assigned and promptly actioned.</p>
<b>Enablement</b>	<p>Reps don't have access to which leads/contacts, opportunities, or accounts are owned by them – it's up to them to create them.</p> <p>It is unclear to reps when they should own a prospect or customer and what they are responsible for while being the owner.</p>	<p>Some reps have views of which leads/contacts, opportunities, or accounts are owned by them.</p> <p>Most reps know when they should be the owner of a prospect or customer in the CRM and what they are responsible for while being the owner, but it's not documented.</p>	<p>Reps have views of which leads/contacts, opportunities, or accounts are owned by them.</p> <p>Reps have some documented processes on when they should be the owner of a prospect or customer in the CRM and what they are responsible for while being the owner.</p>	<p>Reps have highly visible and actionable views of which leads/contacts, opportunities, or accounts are owned by them.</p> <p>Reps have documented processes on when they should be the owner of a prospect or customer in the CRM and what they are responsible for while being the owner.</p>
<b>Insights</b>	<p>You are not able to report on who owns (or owned) what in the funnel at any point.</p>	<p>You are able to report on who owns (or owned) what in the some parts of the funnel.</p>	<p>You are able to report on who owns (or owned) what in the funnel at any point – but are unsure of the accuracy of the reports due to some inconsistency in ownership handoffs.</p>	<p>You are able to accurately report on who owns (or owned) what in the funnel at any point.</p>
<b>Tools</b>	<p>CRM is not set up to track ownership history and hand-offs. Lead routing is either not working or not setup causing leads and contacts to sit idle or get routed to the wrong places.</p>	<p>CRM is set up to track some ownership history and hand-offs, but it isn't doing so consistently. Lead routing is set up in your CRM but gaps exist where leads and contacts end up getting lost in the system.</p>	<p>CRM is set up to track most ownership history and hand-offs. Lead routing is set up in the CRM to get leads and contacts to the appropriate person.</p>	<p>CRM clearly tracks ownership history and hand-offs, or a system like Varicent Lift is being used to identify ownership history. Lead routing systems are used to ensure that leads and contacts get to the appropriate person depending on your routing rules.</p>

# Moving Towards Ownership Maturity

How well-defined is ownership across your revenue organization?  
Ask yourself these key questions:

1. Is there an ownership strategy defined and applied across the full-funnel?
2. Is the entire leadership team, across all revenue teams, bought into it?
3. Is ownership documented and incorporated into your processes?
4. Does your ownership strategy address backward motions as well?
5. Is there a clear process for what happens when a team member changes teams/roles or leaves the organization? What happens to their leads/accounts/opportunities/open activities? What's the timeframe for reassigning ownership on these items?
6. Are you able to find and report on who owns what in the funnel? Do you trust your reporting? Can you easily find out historical ownership of a particular item?
7. Do you clearly track ownership history and hand-offs? Are new owners alerted when ownership is reassigned?





## How to get started:

1. Sit down with your Sales, Marketing, and Customer Success leaders to map out how the full customer lifecycle should look.  
  
Make sure you cover:
  - What are the key hand-off points, and what actions/activities take place within each phase of the lifecycle?
  - Which teams/roles should own each phase? Which other teams/roles might have touch points within that phase?
  - What backwards motions take place within your full funnel?
2. Take the time to have an honest, open discussion before defining your ownership strategy. All revenue leaders need to be bought into the strategy; brute-forcing agreement will only create friction and dropped balls later.
3. Document the owners for each stage of the customer lifecycle.
4. Make sure your teams understand what they're responsible for, what others are responsible for, when the hand-off takes place, and how they'll be notified of the hand-off.
5. Create a process for reassigning leads, accounts, and opportunities when someone changes roles or leaves the organization. Define the timeframe for this reassignment to take place to make sure items don't languish in sales purgatory.
6. Assess your tech stack. Are there tools that could help automate some of the handoffs and routing assignments? Human error is likely to happen in hand-offs, so it's worth investing in tools to reduce reliance on manual processes.



