

B2B EXPERT ROUNDUP:

WHAT IS THE LINK BETWEEN
REVOPS AND CLIENT EXPERIENCE?

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The need to deliver great client experience (CX) and support has always been a priority. However, the trend of companies shifting toward a more revenue-focused model has created a greater emphasis on creating impeccable CX.

Clients are integral to any business. Therefore, setting up a strategy to consistently maintain and improve client experience should form part of every organization's DNA. Boosting retention and gaining credibility through positive feedback and reviews is a requisite for success.

WHAT IS CLIENT EXPERIENCE?

Essentially, client experience encompasses all interactions prospects have with a brand as they progress through the buyer journey and convert, as well as how they found, or continue to find the services or products purchased.

A great client experience is not only aligned with client expectations but also their specific needs and preferences.

Part of shaping experiences to match each client journey map starts with establishing a solid digital experience. As the way sales, marketing, and prospects themselves interact continues to digitize, focusing on providing a seamless and intuitive experience is crucial.

LOOKING TO GET STARTED OR OPTIMIZE YOUR EXISTING STRATEGY?

Read our article, [6 Ways to Revolutionize Your B2B Digital Experience](#) for actionable insights on how to craft omnichannel strategies that facilitate sales by encouraging prospects to connect with your brand. →



INSIGHTS AND RECOMMENDATIONS FROM INDUSTRY EXPERTS

As more organizations begin to adopt a holistic, RevOps model to align their business, developing a clear understanding of the role of RevOps for client experience is essential. To continue our RevOps series, we reached out to demand generation experts from our previous expert roundup for their opinion on how RevOps shapes the client experience.



Mary Barba

Revenue operations, or RevOps for short, cannot happen without focusing on improving the client experience. This is because the client is the one who brings in revenue to your business to begin with. Without revenue, there is no need for an operations team to focus on improving it.

The connection between RevOps and the client experience starts in your company's "flywheel." At HubSpot, instead of thinking of our business as a funnel, with leads coming in at the top and clients falling out at the bottom, we think of our business as a flywheel, which is a model adapted by HubSpot to explain the momentum we gain when we align our entire organization around delivering a remarkable client experience.

This flywheel is based on the inbound methodology. Inbound is a method of attracting, engaging, and delighting people to grow a business that provides value and builds trust.

Here is how this approach to how inbound business ideally works: First, your company attracts prospects through helpful content and other online resources. Then, your frontline employees engage those prospects and turn them into clients. Your clients are then so delighted by the experience you provided them that they go tell their friends and colleagues about it and that positive word-of-mouth then attracts more prospects for you to engage with and delight.

This is where RevOps' inseparable connection to the client experience happens. It is found in the concepts of "force" and "friction."

Force is any program or strategy you implement to speed up your flywheel, and friction is anything that slows down your flywheel. You can think about force as the places your company makes investments to make the client experience better.

Friction is a much more nuanced tool than force, and it is very much in line with the sorts of things you will do in RevOps.

There are two main ways to go about removing friction from your flywheel and client experience. You can remove the friction that your clients and prospects face directly, and you can remove friction from internal teams who work with your clients and prospects.

Some examples of friction your prospects and clients might experience include:

- Long wait times when calling or chatting in for client support,
- A lack of response to internet forms,
- Difficulty finding information on your website,
- Requirements to talk to employees for tasks that could reasonably be handled through self-service options,
- Delays in delivering your product or service,
- Faults in your products or services,
- High prices, or
- Surprising fees.

Anything you can do to improve your client experience will have a positive impact on your revenue, as well as your clients.

