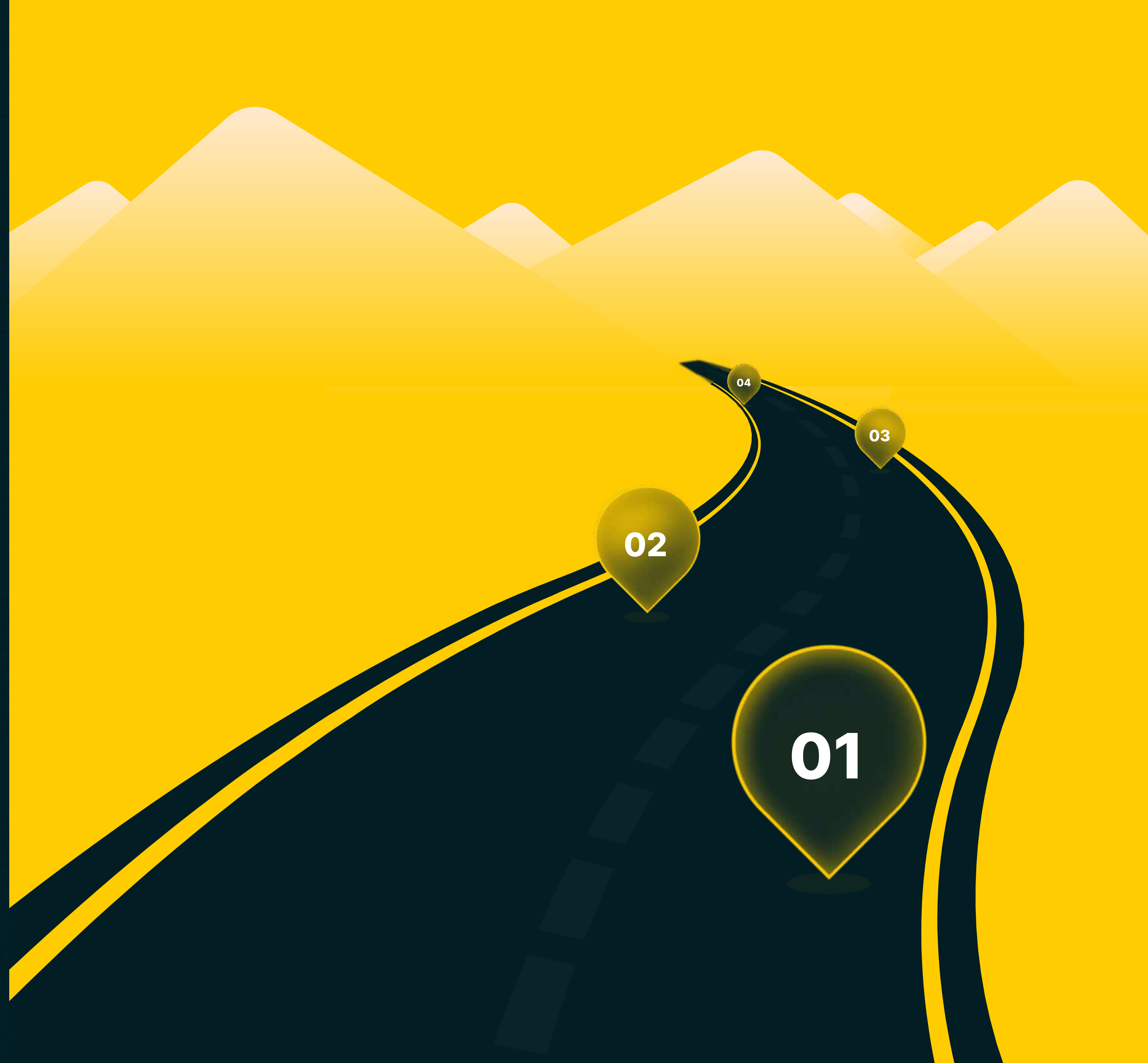


The Ultimate Guide to RevOps Roadmaps

Crowdsourced Insights from top Revenue Operations leaders to drive alignment and make your team more strategic - with Roadmaps

Nektar



Featuring Insights from :



BLAKE KENDRICK

Revenue Operations Manager @ Thankful



JEN IGARTUA

Chief Executive Officer @ Go Nimbly



ASIA CORBETT

Senior Revenue Operations Manager, GTM @ Bread Financial



ANASTASIIA VASIUTINA

Operations Manager @ Caroo
RevOps Specialist



JACKI LEAHY

Head of Revenue Operations at
@ Winning by Design



PRACHI GOYAL

GTM Strategy and Operations
Manager @ Nektar.ai



EDDIE REYNOLDS

CEO @ Union Square Consulting



MAHESH KUMAR

Senior Director - Revenue
Operations @ AppViewX



TYLER UTEG

VP of Revenue Operations at
@ Muck Rack



SHANTANU BASU

Senior Director, GTM Strategy
& Operations @ Tanium



JEN BERGREN

Sr. Operations Manager
@ Remotish



RYAN MURANO

Senior Director Revenue
System Strategy &
Operations @ Instructure



LORENA MORALES

Director of Global Digital
Marketing Revenue Operations
@ JILL



LEORE SPIRA

Head of Revenue operations at
@ Buildots



ABHIJEET VIJAYVERGIYA

Co-founder & CEO @ Nektar.ai



KUMAIL MUKADAM

Director, Revenue Operations
@ Claroty

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Discover

Goals

Strategy

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Design

Projects

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Sprints

Execute

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Monthly Cadence

Annual Planning

Executive Summary

What is a RevOps Roadmap?

A RevOps Roadmap is a high-level, strategic document that highlights your teams' upcoming projects with execution factors (timeline, owner), deliverables, and correlating KPIs.

It is a goal-oriented visual tool that communicates a clear scope of your focus areas and how they tie into revenue.