# How Varicent Lift can help

Varicent Lift provides every lead- to-revenue metric you need, across multiple Salesforce objects, to provide an at-a-glance view of ownership conflicts. Varicent Lift's unified view allows managers and leaders to quickly identify red flags in processes, and understand whether hand-offs are taking place on time.

We have also created a Lead Management Worksheet to help organizations to assign clear owners to each stage of their process, and help develop clear, specific, and actionable criteria for each ownership change.

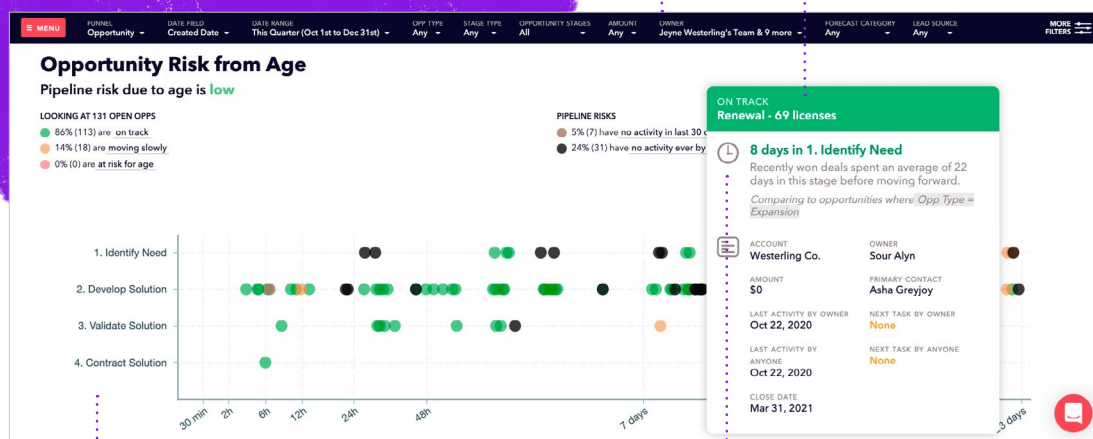
[→ Get the Lead Management Worksheet](#)

## VARICENT LIFT REPORT:

### Risk from Age

Real-time filter by segment, team, territory, etc.

See the red flags on each opportunity – you can even embed this card on Opportunities in Salesforce!



What's the pipeline distribution top-to-bottom?

How long has each deal spent in its current stage?

Varicent Lift show you how much risk opportunities have due to age in stage, total age, activity, and more health indicators to assess the health of your pipeline in one unified view.

Filtering this report by rep or team allows managers and leaders to quickly identify red flags in processes and understand whether ownership hand-offs are taking place on time and in the right stages.



## 3. Activity

**Recap: Activity completion and logging is a contentious issue with revenue teams. How do you find the right balance between admin requirements, shared knowledge, and data required for reporting?**

Further complicating the problem are privacy issues related to automatic data capture. However, without activity logging, it's impossible to measure and report on how leads are being worked, account health for open opportunities in pipeline, and customer management, or understand productivity for remote sales teams. Without activity logging, you create issues around organizational knowledge when your team has turnover, such as not having context for who has been engaged in an account, or what was discussed. This slows down your ability to operate effectively and provide your customers with a high quality experience.

### How leaders need to think about ownership

This one of two areas (the other being funnel health) where leaders' views can make or break success. While leadership absolutely needs to be aligned when it comes to SLAs and Ownership, activity logging and tracking can be particularly polarizing within revenue teams, and it's important for leaders to align

and present a united front when it comes to activities.

The reason activity tracking can be so divisive is that reps often push back on logging and tracking activities, especially when there aren't tools in place to help capture activities automatically. While marketing automation tools often play nicely with Salesforce, with simple integrations that automatically capture emails and other marketing activities in Salesforce, reps are often put in the position of having to log activities manually. Reps often see tracking activities as administrative work that decreases their selling time, and push back against efforts to bake activity capture into processes.