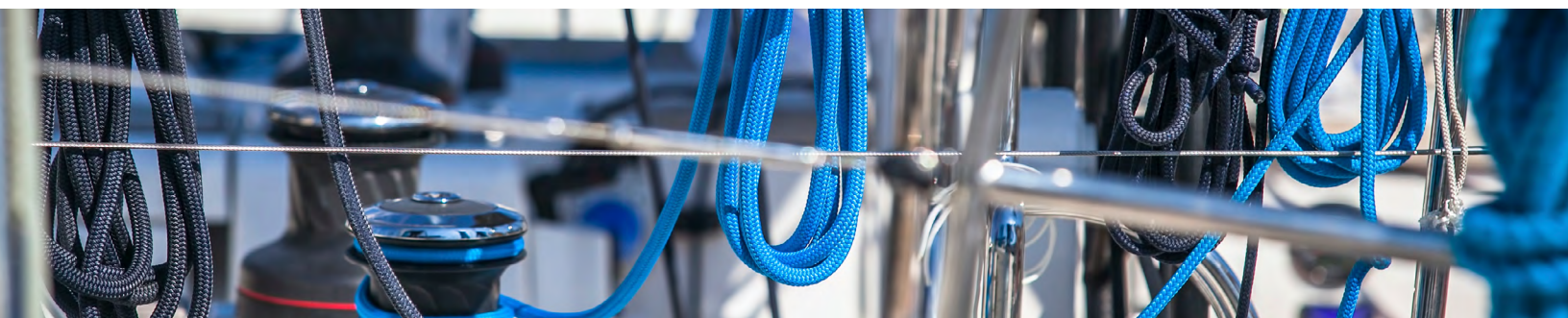
For internal processes, the approach is the same. Search for friction that holds your client-facing teams back from providing a world-class experience to your clients and prospects.

Some examples of internal friction include:

- Different systems of record, or sources of truth, for different teams;
- Difficulty finding client information,
- Duplicate or conflicting processes for different teams,
- A lack of consistent processes for individual teams,
- High employee turnover, or
- Insufficient employee onboarding and training.

Once you have a list of friction points in your company, order it in terms of priority, and start finding ways to remove them so that you can improve your client experience and your teammates' ability to serve your clients.

All of these things are part of your job as a RevOps professional. RevOps and the client experience cannot be separated. To learn more about this, check out the [Revenue Operations Certification](#) I just launched in HubSpot Academy, which is where I pulled all of this information from.



About the Author:

Mary Barba thrives as HubSpot Academy's Associate Inbound Revenue Operations Professor. She holds a Bachelor of Science degree from Drexel University and is certified in "Instructional Design Essentials: Models of ID" from LinkedIn Learning. She holds HubSpot Academy certifications in Inbound, Inbound Marketing, Inbound Sales, HubSpot CMS for Marketers, Service Hub Software, HubSpot Marketing Software, HubSpot Sales Software, and Content Marketing.

Mary is a self-proclaimed "philomath" (a lover of learning) with a fanatic-level admiration of all things SaaS, tech, and inbound and has a thirst for perpetual skill development. In her spare time, you can find Mary dreaming of being Leslie Knope from Parks and Recreation and spending countless hours with her family, friends, and dogs.





Briana Yarborough

Churn. Upsells. Cross-sells. If there is a way to generate more revenue, RevOps uses data intelligence & technology to find gaps and improve the client experience (CX) therefore increasing the attainable revenue from that team. Happy clients bring growth through many channels; their accounts, loyalty, and expansion, as well as organically by sharing great products with other practitioners.

Revenue operations is about looking for these opportunities throughout the buyer's journey and using integrated systems and metrics to drive visibility 360° to stakeholders.

About the Author:

Briana is a seasoned RevOps Leader, co-founder of a RevOps solution in development, and serves as an advisor and executive leader for several high-growth start-ups where she utilizes her 15+ years of expertise in GTM strategy, SaaS, Supply Chain, Revenue Operations, Strategy, General Operations, Finance, Procurement, and Business Intelligence.

Briana is an active thought leader of RevOps in multiple revenue communities and is a champion and engaging member of a number of communities created for marginalized groups. She most recently received recognition for being one of the top 25 RevOps Leaders of 2022 by Revenue.io, and has been featured in leadership articles sharing her road to RevOps story.



Cheryl Mortenson

The link between revenue operations and client experience is treating everyone with whom you interact like a valued client. It ensures high-quality engagement at a fundamental level and translates to everyone whom it touches. Celebrating an Ops team is critical. Recognizing their contribution to the company's success places an increased value on client success throughout the organization.