Executive Summary

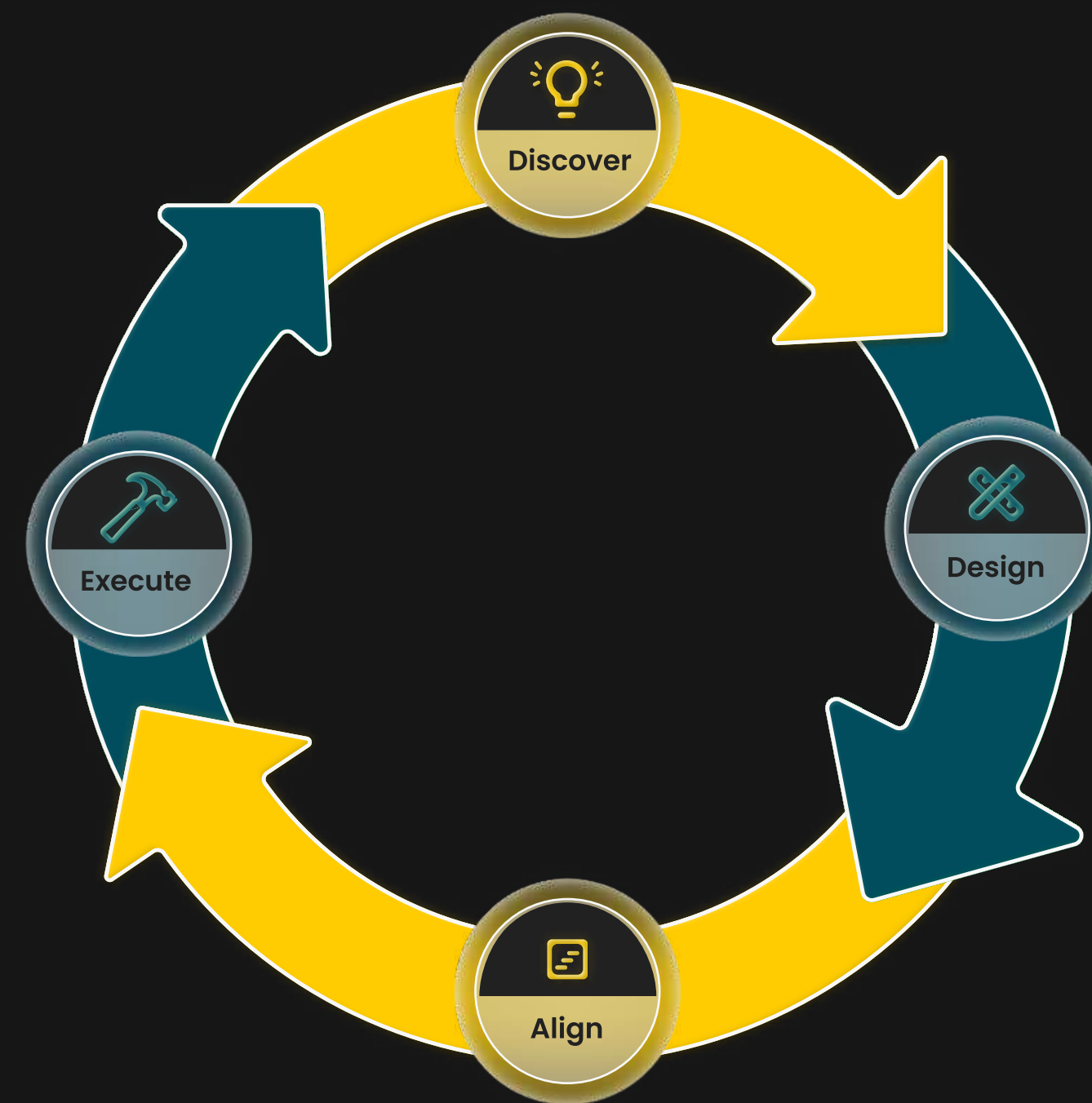
(Creating a RevOps Roadmap)

Step 1: Initial Analysis (Discover Phase)

The Discover phase gives you a clear idea of stakeholder expectations, current projects, and gaps in the customer journey. Since your roadmap takes all three factors into account, this analysis becomes the natural first step.

To begin with, you get all relevant functional stakeholders on the table and interview them to understand the current state of play. Find a list of questions for VP, Manager, and Executive level interviewees inside.

To identify gaps along your customer journey and systems, use proven methods like Rumsfeldian Knowledge Matrix and 3VC analysis, where it makes sense. Find the AMA with Go Nimbly on gap-analysis methods and best practices inside.



Step 2: Designing the Roadmap

The Discover Phase will give you all the required information to design your RevOps Roadmap. The roadmap looks different for all organizations based on their maturity and resource availability.

Components of the Roadmap: Every roadmap should include - Item / Project, Timeline, Milestones, Owner, Support Team, Theme and Definition of Done.

Start your roadmap design process by determining objectives and deliverables (refer to your research from the Discover Phase).

Before putting this on paper, prioritize projects using durability testing and 3VC. Assign a timeline to each project based on priority, effort level, interdependencies, and risks. Finally, delegate projects and underlying tasks to a relevant owner based on experience and area of expertise.

Executive Summary

Step 3: Alignment Leading up to the Roadmap

Aligning your strategy, processes, tools and getting stakeholder buy-ins is paramount to make your Roadmap a success. Find an effective checklist to align your organization leading up to Roadmap execution inside.

Step 4: Executing the Roadmap

To be valuable, your Roadmap needs to be a living document that's revisited and updated often - by stakeholders across all involved revenue teams. How you approach execution determines the adoption level and effectiveness of your Roadmap in the organization for years to come. Hold weekly progress meetings and quarterly reviews to keep the team aligned on one vision.

Without a Roadmap

- ❌ Teams lose touch with the company's vision, work on projects unaligned to larger business goals
- ❌ You fall prey to Shiny Object Syndrome and spend on redundant tools that don't move the revenue needle
- ❌ Teams face burnout with no proper support functions and constant unplanned tasks
- ❌ No clarity on how revenue teams' activities tie into revenue

With a Roadmap

- ✅ Teams work on projects with a direct correlation to larger business goals and revenue, aligned on a unified vision
- ✅ Tech requirements mapped out against upcoming projects quarters in advance for better expense projections and predictability
- ✅ All team members have a proper, pre-determined support function and know which project to work on at all times
- ✅ Org-wide visibility on how each project undertaken ties into revenue

