RevOps Excellence Checklist for Tech Companies and SaaS

Assess your current RevOps capabilities using this checklist. Identify gaps and prioritize areas for improvement. By following this guide, tech companies and SaaS businesses can ensure they are building a RevOps function that is not just operationally sound but strategically aligned with their business growth objectives.

1. Alignment & Strategy

- ☐ **Define Revenue Operations Objectives:**
  Ensure your RevOps objectives align with the company's overall revenue goals.
- ☐ **Cross-Departmental Alignment:**
  Establish a common understanding and collaboration between sales, marketing, and customer success teams.
- ☐ **Unified GTM Strategy:**
  evelop a comprehensive GTM strategy that integrates RevOps with clear, shared KPIs. A GTM Dashboard is a great centralized source of truth.

2. Data Management & Integration

- ☐ **Data Hygiene:**
  Regularly audit your CRM and other tools to ensure data accuracy and completeness. Assign a resource to do this proactively.
- ☐ **Integration of Tools:**
  Connect your CRM, marketing automation, and customer success platforms to ensure seamless data flow and accessibility.
- ☐ **Single Source of Truth:**
  Create a unified dashboard for all key revenue metrics, accessible to all relevant stakeholders.

3. Tech Stack Optimization

- ☐ **Review Current Tech Stack:**
  Evaluate all tools in use across sales, marketing, and customer success to identify overlaps and inefficiencies.
- ☐ **Tool Adoption:**
  Ensure all team members are trained and actively using the tech stack to its full potential.
- ☐ **Scalability:**
  Assess whether the current tools can scale with your growth plans.

4. Process Standardization & Efficiency

- ☐ **Lead Scoring & Qualification:**
  Implement a robust lead scoring model to prioritize high-intent prospects and ensure consistent qualification criteria.
- ☐ **Sales Enablement:**
  Provide the sales team with playbooks, battle cards, and up-to-date content to support every stage of the sales cycle.
- ☐ **SLA Management:**
  Define and enforce Service Level Agreements (SLAs) between marketing, sales, and customer success to ensure smooth handoffs and accountability.

5. Revenue Performance & Analytics

- ☐ **Pipeline Management:**
  Regularly review and optimize your sales pipeline to improve conversion rates and reduce bottlenecks.
- ☐ **Forecasting Accuracy:**
  Use historical data and predictive analytics to improve revenue forecasting accuracy.
- ☐ **Closed-Loop Reporting:**
  Implement a closed-loop reporting system to track the performance of marketing and sales campaigns through to revenue.

6. Customer Success & Retention

- ☐ **Customer Health Scoring:**
  Develop a customer health scoring model to identify at-risk accounts and opportunities for expansion.
- ☐ **Churn Analysis:**
  Regularly analyze churn data to identify trends and proactively address customer retention.
- ☐ **Account Expansion Strategies:**
  Establish a proactive strategy for upselling and cross-selling to existing accounts.

7. Performance Metrics & Reporting

- ☐ **Key Metrics Tracking:**
  Monitor core metrics such as CAC, LTV, ARR, NRR, and pipeline velocity.
- ☐ **Weekly/Monthly Dashboards:**
  Create dashboards for real-time tracking of key performance indicators.
- ☐ **Quarterly Business Reviews (QBRs):** Conduct regular QBRs to review performance, identify gaps, and plan future strategies.

8. Continuous Improvement

- ☐ **Feedback Loops:**
  Establish regular feedback loops with sales, marketing, and customer success teams to iterate on processes.
- ☐ **Market Trends Monitoring:**
  Stay updated with market trends and adjust RevOps strategies as needed.
- ☐ **Training & Development:**
  Continuously train teams on new tools, techniques, and best practices to maintain a competitive edge.