About the Author:

Cheryl is a Client Success Manager and Sales Operations leader at Abricto Security with 15+ years of experience in backup/disaster recovery, networking, information security, and critical communications technology industries.

She has specialized in business analysis, administration, and reporting, assisting several high/hyper-growth companies to mature their processes to increase efficiency and productivity while ensuring an exceptional client experience.



Nate Rivera

Often, CX is viewed as something that is related to external persons; the reality is that clients are both the people who pay you for your product and the people that you pay to build and run your organization. Revenue operations focus on providing solutions for internal and external entities.

What we typically find is that if a process is inefficient or completely unnecessary to achieve the end goal; it is essentially a waste of time and energy.

Through automation, optimized UI/UX, and consolidated processes we are able to improve the experience of our employees.

Better employee experience means happier employees. Happier employees are more motivated to care about the work they do and this leads to a better product, more involved sales teams, and ultimately a better client experience when they interact with your organization.

About the Author:

Nate is a revenue operations consultant who built his career by following the road less traveled and committing to a life of sustainable happiness and professional success. Through his unconventional approach to life, he has found success by approaching business with a holistic mentality and emphasizing the philosophies of intentional living.



Jasmine Powers

26% of clients will stop doing business with a company after a bad experience. Among other things, RevOps leverages data to improve campaign performance, streamline client touchpoints, optimize experience with cohesive messaging and transactions, and leverage feedback loops to inform product and process decisions. The result is ideally a better experience for the client which reduces churn and yields a higher client lifetime value (CLTV).

About the Author:

Jasmine Powers is the CEO of Jasmine Powers Multimedia, a full-service Go-to-market strategy and RevOps consultancy providing content marketing, revenue operations solutions, and training for SaaS companies, digital agencies, and nonprofits. She resides in New Orleans.



Trent Anderson

RevOps executes and iterates on the go-to-market (GTM) motion – who is central to any GTM motion? Clients. So, in that way, RevOps is client experience. Client insights should power marketing messaging which should support sales channel selection and execution. As organizations expand into new markets, the same process applies. RevOps, fundamentally, exists to help organizations educate and empower best-fit clients.

About the Author:

Trent's Head of RevOps at Podchaser, the podcast discovery database used by brands, agencies, and media organizations to power up their podcast insights.



Shantanu Basu

RevOps is, essentially, the alignment of all the internal elements of the GTM value-chain in order for the business to deliver the best value to the external value-chain of partners and clients.

It is not difficult to have good Sales, Marketing, CS, and CX teams. But, if they are not all aligned and managed to a common set of goals, as set by and measured by a unified RevOps team, all you have are excellent Silos and probably a poor client experience.

About the Author:

Shantanu Basu helps hyper-growth businesses by aligning internal and external value chains in a way that maximizes the capture of the value being created by product or service teams.

Whether scaling a high-growth tech unicorn, transforming a 200-person organization, setting up new business development teams in China, or teaching his sons to work their way through a negative-banked turn on a Karting circuit, Shantanu is most excited when he is helping solve fundamental problems and spurring on growth by capturing value.



Colin Veerkamp

RevOps is the complete client experience. It touches all departments through the clients' lifecycle by providing the strategic business integrations of Marketing, Sales, and Service Departments together. By allowing these teams to communicate without silos, day-to-day processes can be left in the respective departments to be improved and iterated on.

In doing so, the RevOps team can effectively help to increase the net revenue retention rate (NRR) and the client lifecycle.

About the Author:

As a leader in Revenue Operations, Colin Veerkamp brings his experience from the back offices of securities and uses this to think creatively about how to align all business units around the client's lifecycle and the revenue cycle by designing and implementing systems across the organization through tools, automation, and best practices.





David Verwey

It is without a doubt that the core of any successful business, no matter the industry, is an exemplary client experience infrastructure and evolving strategy to meet changing trends. RevOps simply represents the next stage for ensuring that CX meets current client expectations and needs and that the entire organization is aligned to meet those needs.

The relationship between RevOps and client experience is crystal clear and symbiotic. After all, without clients there can be no revenue, and similarly, without the data insights from RevOps, client experience strategies are unlikely to reach their full potential.