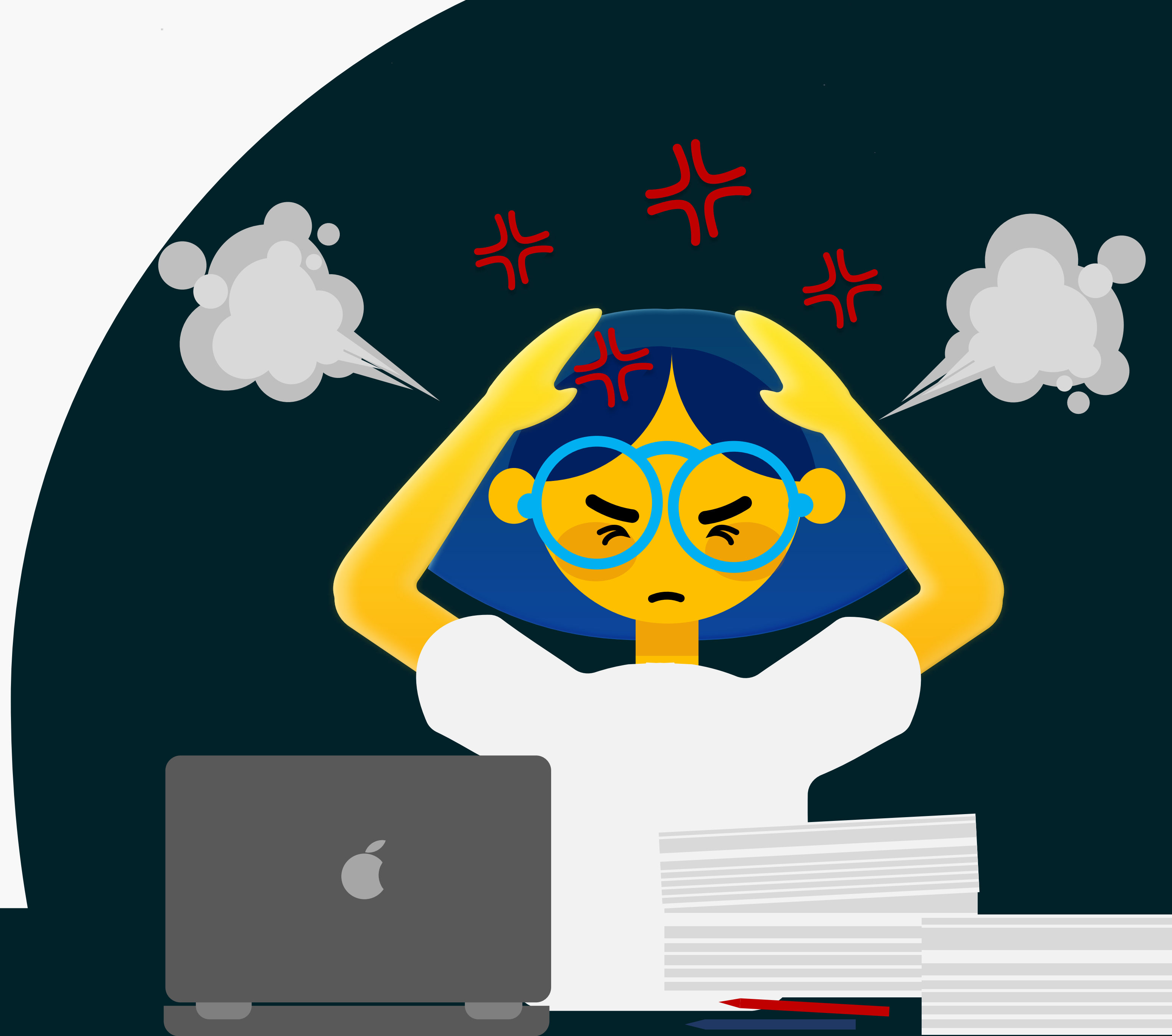
Introduction

Meet Katie, a distressed RevOps Lead trying to navigate confused teams, timelines going haywire and processes in disarray.

Weekly meetings with team managers were a brouhaha of unhinged requests from Marketing and Sales leaders running their teams like two different companies.

Reaching for her head in this siloed chaos, she said "Slack me all your inquiries." and sat down to trace every on-priority activity to their north star metric.

"We are in big trouble!"



RevOps Expo 2033



“Oh hey Katie, better late than never!”

She turned around to find a cheerful young man in what looked like RevOps Expo’s merch, already tapping away on his iPad.

“I’m Shane, your guide around the expo. We bring in guests from the early years of RevOps to get a peek into the latest and greatest strategies. You’re one of the *Time Trotters* of this batch.”

“NOW! In my records, I see you’re struggling with

- ▶ **Prioritization issues**
- ▶ **Confused and siloed teams**
- ▶ **Unnecessary tools in the stack**
- ▶ **Scattered data across tools**
- ▶ **Stakeholders, rocky timelines**

and.....my oh my

No clear scope of how it all ties into revenue.”

Eyes widening with everything Shane just listed, Katie yelled out “Yes, those exactly!”



RevOps Expo 2033



In a fix over the hundred hitches to smoothen out, Katie took the turn to her home's lane and tumbled into what looked like a different dimension.

Katie found herself standing outside a huge building that read in large block letters "The Global RevOps Expo 2033" - around were chirpy people donning "RevOps Rocks" caps.



RevOps Expo 2033

“You’re the perfect audience for our Roadmap for the Doomed guided tour. It’ll set things straight for good! Follow me”

They pushed through a wooden door that said ‘A goal without a plan is just a wish’ to find a neat group of RevOps Professionals talking among themselves:

“*We were so focused on vanity wins that didn’t move the bottom line!*”

“*Ditto. It’s like I’m fighting a hundred fires with no idea if any of it helps move the revenue needle.*”

“*I got all stakeholders together to focus on activities that really impacted the company’s growth. It’s given me so much sanity and ammo to push-back when off-plan requests come in.*”

“*A simple roadmap would get you out of pretty much all those binds.*”

ROADMAP FOR THE DOOMED
‘A goal without a plan is just a wish.’



Your team should be operationalizing strategies and delivering outcomes - not fixing bugs and reporting numbers.



Without a roadmap, your path to success is fraught with dangers, and you do not have a clear sense of direction and can make a wrong turn or fail to reach your destination.

– Mark Hudson



RevOps professionals tell me their “hair is on fire” trying to deal with all the inbound requests from the business. Creating a strategic roadmap can shift the ratio of proactive to reactive projects from 10/90 to 70/30

– Tim Clarke

The Quizzes and Caveats



Mulling over their arguments, Katie moved along in the tour to find a room apparently called

'Pass this before you bounce to the spreadsheet.'

a holographic quiz sprung up a bit too close to her face

- ▶ Choose what a RevOps roadmap is NOT:
- ▶ A list of projects you want to complete
- ▶ A document you create and never update again
- ▶ A set-in-stone plan
- ▶ Optional

All of the above

It most likely is optional? She thought, and tapped on the then-obvious Option B.

ERR! The room turned red, she had picked the wrong answer.

Turns out, "All of the above" was the right one.

What RevOps Roadmap is NOT:

- A A list of projects you want to complete
- B A document you create and never update again
- C A set-in-stone plan
- D Optional
- E All the above



It is important to note that this is not a project plan, which is great to have, but provides a more granular view of tasks and resources. The roadmap outlines the top-level strategy, direction and timelines.



Five Things to Consider

Shrugging off the small loss, she turned to an elevated stage where Josh, RevOps Lead at Hooli, talked about some core roadmap attributes

“Roadmaps are pretty easy to understand, there are about five things to be super mindful of when you design one.”, he said as a list sprung up on the left

“The caveat for this is your organization MUST use a goal framework or you need to know what your org's goals are to align your roadmap to them. It's going to be nearly impossible to create and use a roadmap if you don't know what the company's goals are.”



ASIA CORBETT

Senior Revenue Operations
Manager, GTM @ Bread Financial



Simple -

Roadmaps are simple and visual. Limit yourself to one slide /excel tab for each team.

Easy to Communicate -

Roadmaps show your revenue engine's critical elements in a straightforward way.

Collaborative -

Your roadmap describes owners from Sales, Marketing, Customer Success, Product, Finance, HR & Legal teams. They **MUST** collaborate to make it a success.

Goal Orientated -

A roadmap is specific, not descriptive. They outline critical activities and deliverables.

Strategic -

A roadmap clearly scopes out your focus areas, strategy and correlating deliverables.

Discover - State of Play

Through the next door, Katie was to be a part of a large roundtable of casually dressed execs.

She quietly grabbed a seat and tuned in.

“That’s what I mean - understanding the state of play before you design the roadmap is paramount. Any strategic work worth its salt takes a thorough understanding of the problem space you’re operating in”

A passionate RevOps Exec sitting across from Katie explained.

“I agree - the Roadmap starts and ends with a growth mindset after all - it focuses on closing gaps along the customer journey. How would we do that without a clear idea and analysis of those gaps?”

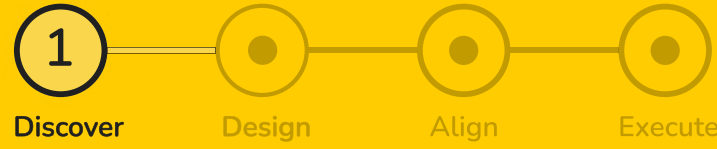
said another participant in support.

The arguments sat well with Katie - but where to even start?



“So I use the bow-tie model and the first step is mapping the process, systems, handoff points, and key milestones across the bow-tie and leveraging that structure to have a data model and KPIs across each milestone to identify gaps etc.”

