The 2021 RevOps Cookbook

Brought To You By Aptitude 8

Welcome to the RevOps Cookbook

As a RevOps practitioner I am always asked what I would recommend or how I would solve a specific problem with a set of tools. As a lover of food, it reminds me of asking a chef what they would recommend and being delighted when they pull something out of the back room that pairs beautifully with the dish I just ordered. I realized that while I had some cool ideas, the real inspiration should be the leaders, the "chefs" if you will, out in the field cooking up wild ideas every day and testing new recipes.

RevOps is all about how systems connect and processes drive seamless handoffs between teams. A great RevOps solution, or a recipe in our case, encompasses multiple technologies and each approach is unique. This cookbook showcases practical ideas and strategies from the industry's leading RevOps Professionals.

Our goal is for you to be able to implement as many of these recipes as are relevant to your business and team, or perhaps be inspired by some of what our chefs have put together to come up with your own riff on a classic. Each Chef that's participated in this cookbook has years of relevant experience in the RevOps space and is a leader at their respective company.

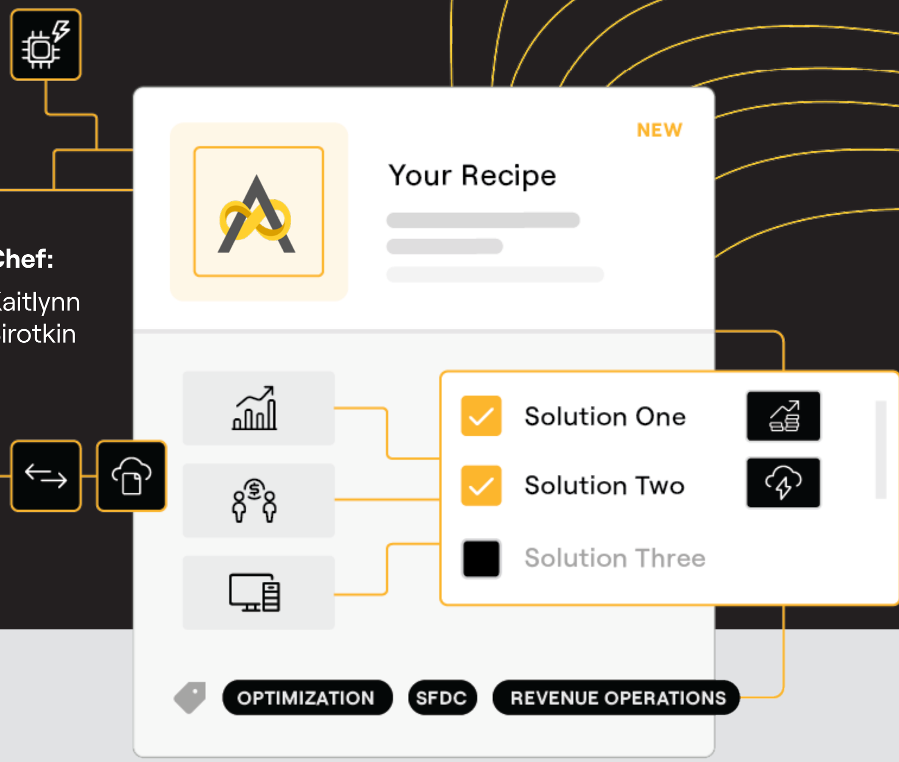
You may also notice that we've chosen to highlight companies whose technology might make sense for your RevOps tech stack, and that's no coincidence. Should you be interested in learning more about a particular technology and how it might fit into your next great recipe, this cookbook is a great way to get inspired and get in touch.

Happy cooking!

Connor Jeffers

How to Automate Outbound Sales

Chef: Kaitlynn Sirotkin



Company: Aptitude 8

Introduction:

Sales reps have enough on their plate. From making phone calls, conducting meetings, nurturing relationships and professional schmoozing. How are they are expected to keep up with all of their email outreach?

With a constant need to build their pipeline, it's necessary to automate their outbound sales efforts.

What You'll Need:

- A sales team
- Outreach.io
- Killer content
- A phone
- Social Media

Steps to Success

First, you will need a seasoned sales rep that is ready to take on the task of being a guinea pig. This next step is the most important, so make sure you measure appropriately. You will need to either purchase Outreach.io or have an existing Outreach.io instance. *This part is crucial.*

If you have an in-house marketing team, ask them to whip up some sales emails & collateral for you. You'll want it to be light hearted, so make sure you don't make it too dense.