If you are looking to enhance your CX, start with your team. Each team member should be aligned with the same goals to not only ensure that clients receive a consistently high quality and seamless experience but to also solidify teamwork.

It is important that your team is satisfied and feels motivated. Meet regularly to field their opinions and help them feel understood and unified as a team. Any internal friction or hindrance that can be reduced, will translate to a client journey map with better flow.

Leverage data and feedback and share findings across your organization to avoid siloes. This should go beyond the collection of insights facilitated by RevOps and should include client feedback. Their opinion and perspective are key to shaping your strategy and the development of products and services specific to different target markets.

Essentially, it all boils down to the following: any improvement to client experience translates to an exponential boost in revenue by encouraging greater CLTV and more word-of-mouth sales. Given this strong link between client experience and RevOps, adopting a revenue focus is more than logical, it is necessary.

About the Author:

For the past 14 years, David has assisted countless North American technology companies expand into and grow rapidly within international markets. Today, as EMEA Vice President and DPO at INFUSEmedia, David has established and continues to lead the rapid growth of the EMEA division and its operations, managing the sales, marketing, and sales enablement teams from his base in the United Kingdom.



Jeff Medley

I use this analogy often – having a solid foundation allows you to build more easily, efficiently, and effectively. Without a solid foundation, the more you add to it, the higher the risk for major issues to arise. RevOps is the foundation of client experience – it focuses on sourcing new clients, and optimizes the handoff from Sales to Implementation, and once again from Implementation to Success.

Throughout the client sourcing and onboarding process, it is the responsibility of the RevOps team to enable communication, data, and processes as effectively and efficiently as possible.

The client experience begins with the marketing and sales teams and ends, ideally, only when one of the companies involved in the relationship goes out of business. Revenue Operations helps to build the foundational processes for all the departments involved with obtaining a client and ensuring a long, happy relationship with them.

About the Author:

Jeff Medley has spent the last 10 years of my career helping young technology startups navigate hyper-growth environments, acquisitions from both sides of the coin, and growing teams and tech stacks. From pre-Series A to mature, private-equity-backed organizations. Jeff has built teams from the ground up and established scalable processes for successful organizations. Jeff is currently the Head of Revenue Operations for Covered Insurance Solutions and the owner of Spok Revenue Consulting.





Ben Stroup

RevOps creates a listening platform that empowers and enables leaders and organizations to observe, learn, adapt, and pivot with their clients. It is the architecture necessary to be flexible and responsive.

This is where data can provide a true and accurate narrative around your present, not just your past. It is not uncommon for prevailing narratives among executive teams to stand in contrast to each other as well as the objective data once measured. You need to resolve that dissonance. Otherwise, you risk making decisions without all the information.

Data is not someone else's job. It is yours. That means every leader, manager, and supervisor has a responsibility to use data to co-create and collaborate in real-time through interdisciplinary and interdependent teams to continue to bring value-creating products and solutions to market that expand reach and engagement. This is foundational for pivoting into high performance amid an unstable environment.

About the Author:

Ben Stroup is Chief Growth Architect and President at Velocity Strategy Solutions, a next-generation business strategy, and management consulting firm focused on helping ambitious leaders align teams, simplify technology, eliminate friction, and drive revenue. He is a futurist, disruptor, and data champion having served organizations from \$5MM to more than \$500MM in revenue for more than 18 years.

*Ben has written and edited dozens of books on leadership and growth and is a frequent speaker, podcaster, and guest for business and industry groups. His most recent book, *Master the Pivot*, was released in 2020. Ben and his wife and two boys live in the Nashville, Tennessee area.*





Mohit Babu

RevOps ensures that each data point generated through the omnichannel engagement of clients is put in the right perspective with relevant actionables. This ensures a smoother client experience as they explore the product in a preemptive manner.

For example, the key data captured during the sales & delivery process, along with engagement metrics, could be the feeder for feature enhancement without the client explicitly requesting it, enhancing the wow factor for clients.

About the Author:

Mohit is the head of RevOps at Skit.ai. He was previously associated with Exfinity Venture Partners as Principal where he was responsible for the identification and closure of possible investment opportunities.