KUMAIL MUKADAM
Director, Revenue Operations @Claroty



Discover Handbook

Before she knew it, a small handbook of sorts swept across the smooth table to her side. It read -

This handbook walks you through the crucial pre-requisites of Roadmap Design. Use it wisely.

What does the process entail?

- ▶ Bring all the stakeholders to the table
- ▶ Start by interviewing
- ▶ Audit the current customer journey and systems

The roadmap is the biggest alignment tool for Revops. It has a lot of moving parts that impact various functions across the organization. Identifying the key stakeholders and mapping their impact is crucial to kick off the Discover phase.

Product Ops

Product Operations

Tactical support in case of PLG teams



The roadmaps will require executives, sales, marketing, and customer success as part of the revenue team. And will also include your product team, finance, H.R., and legal. Remember that the roadmap describes multiple work streams and owners. For your roadmap to be valuable, teams MUST collaborate to achieve the goals and objectives.

Mark Hudson

Start with Interviewing

A helpful roundtable participant with the placard - 'Blake Kendrick, Revenue Operations Manager at Thankful' handed Kate some sample interview questions to to put things in perspective.

▶ Sales VP/Director-Level

- Are we missing/meeting/exceeding goals for revenue at our target accounts?
- What differences exist in revenues between products?
- What differences exist in revenues between market segments?
- How long does it take to realize revenue upon enrolling a target into the program?
- What can we expect revenue to look like for the next month/quarter/year?



Objective :

Steward of
Production/Revenue

Sales Interview Questions

▶ Manager-Level

- What are our program success rates, from an overall performance perspective?
- Based on our known success rates, how many targets should we be reaching if we want to hit goals?
- Is improvement needed in resourcing (i.e. more staff)?
- Is improvement needed in targeting/assignment methods (i.e. restructuring targets to better support coverage)?
- Is improvement needed in success rates (i.e. shifts in tactics like messaging and content, outreach channels, etc.)?



Objective :

Steward of Program Coverage/Efficiency

Execution Team Leaders

▶ Manager-Level

- Which of our team members is seeing the most success?
- What tactics are our most successful team members using?
- What behaviors are our most successful team members demonstrating? Can they be replicated by other team members?
- Which target segments seem to be the most responsive?
- Which target segments seem to be demonstrating the highest level of urgency? Is there any reason motivating that urgency?
- Of our templated/automated tactics, which are performing best?



Objective :

Steward of Program Coverage/Efficiency

Execution Team

▶ Accountable contributor for activity performed

- Am I employing the best-known tactics when I'm conducting outreach?
- Am I meeting my quotas for activity?
- Am I setting a next action anytime I complete an activity?
- Do I have a clear idea of "what to work on next?"
- What feedback am I observing from prospects?
- Are my activities generating responses? Meetings?
- How often are prospects being disqualified, or how often do I have to "move on" because they're unresponsive?



Objective :

Accountable
Contributor for Activity
Performed

Marketing

▶ VP/Director-level:

- Are we maintaining optimal ROI across campaigns?
- Which channels are yielding the greatest ROI, measured based on customer wins?
- What's our tolerance for spend as an organization? Are we over/under-spending today?
- Are we leaving any channels unexplored? If so, are they unutilized because we've proven they're ineffective, or because we haven't tried them yet?



Objective :

Accountable
Contributor for Activity
Performed

Marketing

▶ Manager-level

- What are the optimal budgets per channel, based on our success rates and required production from inbound to hit targets?
- What are our success rates per channel? Are they falling within an expected/healthy range?
- What is the quality of inbound-attributed conversions?
- How long does it take for inbound-attributed conversions to result in the outcome of a sale (meeting, opp, win)?



Objective :

Accountable
Contributor for Activity
Performed

Marketing

► Specialist-level

- What content is working best within a given channel?
- How are we diversifying content to best capture key personas? To best capture differences in buyer readiness?
- How are we cutting out content that is capturing unqualified conversions?
- Are we seeing increases in success rates due to testing/experiments, or are we successfully maintaining success rates where we're achieving the desired production?
- Are there opportunities to scale efforts that are productive? If so, do we have a plan and timeline in place to achieve "scale?" What do projections look like in a scaled environment?



Objective :

Accountable contributor for Activity performed

Katie is asked to write her interview questions :

Area

Stakeholders

Objective

Question

People

System

Process

Team's Pain Point

Discover Stage Checklist :

Identify Stakeholders

Prepare Interview Questions

Review Company's Objectives

Conduct Necessary Audits

Document Everything

Katie looks up from the handbook and asks, “Any applicable frameworks for the Discover phase?”

“Head over to the Go Nimbly AMA, heard they’ll talk about their gap-analysis process. Better hurry though, it’s four doors away!”, a helpful participant says.



“I’ve found it’s equally helpful to begin immediately taking ownership of all tech that makes sense under the RevOps umbrella. This helps paint a codified understanding of the components that make up the revenue tech stack and places ownership in the right functions.”

Tyler Uteg

Vice President of Revenue Operations, Muck Rack



“I almost always begin with interviews with department leaders to understand current objectives and priorities, followed by systems-level data audits (CRM, etc.) to see how production is being measured and reported”

Blake Kendrick

Revenue Operations Manager @ Thankful



“For discovery, I look at the GTM motions for the business, then talk through / lay-out the GTM operations processes, followed by where the inefficiencies are and what tools/systems we have or can have improve to ease the process to better align with the desired motion”

Shantanu Basu

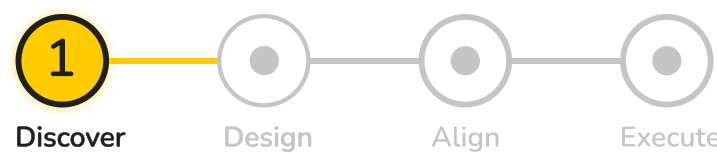
Senior Director, GTM Strategy & Operations @ Tanium



“Auditing the current customer journey is a good place to start with research for the roadmap, so you can identify the most impactful projects to improve customer experience, revenue, and other business goals when you create your RevOps department roadmap

Jen Bergren

Senior Operations Manager @ Remotish



More on Discover

Making it just in time for the good part, Katie found herself a seat, ready to make notes.

“For those just joining, we are talking all things gap-analysis across customer journey and systems in this hour. Let’s see what we have here!” said the host with the nametag ‘Jen Igartua, CEO @ Go Nimble



Towards
AMA with Go Nimble →

AMA with Go Nimbly

When interviewing stakeholders, what are the questions you generally ask and the objectives behind them?

“When coming up with a list of gaps to address with the roadmap, we interview everyone on the revenue team to understand how they see the customer journey and where blind spots exist.”, Jen explained.

“The questions we ask are aimed at determining whether the organization is approaching strategy holistically and if there are still significant knowledge gaps across the team.”

Do they have a clear understanding of what each team is working on and why?

In its current state, how does the team determine what work to do?

Looking back on their last big operations initiatives, can each one be mapped back to a gap being felt by the customer?

Does the team have a shared understanding of what the company’s north star is and what goals/values drive decision-making?



“Onto the next one!” Jen said excitedly. →



AMA with Go Nimbly

 How does Go Nimbly do Gap analysis ?