In order to effectively use activity logs as a key part of a strategy, leadership needs to commit to and advocate for the importance of logging activities across the full funnel, whether that takes place through automation or manual efforts. Leaders need to verify that the logging is being done, and hold teams accountable for the activities that do - or do not - get tracked.

We're not encouraging leaders to track and count activities for counting's sake; the leadership team needs to consistently measure activity, understand the insights that activity tracking provides, and use those insights to plan and execute on their growth strategy.

## What this means for the full funnel

Measuring and tracking activities and understanding how activities affect the full revenue cycle allows revenue teams to iterate on their process and focus on activities that yield positive results and eliminate activities that don't contribute to growth. Understanding how many marketing touchpoints, sales calls or emails, demos, meetings, training sessions, and renewal discussions it takes to attract, convert, and retain a customer gives teams the data they need to be laser-focused on activities that move the needle. Activity analysis also helps uncover performance or training issues with team members, and friction points in processes.

**Monitoring activity metrics – like the number of calls, emails, and meetings – has been the standard for sales teams for years now. It hasn't changed much and isn't going to change anytime soon. What has changed is our visibility and ability to report on those metrics so we know what to do more (or less) in order to be successful and understand how activity is impacting leads through to revenue. The biggest thing we can do as leadership is to be aligned with the goals that each team is working towards and hold everyone accountable to the process.**

**— Karen Svane,**  
*Director of Business Development at Varicent*

# Activity Maturity Model

	Level 1	Level 2	Level 3	Level 4
<b>Operations</b>	Tracking, measuring, and management of activity is not considered.	Activity is used at a high-level for rep performance management, such as tracking the number of calls and emails sent per day against a performance target.	Activity is incorporated into some day-to-day operations, including process design and rep performance management.  Activity benchmarks are set by segment to manage performance execution.	Part of company DNA. Activity is incorporated into day-to-day operations, including process design, funnel health, rep performance management, insights, and other areas are required. Measured consistently, system for ensuring compliance, spotting, and rectifying issues, and connected to SLAs.  Activity benchmarks are set by segment to manage performance execution. Activity benchmarks are used to indicate the health of leads, opps, and accounts.
<b>Enablement</b>	Reps are not provided with training on how to log activity.  Providing tools and systems to streamline activity logging is not a priority.	Training material on how to log activity data is available but are outdated and not delivered in a consistent way.  Reps have some tools in place for automated activity capture but a number of manual steps still exist.	Reps are enabled with the why and how of activity logging in a consistent way.  Reps have some systems or tools in place to facilitate automated activity capture or to streamline the process for manual activity logging – but there is some room for improvement.	Reps are enabled with the why and how of activity logging in a consistent way.  Reps have systems or tools in place to facilitate automated activity capture or to streamline the process for manual activity logging. Policies around activity capture are documented and accessible by all.
<b>Insights</b>	Activity isn't a core metric that is measured, or able to be measured accurately.	High level metrics like “opens”, “clicks”, or “calls answered” are used as KPIs in lieu of attaching activities to the full funnel.	Activity reporting is used in multiple parts of the funnel, such as managing the SDR team and incorporated into deal health. Activity insights are primarily used as a management tool, rather than a system to define strategy.	Activity is used to understand full funnel performance, such as measuring lead pick-up rates and sequence compliance; deal health; account health; sales rep performance; or propensity towards renewal.  Activity is connected to what happened after, such as determining if rep activity helps move deals forward or converts more qualified leads.  Activity types (such as calls, emails, chats, video), distribution over time, depth/ breadth of account engagement, and who performed the activity are all factored into the analysis and influence outreach strategies.
<b>Tools</b>	Activity logging is manual in all/most tools.  Activity data is scattered across tools in the tech stack.	Activity logging is automated in some tools.  Most data can be found in Salesforce, but other tools still need to be accessed in order to build out activity reports.	Activity logging is automated in most places where possible.  Salesforce is used as the data source of truth for activity capture across the organization.	Activity logging is automated where possible (such as integrations with tools like Drift).  Activity reporting evaluates cross-object relationships in a time-based manner, with a system like Varicent Lift, or built internally with a custom data warehouse.  Salesforce is used as the data source of truth for activity capture across the organization.