Prior to this role, he was the first employee in the Strategic Initiatives Team at Regalix supporting product and market expansion.

He started his career with Finisar Corporation, Malaysia as a Process Engineer where he was involved in project management and process excellence for engineering and manufacturing environments.





Wayne Kelley

Ensuring that your client experience is top-notch and thoughtful is key to building value behind your revenue operations plan. Anyone who has worked in marketing and revenue operations has had that experience where a client doesn't understand the value of your services and is very skeptical of the value you provide. Leveraging a thoroughly planned revenue operations plan that prioritizes the client's challenges, goals, and insights is a great counter to the negativity of unsure client team members.

Maintaining an open line of communication with your clients and asking the right questions will help ensure you are on the pulse of your client's needs to achieve their goals and insights to understand their challenges.

You will find that both of these aspects greatly impact the client experience and your ability to create the perfect revenue operations plan for your clients.

About the Author:

Wayne Kelley graduated Summa Cum Laude from Arizona State University with a degree focused on Integrated Arts and Science. Wayne has been in marketing for the past 5 years working mostly in digital marketing, content marketing, event marketing, and Marketing & Sales Implementation. Most recently, Wayne has taken his career in a new direction by focusing on Revenue Operations with a HubSpot elite agency.





Don Raleigh III

There is a direct correlation to how revenue operations managers can optimize the experience of our clients and it can either be perceived as negative or as a net positive. Ultimately, it comes down to how new initiatives and opportunities are presented to your clients. When approaching RevOps, it is vital to take the business's goals and think of the journey or experience that you are taking your client through. If you only cater to the owner's perspective, you will fail to realize the gaps or areas of opportunity that your clients are actually seeking you out for.

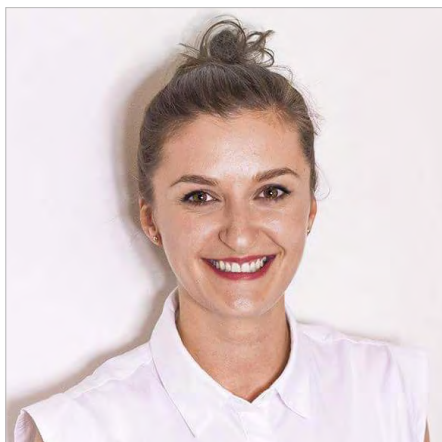
Our best advice is to sit down with some of your top clients, and ask them why they work with you, what attracted them to you, and what the deciding factor was when they selected you as their top choice.

If you hone in on those areas, not only will you see your RevOps team have a paved path to success, but you will find that your clients will appreciate you and value their experience with you.

About the Author:

Don Raleigh III is the second generation at Evolve Systems and operates as the RevOps Manager for the team. Don leads his team by being a connector, collaborator, and passionate team member. By working with clients as well as partners, it is Don's role to ensure that both parties have mutual success when engaging in formal business partnerships.





Katerina Manova

There are two types of links from my perspective. An external one that monitors client journey and an internal one for internal processes. The external makes sure that potential clients and existing clients are provided with the best journey through the buying and upselling process in terms of communication, education, and implementation.

The internal one is a feedback loop on the internal processes from Marketing, Product, and post-sales teams (client success, implementation engineers, support, etc.) to make sure that everything runs seamlessly. These two links play a crucial role in making the whole company align on the best possible client experience.

About the Author:

Currently on maternity leave, combining it with sharpening data analytics skills by learning Python and SQL. Experienced with mostly B2B SaaS companies start-ups in Europe and US. Developing their operation teams from scratch to scale.



Jack Hargett

Clients, in the eyes of Revenue Operations Managers, are the same as the internal teams that they serve such as Sales, Marketing, Success, and senior leadership teams, to whom they provide data visibility and pipeline analysis.

The responsibility of revenue operations is to look at the big picture and do what is best for the company as a whole. Streamline internal processes, improve the usability of existing systems, and keep client-facing departments aligned to ensure that hand-offs between teams are as seamless as possible.

About the Author:

Jack Hargett is the Founder of BisonRS, a Revenue Operations Recruitment company based in the UK, serving SaaS Technology companies from startups to enterprises in the UK and Europe.