“ We have a few different methods for identifying, validating, and analyzing gaps. We utilize the Rumsfeldian Knowledge Matrix, which categorizes gaps into one of four categories.

All eyes moved to the screen as those four categories showed up.

From there, we go on to design and perform durability tests or validate through 3VC analysis - which we'll get to talk about very soon!

”

“Pretty straightforward start”

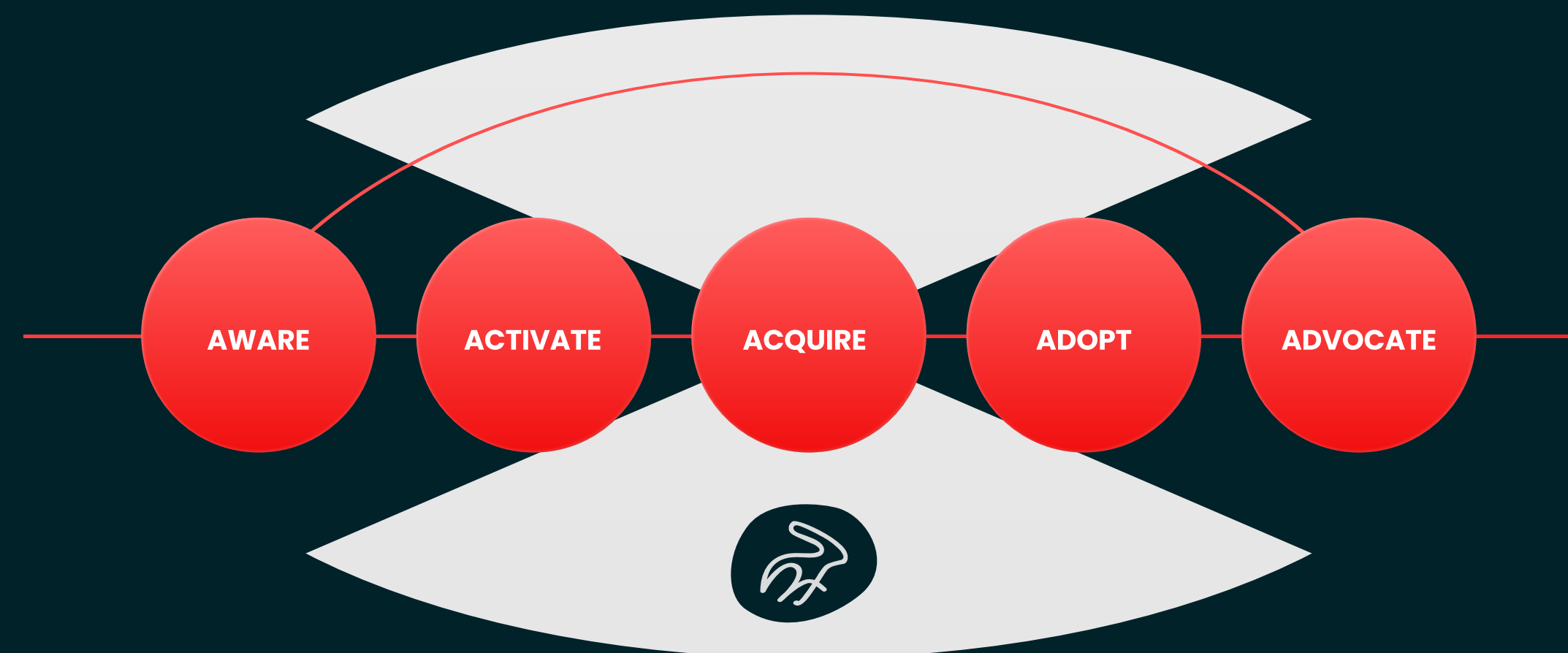


	Unknown	Known
Known	<p>Hypothesis</p> <p>We know there are things we can't predict.</p> <p>Establish a test and perform durability test to validate it (or not)</p>	<p>Facts</p> <p>Things we aren't certain of.</p> <p>Ready to prioritise based on revenue impact and plan on your roadmap.</p>
Unknown	<p>Exploration</p> <p>We don't know what we can't predict.</p> <p>Experiment more and these will become known unknowns.</p>	<p>Intuition</p> <p>Other's know but you don't.</p> <p>Validate these with 3VC analysis, then determine the cause.</p>

AMA with Go Nimbly

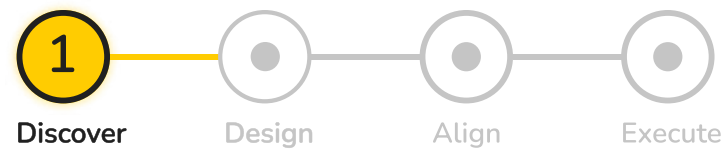
How does Go Nimbly do a Customer Journey Audit?

“With our customers, we run a workshop called Silo No More to map the customer journey and identify gaps that we can then take into our road mapping sessions.”



“First, we define each funnel stage by giving them names focused on buyer behavior, rather than the internal functions of the seller - and establishing exit criteria. It’s important to make it very clear what actions we want the buyer to take at each stage to push them to the next one.”

‘We talk to the stakeholders to find out where friction exists for them or where they think there might be gaps. We call these intuition-based gaps. Then we talk to their customers to get their perspective and validate the team’s intuition..or not’, Jen shrugged.



Go Nimbly AMA

💡 How does the 3VC process work?

“3VC stands for Volume, Velocity, Value, and Conversion impact revenue for an organization and we can measure them based on pipeline data and health.

We have a tool we developed to analyze CRM data and take snapshots of the pipeline each month.”

“Oh look here! We have questions from the audience.” someone on the stage said. They immediately had Katie’s attention - she asked Jen to expand on a concept mentioned earlier.

“Interesting one - How does the durability testing process work?”

“Well Katie,

“There are lots of types of durability tests. Some of the ones we run most often with our customers are Competitive Analysis, GTM Ride-alongs, Customer Experience Mapping and Conversation Intelligence - each with its unique process.”



Competitive Analysis

- ▶ Start with a known gap or a step in the buyer journey you want to analyze
- ▶ Compare the experience delivered by your competitors in the industry

Conversation Intelligence

- Use conversations between your team and buyers/ customers to identify trends at a given funnel stage
- This could be through emails or recorded calls or using tools like Drift or Chorus.ai
- Use advanced analytics features in CI tools to narrow down specific keywords or situations

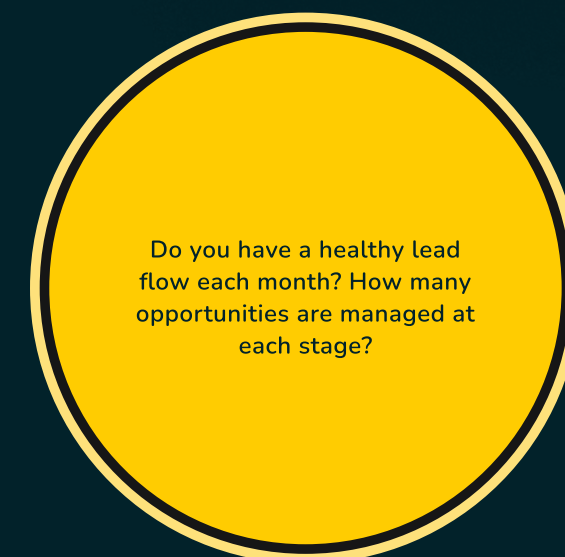
GTM Ride-Alongs

- ▶ Start with a hypothesis
- ▶ Have a standardized list of questions
- ▶ Shadow 5+ people as they go through the process you want to test
- ▶ Identify trends that prove or disprove your hypothesis