## Moving Towards Activity Maturity

Activity tracking can be a hot-button issue within revenue teams. Before implementing a strategy, it's important to understand:

1. Does the whole leadership team believe that full-funnel activity logging is important?
2. Do leaders hold their teams accountable for what is - and is not - logged in the CRM?
3. Are activities incorporated into metrics? Are activities reported on regularly?
4. What systems are in place to make sure activities are being logged consistently?
5. Is activity incorporated into day-to-day operations such as:
  - Process design?
  - Funnel health?
  - Performance management?
6. Are activities tied to SLAs?
7. Do sales reps understand why activity logging is important? Do they know which activities are logged and how to log them?
8. Do you use activities as a metric to understand:
  - Pick-up rates?
  - Sequence compliance?
  - Deal health?
  - Account health?
  - Likelihood to close?
  - Likelihood of renewal?
9. Is Salesforce used as the single source of truth across the organization?

## How to get started:

1. Sit down with your revenue leaders to understand:
  - Which types of activities are most important to them to understand their piece of the business?
  - Which dependencies exist between the groups that care about a specific activity and the group responsible for logging it?
2. If activities aren't being logged, discuss why.
  - If it's because the logging process requires too much manual effort, discuss ways to automatically capture activities, like Drift.
  - If it's because team members don't understand the importance, create a plan to communicate which activities need to be logged, how they will be used to inform business strategy, and what happens if reps aren't compliantEstablish Salesforce as the single source
3. of truth for revenue activities. "If it's not in Salesforce, it didn't happen" should be your new motto.
4. Use the activity data you have, along with industry guidelines, to set activity goals and benchmarks for your team. Let them know what they're working towards and create some healthy competition.
5. Define specific processes for logging activities, and be clear about where activities are to be logged. For example, if a rep needs to log a meeting, do they log it against the contact, the account, or the opportunity? Reps need this level of specificity if you want them to be compliant.

# How Varicent Lift can help

Book a Demo

Varicent Lift provides a unified view of cross-object activities to help leaders understand how activity is affecting deal health and velocity.

By overlaying deal data with activity data, teams can easily understand which activities have the most meaningful impact on revenue, and surface red flags around likelihood to close or likelihood to renew.

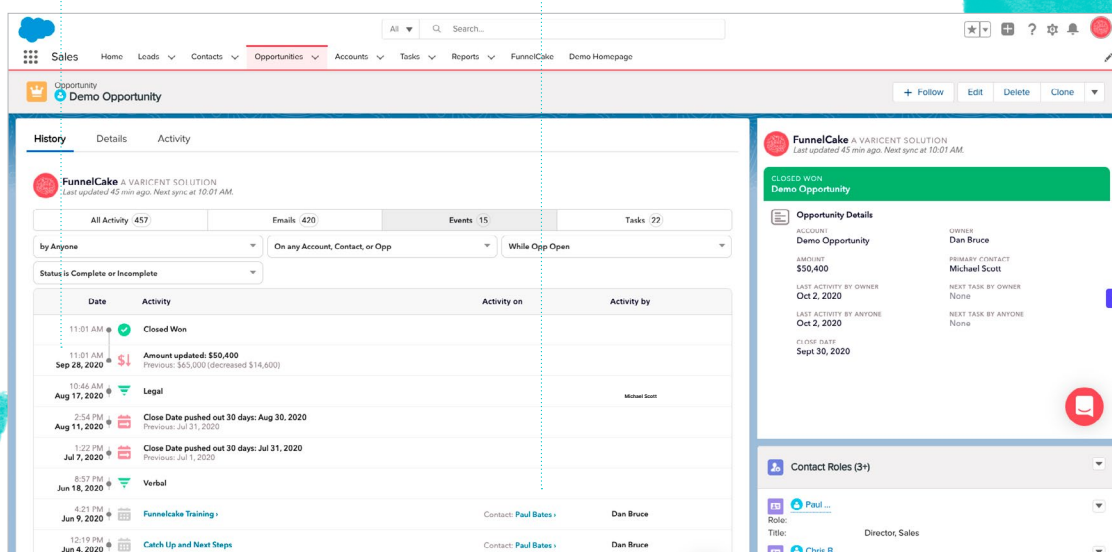
Varicent Lift allows leaders to identify activity-related performance issues and fuel friendly competition by stack ranking sales reps based on activity metrics like response time and pickup rate.