Karl Evans

One of the core purposes of a RevOps function should be to help an organization attract, engage and delight, both new and existing clients, through the implementation of business strategies and sophisticated process automations that improve engagement; enabling marketing, sales, and client success teams to achieve scale, while continually improving client experience.

Therefore “CX” needs to be ever-present in the minds of RevOps professionals.

About the Author:

Karl Evans is VP Revenue Operation for EdgePetrol. He is a business growth strategist, process automation specialist, and fractional RevOps expert, specializing in helping companies design/implement scalable business processes and strategies that optimize both growth and profitability.



Sibil Samuel

RevOps are the new gatekeepers of Client Experience, as they enable processes, Go to market (GTM) strategies and technology implementation. They help companies build an operating model that will drive alignment across all teams, build efficient processes and generate predictable revenue with data, insights, and orchestration capabilities.

RevOps teams are responsible for ensuring that everything works, from segmenting, contacting, managing client data, nurture programs, and retention. They are the people who set every client-facing team up for success. As such, they are the orchestrators of the client experience.

About the Author:

Sibil Samuel is the marketing ops Lead at Assent and a RevOps nerd. Sibil has been in the Operations and Technology fields for over 10 years guiding companies to develop and execute tech stacks and processes that will support their GTM strategy and growth.



Mark Kelly

My truly honest belief is that a strong RevOps team acts as the engineering team for the revenue engine in an organization. Their expertise spans Sales, Marketing, Client Success, and even dips into Product Development, and HR.

Their knowledge and experience about how revenue is created, maintained, and lost in an organization, combined with a deep understanding of the drivers of each, enables them to not only have an opinion but one that is typically data supported.

They are able to see around corners that others cannot, and therefore enable the organization to provide stronger buying processes, and much better client experiences because of this.

About the Author:

Mark Kelly is a strategic and visionary executive who has leveraged his unique combination of education, business experience, and marketing and sales leadership roles (from start-ups to F500 companies) to transform revenue teams into high-performing revenue generation engines.

Mark uniquely focuses on the intersection of finance, operations, technology, sales & marketing, and analytics. He is active in the business and technology communities across Kansas City, where he lives with his wife and 3 sons.



Cal Cavness

In order for revenue operations teams to successfully drive revenue growth, teams must be focused on the client experience. RevOps is intended to operate as a holistic-thinking, growth loop model that takes into account not only the acquisition of new clients but the retention of those clients as well. If RevOps teams put the client at the core of operational decisions, the revenue will follow.

About the Author:

Cal Cavness is the Head of RevOps at MODintelechy, an agency providing marketing, sales enablement, and renewals operations services. He leads a holistic approach to drive revenue for clients—by creating focus, simplifying processes through data-driven insights, and encouraging collaboration between marketing, sales, client success, and business intelligence.



Mario Maier

Where isn't a link between RevOps and CX? RevOps has always had direct consequences on your CX. It starts with the first client touchpoints in Marketing Ops, then over the complete buyer journey in Sales Ops, ending with long-time satisfaction and retention rate management in Client Service Ops.

Your CX chain is always as strong as the weakest chain link. If you have great marketing ops and constantly produce relevant MQLs, but your Sales Ops team does not push the leads to the corresponding sales rep and they do not manage the follow-up, no value is created.

About the Author:

Mario Maier is a self-employed CRM & RevOps consultant & trainer with a 100% focus on the HubSpot CRM platform and 12+ years of B2B practical experience. His consulting focuses on the strategic, organizational, and technical introduction of marketing, sales, and client service automation based on the HubSpot product landscape.

After more than a decade of experience with international start-ups and corporates, Mario has been supporting companies as a freelance consultant since July 2019 with the introduction and optimization of the NextGen CRM platform and has more than 50 HubSpot projects in the corporate and enterprise area.



Matt Hadreas

What is more profitable than improving the client experience?
We are in a subscription economy where it is all about land, retain, and expand.

Clients that have a good experience renew and grow, simple as that. In RevOps, if you can improve the CX by reducing friction pre-sale, help reps do better discovery to smooth out rough edges during onboarding, and utilize data to identify churn risks proactively so account teams can engage the right clients at the right time, then this should be a priority.