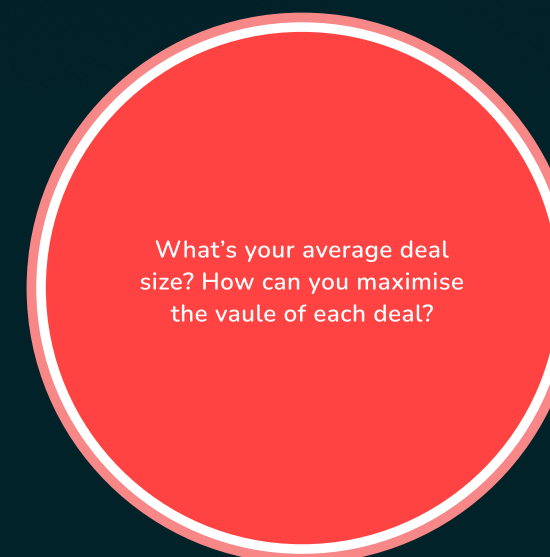
Customer Experience Mapping

- Go through your buying process as if you were a customer to identify sources of friction
- This is easiest for self-serve products
- Interview your existing customers about their experience
- Offer customers an incentive to document their experience

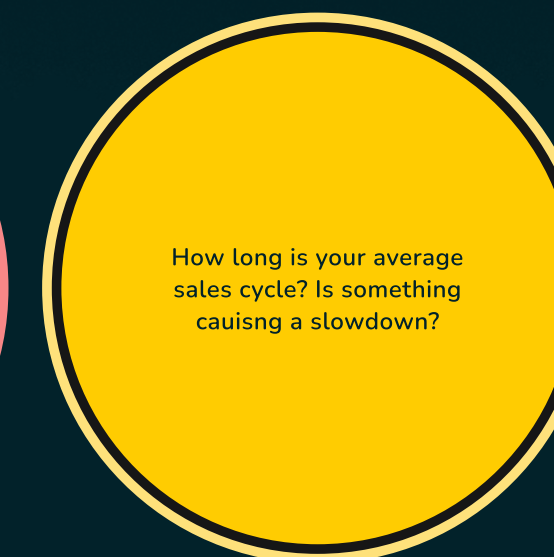
VOLUME



VALUE



VELOCITY



CONVERSION



The Roadmap Design Rail



Soon the AMA disbursed and Katie walked out of the exit into a little railway station by the name “RevOps Express”

"All trotters to compartment B!"

Grabbing a seat with fellow Trotters, she grabbed a two-pager that read:

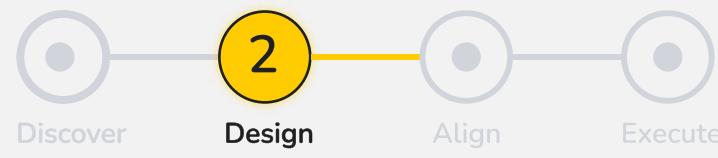
“Welcome! Here's what the tour entails:

Objectives and Deliverables - What will the roadmap accomplish, how do you figure that out?

Timeline - How much time should your Roadmap items take?

Delegate - Who should do this, with whose help?





The Roadmap Design Rail

Soon the train came to a crashing halt - tussling her way out, Kate found a group huddled around a speaker who said:

“What should your Roadmap include? Here is a baseline set of must-have components to help you get started. To put this in perspective, download the RevOps Roadmap template from [Asia Corbett, Senior Revenue Operations Manager, GTM @ Bread Financial](#)”

- ▶ **Project:** Strategic undertakings your teams will carry out to achieve a certain revenue outcome
- ▶ **Business Impact:** How any given project benefits the organization
- ▶ **Priority:** Rate your projects in a sequential order of priority to focus on the ones that deliver the highest business value
- ▶ **Ship Date:** A well-estimated release date agreed upon by all involved stakeholders
- ▶ **Stakeholders:** Teams involved in execution of any given project



Before you put this rail's insights in action, remember: The RevOps roadmap looks different for all organizations based on their maturity and resource availability.

Projects	Business Impact	Priority	Ship Date	Stakeholders
Processing Pipeline	Employing governance around chat bot tool to increase effectiveness of engaging prospects on the website. Also impacting the user experience of customers when using the app in product.			
Website Resources Audit	Current and relevant content that is linked appropriately to workflows is a critical to marketing programs effectiveness in creating awareness around experience marketing and Postal.			
Marketing Dashboard	Help leadership use data to make better decisions and understand marketing programs and efforts			
Revamp lead lifecycle and statuses	Streamline processes, clearly defined expectations and rules of engagement so there is less confusion over ownership of leads and hand off between marketing and sales allowing for better collaboration throughout the funnel.			

[Download RevOps Roadmap Template](#)

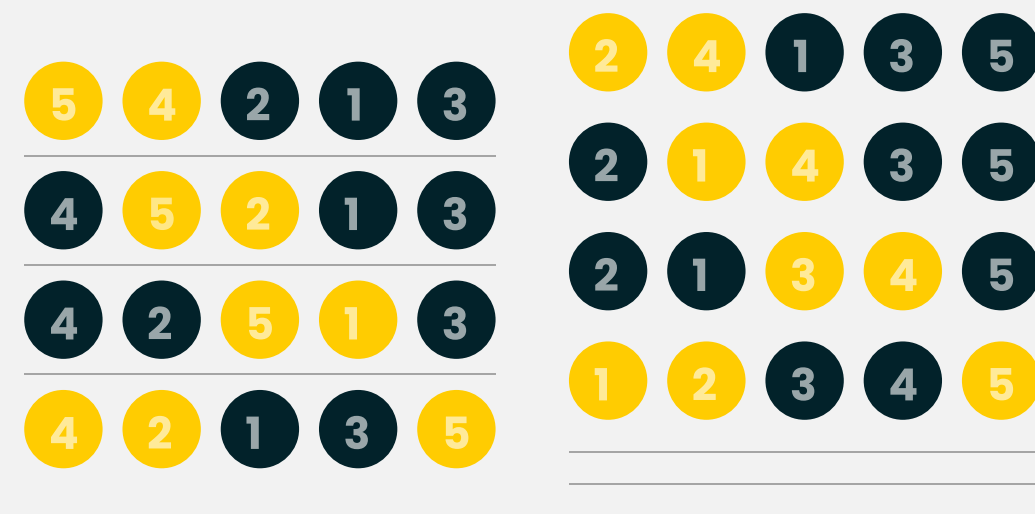


The Roadmap Design Rail

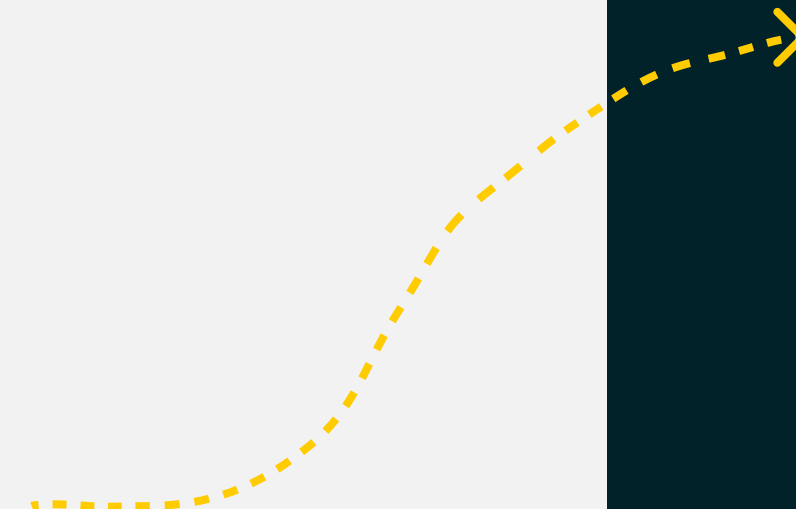
This list doesn't necessarily represent the industry standard. Based on the complexity of your organization, you might want to add more components to provide better context.