The key to accountability is visibility and transparency. Alerts to sales reps, and escalation alerts to manager, are built in to help build healthy activity habits for your sales team.

## VARICENT LIFT REPORT: Activity History

When did the activity happen?

Who is being worked in the account?



What type of activity?

Who did the activity?

Varicent Lift brings activity history into a single timeline, showing you the lead-to-revenue journey of an account. The interactive timeline makes coaching easy by seeing:

- Who did activity in your organization – Marketing, SDRs, AEs, etc?
- Who is being worked in the buyer account?
- When was the activity logged in relation to other key changes?
- What kind of activity is being done by your team?



## 4. Funnel Health

**Recap: Funnel health is the practice of measuring every aspect of your funnel. There are a number of ways to measure funnel health, from a 3VC model (value, volume, velocity, and conversion rates), to a granular lead health or deal health model that factors in day-to-day management, like frequency and breadth/depth of engagement, how often deal attributes are changing, age in stage, etc.**

Having a realistic, healthy funnel is the best way to predictably grow a business and troubleshoot when the business is not meeting growth expectations.

### How leaders need to think about funnel health

C-level and leadership need to advocate for evaluating the health of the full funnel. Often, leaders determine their funnel to be “healthy” if they have three to five times

pipeline coverage for that quarter’s quota. However, focusing on the end result - closed deals - often allows significant funnel health challenges to go unnoticed and therefore unresolved, and putting organizations in a tough spot one or two quarters out.

Advocating for full-funnel health means reviewing the performance of and mandating improvements across all aspects of the funnel, from leads to opportunities to accounts to customers.

Neglecting the full-funnel leads to a lack of understanding about how the revenue function - and the business - really work. Focusing only on one part of the funnel, without considering how all parts are interconnected, makes it hard to forecast, set targets, or know what levers to pull if things start going south.

In this section, we’ll talk about how to evaluate all aspects of the funnel but for a deeper dive into understanding pipeline health, check out our [Deal Health System eBook](#).



## What this means for the full funnel

When leadership looks at health across the full revenue funnel, they gain a deep understanding of how the health of one area (such as leads) affects another (such as future forecast). Alignment on what a healthy funnel looks like fosters cross-functional and cross-funnel collaboration to resolve issues. Assessing full-funnel health leads to a more predictable business and, in the worst case, provides leaders with early warning signs that they need to reforecast.

**“Creating and managing a predictable revenue machine requires a focus on both systems design and execution, and by designing your revenue system with funnel health in mind, you’ll improve your team’s ability to execute at every stage of the funnel.”**