About the Author:

Matt Hadreas is a passionate RevOps and GTM leader, curious technologist, and father of 2 incredible kiddos.



Nelly Nechaev

RevOps is all about making sure all departments are aligned, i.e. marketing with sales, and both with client success & service\support.

With a defined and smooth data flow process between the departments, each department knows how to give the best client experience, based on the information they share with the other departments.

With this, clients feel that they are communicating with a well-aligned company, that they are in good hands, and that they are being seen along the whole process.

About the Author:

Nelly Nechaev is the VP of Client Success at ScaleOps - Israel's leading Revenue Operations Company. With extensive experience developing and managing teams and implementing processes & systems, Nelly develops catered sales processes for multiple SaaS companies, while building the company's foundations internally.

At ScaleOps, she works with B2B companies of all sizes to build and optimize clients' operational foundations - looking at the full funnel - so that they can scale in the best way possible, and increase revenue.





Courtney Chatterton

The client experience should inform every step of your revenue plan, period.

When you are constantly in the weeds trying to solve data and process issues alone, it is easy to lose sight of what's happening on the client's side of things. Your clients are your most vital - and scarcest - resource.

Too often, we focus on current and short-term earnings that seem to have little to no effect on long-term business plans. Cross-sell and expansion often get oversold as the cure-all for a fall in revenue. But they are not a short-term solution and can prove catastrophic for your revenue in the long term.

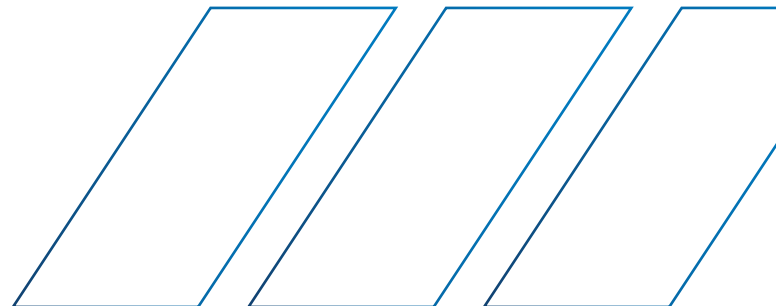
Hitting your client base with frequent messaging (i.e. email incentives and offers, outbound motions) and incentives that do not resonate drives up your cost, sometimes making client marketing more expensive than acquisition.

In this digital day and age, we are all seeking to build meaningful and impactful relationships. The link between revenue operations and client experience is understanding your current relationship status, how it is impacting revenue, and the steps you can take to craft a better, more meaningful experience for each and every client.

Then, take that data, build a better ICP, and find a way to make that happen over and over again.

About the Author:

A former RevOps Analyst turned Business Strategist, Courtney Chatterton is a Writer and Consultant in the B2B Tech space. Her interests include improving email marketing experiences, "life-hacking" marketing automation tools, thinking holistically about the GTM process, and adding far too many Slack emojis to every workspace she joins. Courtney lives in Chicago with her girlfriend and their two cats, where they advocate for accessible mental health and LGBT+ youth, all while critically analyzing media and pop culture. You can learn more by visiting her website, courtneywrites.tech





Sam Arnold

What do clients care about? – Good responses to their situation delivered quickly. How does an organization deliver these consistently? – A frictionless flow of information between individuals and a clear definition and process for responding. Simple, right? – Never. For client-facing teams, RevOps is make-or-break.

There are so many systems today that contain information and so many teams and stakeholders trying to coordinate with one another that without a guiding mind (or team of minds) conducting the orchestra, it devolves into pure chaos. Show me consistently delighted clients and I will show you successful revenue operations happening behind the scene.

About the Author:

Sam Arnold is a Strategic Account Executive at CaptivateIQ, where he advises RevOps and Finance teams on the adoption of new technologies for performance-based compensation plans. He lives in San Francisco, California.