As an example, here are the components Go Nimbly finds itself adding in their clients' roadmaps often:

How to prioritize your Roadmap projects?



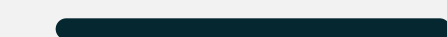
- Take a gap-first approach. Make sure every item on the roadmap can be mapped back to a gap being felt by your customers.
- Identify those customer journey gaps with durability testing and 3VC analysis (Refer to your Discover phase research)
- Once you have a list of gaps and understand their impact, use the Bubble Sorting Method to set all your projects in an order of priority



Component	Definition
Items	Roadmap items should be consistent in their leveling. Don't turn your roadmap into a task list; make sure each item can be mapped back to a strategic driver.
Definition of Done	There should be a clear definition of done for each item, as many big initiatives are iterative. In order to mark an item as 'complete' what needs to happen? This helps create accountability and maintain alignment.
Owner	Who is responsible for driving the item forward?
Support Team	Who can the owner lean on to support the execution of the item? What does 'support' for each item look like?
Milestones	Who can the owner lean on to support the execution of the item? What does 'support' for each item look like? Break your roadmap items into smaller milestones to help provide clarity on pacing and progress.
Timeline	Break your roadmap down by quarter so it's more manageable and can evolve as things change.



Objectives



“So Katie - before you get busy designing, it’s important to map out objectives, both short and long term across all revenue teams. Keep your insights from the Discover phase interviews handy!”, said Abbey, Katie’s assigned expert for the design steps.

“They tell you what the stakeholders and functional leaders value, great resource to inform your objective mapping”

“Keep in mind though - Every organization stacks differently in terms of maturity of their processes and systems. Objectives depend on your unique priorities”, she went on

A bit mixed up about something, Kate asked “When you say Objectives, what does that really mean in this context?”

“Yes, objectives can be defined as quick wins/cross-functional projects and longer-term strategic initiatives/ planning.

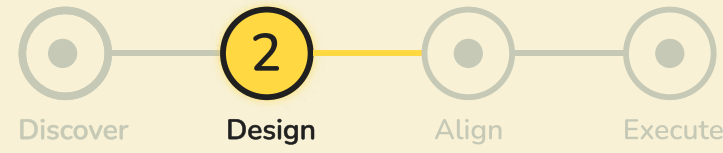
For example, a quick win that could be accomplished in the span of a quarter could be something like: define Sales and CS KPIs to ensure a consistent approach across the team.

A longer term, more strategic focus may be on assessing the current CRM to make a case for transitioning to a new one for growing needs. This of course, will take much longer. It's important to not sacrifice short-term gains for the longer vision, both are important.”

“Looking at your overall business goals helps you decide objectives and projects that tie directly into them - start there”

Taking the information in, Katie thought of her own org’s possible RevOps objectives.





Timelines

“Once you have the objectives and deliverables mapped out, start attaching well-defined timelines to them.”

Abbey explained

“Like any task without a due date, any campaign without its runtime - your roadmap is pretty much bound to fail without a solid timeline attached to every project - **one that sits well with all involved stakeholders**”

Katie found herself in a crunch over timelines every other day, this piece of information could be her way out, ‘How do you decide the timelines?’

‘Estimate the work that goes into each project accurately.’

‘When planning items on your roadmap, you should assign each of them a priority - P1, P2, P3 - and an effort level - S, M, L. This help you determine a timeline.

Katie fiddled through the booklet nodding, as Abbey continued”

“It’s also important to talk about possible risks and interdependencies that may derail things. Make sure to break each roadmap item into smaller, time-bound milestones that your teams can work towards.”



Delegate

'Let me ask you something' Abbey said, 'If an important Campaign Strategy was one of the projects in your Roadmap, who would you assign it to?'

'The demand gen specialists?' Kate said after some thought

Abbey shook her head, 'No, but I get where you're coming from. The right person to carry out a campaign strategy would be the department heads managing marketing ICs'

'Which brings me to our last lesson - Delegation should be based on experience and area of expertise.' Abbey explained

'For example, it makes the most sense to delegate tasks for analyzing, defining, and strategizing marketing-related efforts to a marketing leader.

The department heads are typically best suited to carry out a strategy and set policies by ideation.

They'll also communicate with the ICs to get the projects completed within the determined timeframe'

'Makes sense' Kate said 'Though how do keep teams from losing vision and falling into old patterns?'

'Have a RevOps team member looking over each team's progress as they work through the roadmap projects.' Abbey said

'They can be the neutral observer of progress between teams. You can also recognize how to bring disparate efforts back into alignment this way.'

'And that's about it! We've talked about how to set objectives, timelines and delegate to make your Roadmap work for the org' Abbey said with a big smile, 'I'll let you go now, that door there will take you right to the tour exit. Good luck with your roadmap Kate!'



Design Stage Checklist :

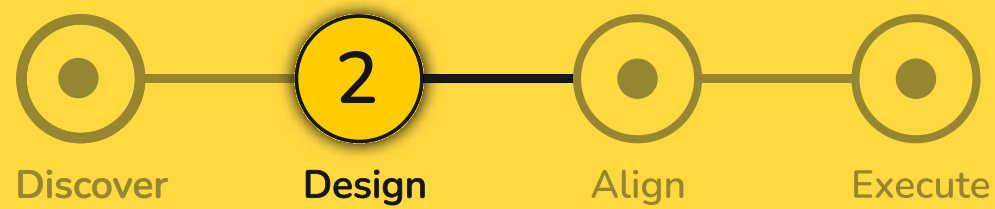
Determine Projects

Map Businesss Impact

Determine Timelines

Prioritise Projects

Delegate



Objectives should be aligned with the overall business goals, less so the individual marketing, sales, and customer team goals, otherwise that would put RevOps in too much of a support role and would not be strategic and unbiased enough to equally support all revenue teams. RevOps should report to the person above all those teams, often a CRO or COO, they should not report to each individual team (marketing, sales, success/service).

Jen Bergen

Sr. Operations Manager @ Remotish



RevOps projects should be aligned to business objectives. This makes it easier to assign priority and communicate the impact of the project. It's important to have a project plan outline of key milestones for the roadmap's deliverables. Break each milestone down into tactical pieces for execution.