**— Karen Hayward, Managing Partner & CMO at Chief Outsiders**

# Funnel Health Maturity Model

	Level 1	Level 2	Level 3	Level 4
<b>Operations</b>	Funnel health is not a focus for any day-to-day operations.	Funnel health is brought up in some weekly review meetings, but it's inconsistent.	Funnel health is incorporated into some day-to-day operations – like weekly review meetings and QBRs.	<p>Funnel health is incorporated into day-to-day operations. This means it's a focus for daily standups, weekly review meetings, and QBRs.</p> <p>Funnel health is incorporated into management and coaching discussions, company planning, assessment, and strategic decision making.</p>
<b>Enablement</b>	Funnel health is not a focus for sales reps, managers, or leadership.	<p>Few sales reps understand the importance of funnel health.</p> <p>Some processes and metrics are documented, but are difficult to access by reps and managers.</p>	<p>Most sales reps and managers understand the why and how of funnel health, particularly how it impacts their funnel and what actions they can take to improve health.</p> <p>Processes and metrics are documented and accessible across the team.</p>	<p>Sales reps and managers understand the why and how of funnel health, particularly how it impacts their funnel and what actions they can take to improve health.</p> <p>Processes and metrics are clearly documented and accessible across the team. Changes to expectations are clearly communicated.</p> <p>Systems that enable reps to view their performance and take action on funnel health – like Varicent Lift – are used to streamline efforts.</p>
<b>Insights</b>	Funnel health metrics are not used to assess performance or reduce risk in the funnel.	Some funnel health metrics are used to assessing business performance.	Funnel health metrics are used as core metrics for assessing business performance and reducing risk in the growth plan and the forecast.	The funnel health metrics found in the Measurable Lead Model and the Deal Health System are used as core metrics for assessing business performance and reducing risk in the growth plan and the forecast.
<b>Tools</b>	Tools are not set up to identify health risks.	Tools are used to identify some health risks in the funnel – but most risk goes undetected without manual digging.	Tools are used to identify health risks and make data actionable so sales reps can improve their funnel health.	Tools such as Varicent Lift are used to automate the identification of health risks and streamlining the actions reps should take to resolve poor funnel health indicators.

# Moving Towards Funnel Health Maturity

In order to reap the benefits of tracking and measuring full-funnel health, leaders need to understand where the gaps are first:

1. Do C-level executives and senior leaders understand why it's important to look at the whole funnel?
2. Is the leadership team regularly reviewing full-funnel performance, looking for successes to replicate and opportunities for improvement?
3. Have you defined what a healthy funnel looks like for your business, from leads to Customer Success?
4. Do you understand how different parts of the funnel are interconnected, and how performance affects the funnel downstream?
5. Are you using funnel health metrics to proactively reduce downstream risk? For example, do you measure cadence compliance to ensure that your opportunity pipeline stays well-fed and healthy?
6. How do you define a healthy funnel, across all stages? Are these definitions documented and accessible to the team?
7. What metrics do you track to determine whether your funnel is healthy or not? Do you have benchmarks or thresholds to distinguish between a healthy funnel and an at-risk funnel?
8. Do sales reps and other revenue team members understand why funnel health is important? Do they know the actions to take to keep their part of the funnel healthy?
9. Do sales managers understand why funnel health is important? Do they use funnel metrics as part of their coaching conversations? Are sales managers supported and enabled to enforce funnel hygiene best practices?

## How to get started:

1. In a working session with revenue leaders, define what a healthy funnel looks like from end-to-end, and establish the metrics you'll track and the cadence at which you'll report on them.
  - Some organizations track their funnel and share updates on a weekly basis at a leadership team meeting
  - Some share a retrospective update at their QBRs, although it's often too late at that point to resolve the issues created by last quarter's poor funnel health
2. Make sure you understand relationships and dependencies between different parts of your funnel. In some cases, there is clearly a causal relationship between two areas (i.e. poor health at the lead management stage will directly affect the sales pipeline over the next quarter or two). Other areas may have a correlative relationship, and poor performance in one doesn't directly affect the other. Take the time to ensure that everyone at the table understands how their functions and parts of the funnel affect the others.
3. Create benchmarks for what "healthy" looks like throughout the funnel. The best data is your own data but, in the absence of good quality data, there are several benchmark reports available online.
4. Walk your teams through the funnel health plan. Clearly articulate the benchmarks and measures of success for each team, and make sure each role understands how they personally contribute to the overall health of the funnel.
5. Do a systems review and make sure your systems and tools are set up to capture and report on data for the full funnel. This means capturing metrics from marketing automation systems, sequencing tools, dialers and call recorders, chatbots, or any other tools where you're collecting metrics that matter. Ideally, all of this data is being pumped into the CRM so you see what the health of the full funnel looks like.