Ana Rottaro

Especially in SaaS, the client experience and strategy should be informed largely by RevOps. RevOps is responsible for setting the client experience off right by providing a smooth transition post-sale and then ensuring annual recurring revenue (ARR) is retained and expanded. Recurring revenue needs to be closely looked after, especially as companies grow and begin to outperform new revenue. Your first clients are also likely the easiest to attain with the lowest client acquisition cost (CAC).

Losing them due to poor onboarding is a big mistake because the cost to replace them is much higher. If you are in an industry with a limited market or a highly connected market, you should not delay putting resources into client success.

About the Author:

Ana Rottaro graduated from Carnegie Mellon University with a degree in economics. After interning at the US Dept. of Treasury, she decided to pursue a career where she could see the impact of change quickly—Ana found this niche in small, high-growth companies.

She is passionate about connecting the dots between lofty, ambiguous C-level goals and simplifying the work-streams of the teams needed to achieve those goals.



Wendy Lampert

I believe that the hand-offs throughout an entire process are the most pivotal for a successful client experience. When there is a break in the synergy, it is not only noticeable, but a cause for concern for the client and confusion. All it takes for a client to second-guess their decision is that split second.

The best client experiences are easy and do not require much work or effort on their part. The RevOps team should help to drive these seamless hand-off processes throughout each department all the way to the end of the cycle and back to the beginning again to ensure retention and ultimately drive revenue.

About the Author:

Wendy Lampert graduated from Purdue University with a BS degree in Hospitality and Tourism Management. Wendy has spent over 10 years servicing internal/external clients and has learned and redeveloped the processes, as well as blueprints of each company's successes.

Her journeys have helped both broaden her horizon and appreciation for people, cultures, and methods, as well as, contributed to her success as a collaborative leader with a deep expertise in operations, people, training, and development, along with systems and processes.

Lampert is dedicated to self-improvement, reflection, and continually challenges herself and her teams to exceed expectations.





Alyssa Yap

Revenue operations is about aligning the revenue-driving teams in the client journey i.e. marketing, sales, client success, and client service. Marketing drives brand awareness, brand equity and nurtures prospects. Sales manage the prospect relationship, whether it is inbound or outbound, through their outreach. Client success and Client service look after the post-sale relationship with the client.

Interactions with these teams have a direct correlation with the client's experience. Imagine if the sales team asks about the prospect conversation that was already collected by marketing, that would be a very annoying experience for the prospect.

The sales team should tailor their responses based on information they already know about the prospect, to create a much more personalized and thought-out experience with the brand. These teams need to be aligned with goals and the client journey. It is a vicious cycle and everyone has a role to play to keep this RevOps wheel spinning.

About the Author:

Alyssa Yap helps businesses align and streamline revenue teams with the right tech stack, optimize CRM (so they can actually get useful insights), and automate processes—by leveraging HubSpot as the central business engine.

Her approach to marketing is data-driven; focused on optimizing the buyer's journey and using the inbound methodology with RevOps.

Alyssa believes that marketing and sales work together like Batman and Robin—you get the best results when both work in tandem. Her experiences in client service and sales have given her a strong understanding of client pain points to recognize the "why" behind their behavior and develop client-centric marketing strategies.

FINAL THOUGHTS

Thanks again to our contributors, we have been able to break down what makes a client experience strategy successful when combined with RevOps, as well as other valuable insights.

Key points covered:

- Remove friction from the client journey map and internally with alignment.
- Ownership of the tech stack is crucial for meeting client expectations.
- The RevOps model and client experience strategy should be based on the belief that all clients are valuable.
- Improve client experience with employee satisfaction. RevOps helps both by boosting optimization.
- The importance of data in RevOps strategies also supports the client experience strategy with invaluable insights.
- Findings from client experience can feed back into shaping GTM.

We would like to take this opportunity to thank all the demand generation experts for participating and sharing their thoughts on how to deliver a great client experience. We wish them all success with their own RevOps and client experience strategy.

For more on what makes an impactful B2B lead generation and demand generation campaign, and how to build your own to reach your goals, read our latest [Insights](#) content.

We regularly publish insightful content covering a variety of topics, including building the digital experience, how to create and match content to the B2B buyer journey, as well as how to navigate the dark funnel, and more.

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