Ryan Munaro

Senior Director Revenue System Strategy & Operations @ Instructure



After assessing the entire ecosystem, add ranking against priority and potential impact. If we uncover a miss when it comes to contact phone numbers, and we've determined improving that would raise our connect rate (and we have a frothy connect to meeting booked rate) - I'll capture our baseline metric (perhaps % of 'Bad Data' call disposition), set a goal of improvement, and then start solving for the delta.

Jacki Leahy

Head of Revenue Operations @ Winning by Design



Prioritise objectives depending on impact to revenue or the team. If it doesn't impact one of those then it doesn't get prioritized. I.e fix lead management.

Lorena Morales

Director of Global Digital Marketing Revenue Operations @ JILL



Alignment

All set to design her roadmap, Katie made her last stop at the Alignment discussion.

A speaker in the expo's merch started:

“One of the biggest enemies of new tools and processes is a lack of buy-in.

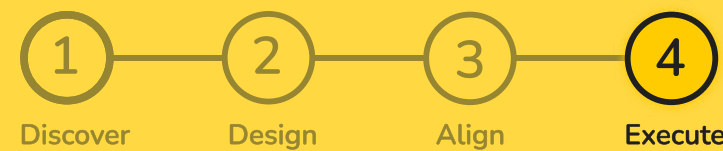
As operators, we can't just earn one stakeholder's trust and call it a day; we have to present a plan that will not only work but that is also extremely shareable and can stand up on its own even when it's taken out of the room.”

“A visual asset that's approachable and, well, pretty.” It said matter-of-factly

“That's what every roadmap has to ultimately become: something your team can get excited about—a statement of intent all about how you plan to improve their experience over the next twelve months.”

”





Execute

How you execute determines if your roadmap becomes:

An effective reference document that keeps all teams focused on revenue-generating projects

OR

A dumping ground for all your inbound requests with no head or tail, abandoned by all teams a few weeks after its implementation

Your roadmap has to be regularly updated and followed by all involved stakeholders to be effective.

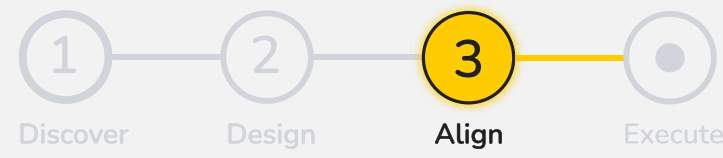
Here's a handy checklist to execute your roadmap well:



Always schedule time to review the roadmap on your own and then to review it with key stakeholders.

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Alignment

The Trotters nodded along.

“You’re preparing for a major organizational transformation, the effects will ripple across teams, processes, tech, strategy and more. Unless each involved party is bought in and sees the roadmap’s value, setting it up for success will be a real pickle.”

”Here is a checklist of what you want to cover to get the organization aligned --”

Worried over what’s to come, Katie wondered if she could get her teams out of their polar-opposite Salesforce dashboards long enough to make a case for this?

“Not too bad for a Friday”, she thought, headed out of the tour, back to the same lane that brought her to her adventure.

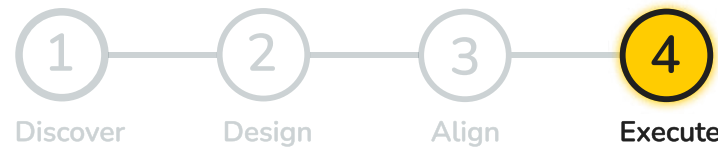
Alignment Checklist

Strategy	A defined set of operating principles that ensure planning, process, systems data, and KPIs are aligned across marketing, sales, and customer success.	<input type="checkbox"/>
People	Alignment of the revenue teams around a single view of your business with each team’s participation in the revenue goals.	<input type="checkbox"/>
Process	The design, management, and tracking of cradle to grave revenue processes, including the automated and manual processes needed to blend the multiple connected revenue processes.	<input type="checkbox"/>
Data	What data sources will you use, and what is the quality of the data needed to manage and optimize end-to-end revenue processes.	<input type="checkbox"/>
Analysis	The agreed-upon activities and KPIs that you will use to monitor and measure your success or setbacks across the revenue lifecycle.	<input type="checkbox"/>
Technology	A defined set of operating principles that ensure planning, process, systems data, and KPIs are aligned across marketing, sales, and customer success.	<input type="checkbox"/>



RevOps is equally responsible for the success of the revenue teams and making them achieve the goals. RevOps needs to move from being a support to strategic function. With all the data and insights, RevOps needs to provide strategic inputs to the functional leaders and partner with them to make them achieve goals. Essentially for this to happen, RevOps needs to be more of a strategic partner and this is huge shift in the mindset for both RevOps and Functional teams.

Mahesh Kumar, Senior Director, Revenue Operations @ AppViewX



Execute

Keeping Your Roadmap Fresh:

Update your roadmap in accordance to any changes as project ship dates close in for accurate, company-wide visibility

Quarterly Strategy Meeting: Put a quarterly roadmap meeting on all stakeholders' calendars to retro the process and plan projects for the coming quarter.

Execute Better with a Tool: A project management tool can help you carry out different execution cadences and manage the roadmap better

Bi-weekly Utility Meetings: Get your revenue teams together to revisit the roadmap and update them on org-wide progress. This makes sure all unresolved questions come to the forefront and no one loses sight of objectives

Execute Checklist

Roadmap Check-in Cadence

Roadmap Update Cadence

Quarterly Review Cadence

PM Tool to Manage the Roadmap

Ready to Start Roadmapping?

That was quite a long journey! Here's a quick & actionable panorama to help hit the ground running:

- Discover** - Get a clear idea of your company's current standing. To do this, identify all important stakeholders in your revenue teams. Interview them to understand priorities, planned activities and metrics. Audit your internal systems and customer journey to identify revenue engine gaps that your roadmap needs to address.
- Design** - To start off, draw out objectives and deliverables based on discover stage insight and make sure they trace back to business goals clearly. Five components that will make up for roadmap are project, its business impact, order of priority, ship date and involved stakeholders. Estimate the work involved in each roadmap project, attach a timeline accordingly. Delegate each project to team members based on experience level and area of expertise.
- Align** - Without buy-in across the board, your roadmap will likely not be followed as well as you'd like. Align all stakeholders and teams on strategy, people, processes, data, analysis (activities & KPIs) and technology.
- Execute** - Hold bi-weekly utility meetings to keep teams updated on their progress and quarterly strategy meetings to plan projects for the quarter ahead. Keep the roadmap updated and put a project management tool in place to facilitate better execution.

Here's what the roadmapping timeline looks like for Blake, Revenue Operations Manager @ Thankful

Stage	Task	Timeline
Discover	Company goal-setting	2 to 4 weeks (Subject to how efficiently RevOps audits historical data and how well its already organized).
Design	Defining functional responsibilities	4 to 6 weeks, (Subject to the organization's maturity and departmental complexity).
Design	Defining processes for functions	8 to 24 weeks (Subject to the breadth of roles that need definitions).
Design	Hiring to fill functional gaps	4 to 8 weeks (Subject to the positions' seniority and the capacity of the HR team).
Align	Deployment of tech tools	8 to 10 weeks per platform to achieve a state of full and successful adoption by end-users.
Execute	Setting up a task communication cadence	Every week/month/quarter (Subject to the scope of the projects).

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