# How Varicent Lift can help

Book a Demo

Varicent Lift ingests data from the CRM and automatically flags funnel health risks across a number of metrics, including activity, depth and breadth of account contacts, and time in stage.

Out-of-the-box Varicent Lift uses your own historical data to generate benchmarks to help you quickly assess the health of your funnel and provide insights into risks that need to be resolved.

Varicent Lift helps you:

- Visualize stage-to-stage conversion rates through the full funnel to easily spot trends
- Identify where deals are getting stuck in the funnel early enough to fix the issue and still make your revenue target
- See a detailed history of every related lead, contact, opportunity, or account, with one click from any table in a Varicent Lift report

## VARICENT LIFT REPORT: Rep Performance

How do win rates vary by rep, by cohort?

How many red flags does each rep have?

Are there any risks to pipelined based on inconsistent performance

**Rep Performance**

Looking at rep performance, state of their pipeline, and their salesforce adoption, where Sales Process is Sales.

LOOK AT OPEN PIPELINE WHERE: Close Date is All Time

COMPARE TO CLOSED OPPS WHERE CLOSE DATE: Last 90 Days (Jul 26th to Oct 23rd)

MEASURE CREATED WIN RATE WHERE CREATED: Last 90 Days (Jul 26th to Oct 23rd)

Sales Performance | Pipeline Management | Pipeline Hygiene

Compare reps across closed deals. Identify if there are gaps between win rates, sales cycle length, sales velocity, and...

The average size of opportunities closed won Last 90 Days (Jul 26th to Oct 23rd).

Rep	Win Rate: Closed Last 90 Days	Win Rate: Created Date	Average Sales Cycle Length	Average Size: Won Last 90 Days	Open Pipeline Today	Sales Velocity / Day	Total Amount Won	Average Size: Lost Last 90 Days	Total Amount Lost
Total	3064 won / 3879 closed	1921 won / 4093 created	75 days from 2750 won, ignoring 314 w/o amount	\$1,745 avg of 3064 won, ignoring 11 w/o amount	\$20,219,309 3478 open	\$40,138 / day from 2750 won, 3478 open	\$5,327,291 from 3064 won	\$7,643 avg of 815 won, ignoring 276 w/o amount	\$3,355,144 from 815 lost
Mathias Mullarawan	94.4% 1165 won / 1234 closed	52.2% 1023 won / 1961 created	68 days from 1149 won, ignoring 16 w/o amount	\$262 avg of 1165 won, ignoring 3 w/o amount	\$2,009,370 1888 open	\$3,735 / day from 1149 won, 1888 open	\$304,562 from 1165 won	\$967 avg of 69 won, ignoring 23 w/o amount	\$44,471 from 69 lost
Oudic Bonelli	94.6% 753 won / 796 closed	67.5% 172 won / 255 created	62 days from 130 won, ignoring 20 w/o amount	\$249 avg of 753 won, ignoring 1 w/o amount	\$592,964 136 open	\$367 / day from 733 won, 136 open	\$187,019 from 753 won	\$389 avg of 45 won, ignoring 10 w/o amount	\$12,822 from 43 lost
The Red Lamb	98.5% 194 won / 197 closed	96.9% 188 won / 194 created	26 days from 9 won, ignoring 185 w/o amount	\$286 avg of 194 won, ignoring 1 w/o amount	\$560 4 open	\$43 / day from 9 won, 4 open	\$55,144 from 194 won	\$47 avg of 3 won	\$140 from 3 lost
Aegon Frey (Anglewell)	91.6% 142 won / 155 closed	32% 79 won / 152 created	3.5 months from 127 won, ignoring 15 w/o amount	\$1,203 avg of 142 won	\$1,002,642 211 open	\$1,272 / day from 127 won, 211 open	\$170,881 from 142 won	\$1,461 avg of 13 won, ignoring 3 w/o amount	\$14,611 from 13 lost
Ragor	91.5% 142 won / 155 closed	40.9% 79 won / 152 created	4.5 months from 127 won, ignoring 15 w/o amount	\$1,031 avg of 142 won	\$1,016,130 211 open	\$1,060 / day from 127 won, 211 open	\$228,274 from 142 won	\$1,136 avg of 13 won, ignoring 3 w/o amount	\$9,088 from 13 lost

Every metric you need to track, in one spot, stack-ranked across your team members. You can click into every data point

- Who are the top performing reps? who's on the bottom?
- Is the business consistent across reps?
- Is recent performance creating a risk to the forecast?
- What does pipeline hygiene look like per rep?

# To Maturity and Beyond!

We understand that revenue operations is hard, and that one of the biggest challenges is getting buy-in from stakeholders and senior leadership. Varicent Lift is purpose-built to give revenue operations professionals the data and insights they need to be change agents in their organization and remove friction in revenue processes.

We created this Maturity Model to help revenue operations self-assess their own maturity, and to help them facilitate conversations with leadership teams and other stakeholders. And we created Varicent Lift to help revenue operations evangelize their work and show their stakeholders what's really going on in the business.

Varicent Lift captures all aspects of lead-to-revenue processes, pulling data directly from Salesforce, and surfaces it in easy-to-share and easy-to-consume reports. Varicent Lift reports automate some of the biggest challenges for revenue operations, such as:

- Understanding performance by cohort, to understand if changes and optimizations are working
- Identifying inconsistencies in the funnel, or consistently poor performance in one area of the funnel, so leaders can focus on the most meaningful area of improvement
- Insights into where money is being gained and lost in the funnel
- Understanding the difference between snapshots in time
- Insights into how activity affects the full funnel
- Standardizing on handoffs, and whether SLAs are being met

We believe that the best data is your own data, and we've baked this into our product, using historical data for benchmarking. Varicent Lift flags risks in the funnel, so managers and leadership can resolve issues quickly. With customizable time parameters and SLAs, Varicent Lift flags:

- Opportunities with a close date in the past
- Opportunities with no, or no recent, activity
- Opportunities with no next steps
- Age risks (opportunities older than average, or older than any other won opportunity, in the last 90 days)

While Varicent Lift reports help leaders and revenue operations teams visualize complex aspects of their business, reports on their own do not effect change. That's why we built our platform on a foundation of creating accountability and transparency within revenue processes. Core to the platform are rep and manager notifications, providing reps with a task list of items to resolve to maintain a healthy funnel. The to-do list, available via email or via the Salesforce homepage, empowers reps with a tool they can use to improve, and provides managers with insights into performance issues and coaching opportunities.

**If you'd like to learn more about what Varicent Lift can do for your company, visit us at [www.varicent.com/revenue-intelligence](http://www.varicent.com/revenue-intelligence)**

### **About Varicent™**

Varicent is the leading provider of innovative Sales Performance Management software focused on helping organizations Plan, Operate and Pay to drive sales performance and growth. With a full suite of solutions to assist in smarter territory and quota planning, efficient lead-to-revenue operations, and the fastest and most flexible way to pay sellers accurately and on-time, Varicent is the trusted SPM solution for customers worldwide. Varicent combines powerful SPM technology with its augmented intelligence-powered platform to enable customers to quickly and easily see and address sales trends, problem areas, and opportunities by predicting outcomes and prescribing actions to optimize revenue.

### **For more information**

To learn more about Varicent, visit [www.Varicent.com](http://www.Varicent.com)



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Varicent™

Canada: 4711 Yonge St., Suite 300  
Toronto, ON Canada M2N 6K8

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