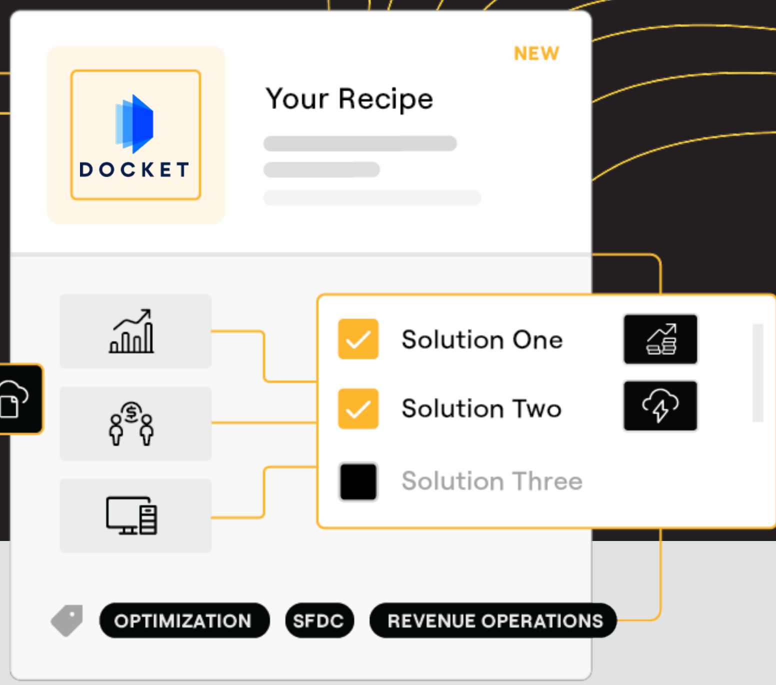
Once you have your content baked, you're going to load it into Outreach.io for sending along with some phone call tasks & LinkedIn activities. Make sure you personalize your touchpoints. Nothing is worse than bitter interactions!

Now that you have your process, the rest is icing on the cake. Make sure you're keeping an eye on your open & click rates, prospect interactions and meetings booked. Once you hit your sweet spot, it will be easy as pie.

APTITUDE 8

How to Streamline Productive Meetings

Chef:
Heather Hansson
Dir. of Product



Company: Docket

Introduction:

Maintaining alignment is critical for a well-functioning sales process. Keeping your sales team on the same page, and setting clear expectations for prospects and customers is guaranteed to lead to stronger, long-term relationships. Having a superior product or service can be greatly overshadowed if a prospect or customer feels like they did not gain any value after meeting with one of your reps.

Often times, this isn't due to lack of trying from your sales reps. It is often a byproduct of unsupported sales reps that then brews client dissatisfaction and a lack of confidence in your team. With Docket, organizations can ensure professionalism, clarity, and consistency to every client engagement end-to-end.

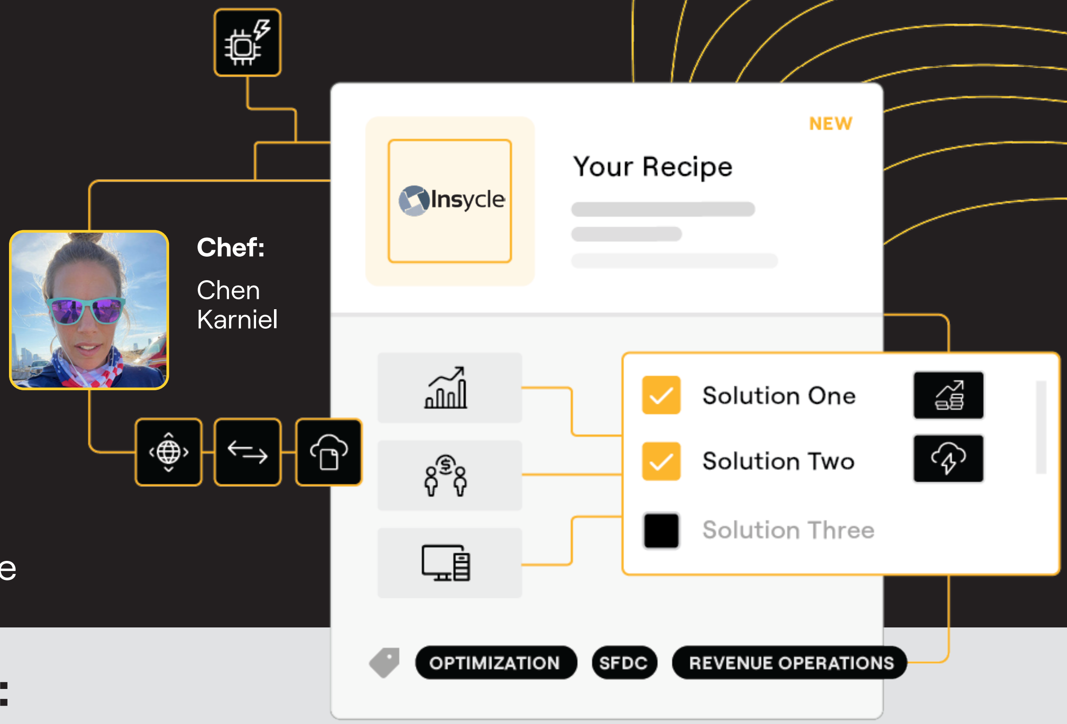
What You'll Need:

- Docket
- Professional Meeting Templates
- Well-defined Sales Cadence
- CRM

Steps to Success

- Start working with your sales team to understand what types of meetings they are scheduling most often. Think discovery calls, demos, follow ups, etc.
- Once you have an understanding of the meetings your sales team is conducting, you can start creating repeatable meeting agenda templates for them. The more processes you can templatize, the better!
- Once your sales team has the templates they need, have them start testing them out on their upcoming meetings. Remember to create and share an engaging agenda with your prospect's or customer's goals in mind. Reps can also take advantage of attaching materials ahead of time, allowing prospects to look over important information and come to the meeting prepared.
- During the meeting, reps should keep notes and assign follow-up tasks using Docket. Be specific here with deadlines and ownerships. At the end of the meeting, reps can share the meeting recap with their prospect or customer, and return to Docket to double-check what was discussed and decided.
- For sales leadership, Docket helps you stay on top of the meetings your sales team is conducting. If you connect Docket to your CRM (Salesforce, HubSpot, etc.) your team can store their important meeting notes and create a record so nothing is at risk of getting lost.
- Finally, check back on these notes in Docket or your CRM when questions arise. You can search Docket for important notes quickly and build your next meeting agenda from your previous meeting's notes, maintaining transparency and alignment.

How to Declutter your CRM Automatically



Company: Insycle

Introduction:

Ever wondered why your emails don't get opened? Can't sleep at night because you're worried about your sender reputation? Got more than mildly mad trying to filter, analyze, and utilize your previously-collected CRM data? We get it. Clutter makes it difficult to manage customer data and low-quality contacts are on no one's wish list.

That's why we came up with this foolproof secret recipe! It's been handed down for generations! It's easy, fun, and mess-free. Check it.

Automating routine data maintenance makes your teams more effective and enables them to focus on the big-picture strategies that drive growth.

- **Prep Time: 15 minutes**
- **Cook time: 10 minutes**
- **Yield: No CRM clutter! Quality contacts! Time for actual baking!**

Steps to Success

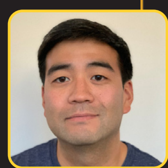
- Preheat the oven to 350 F. You are not going to use it, but it's nice to keep warm.
- Using a handheld mixer, run Insycle's health assessment to identify issues in your database. The automated tool will search - and find! - common data errors in your entire database.
- Gently unfold and look at the assessment results. Click next to each item to reveal the issues: duplicates, bad formatting, invalid data. Do not overcook. It's OK. Help is coming.
- Click on each item on the list to fix the issue. Yes, it's that simple (you can safely fix your issues in "preview" mode first, for your analysis. This way you are not updating the data in the CRM). Coat lightly with powdered sugar.
- Once you're happy with the results you can run to fix it in "update" mode, now it will update in the HubSpot or Salesforce CRM.
- Use a large spatula to automate your fix recipe to run on a recurring basis. No more actual, manual work here. Yay!
- Assemble and decorate: Now with the automation running, you can just review the daily emails and monitor progress and... (cherry on the cake moment) - you don't have to do anything manually.
- Make yourself a nice cup of coffee and maybe sign up for an actual Zoom baking class? Because now you have time for this.

What You'll Need:

- HubSpot or Salesforce
- Insycle
- Sense of humor
- Dash of Team Spirit
- Love of cats
- Pumpkin spice
- Ok, not the last four. They are optional.

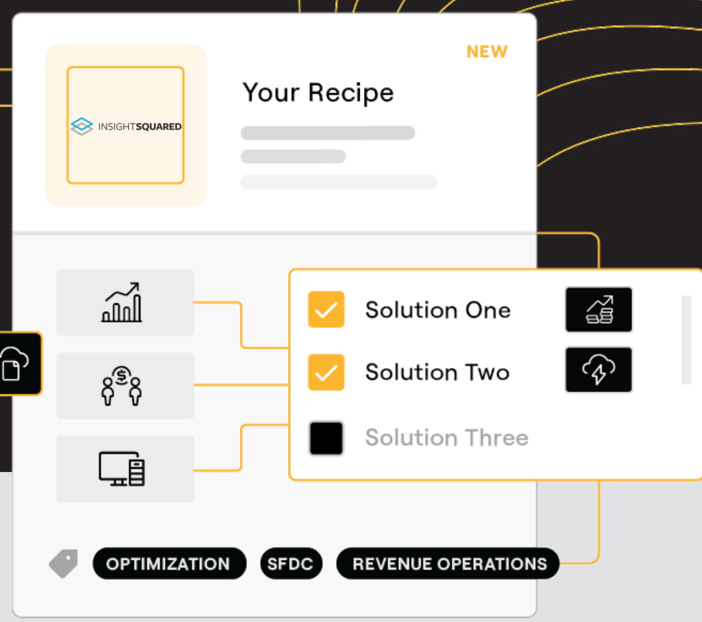
APTITUDE 8

Identifying Dying Deals Using InsightSquared



Chef: Daisuke Yasutake
Head of Commercial Sales

Company: InsightSquared



Introduction:

On average it takes sales reps more than three weeks to recognize and admit a deal is dead. This recipe enables sales execs, managers, and reps to effectively analyze the health of their pipeline in real-time—shining a spotlight on dying deals that require strategic mitigation or should be moved out of the pipeline and forecast.

Measuring deal health is a frequent challenge for B2B revenue organizations. Using automation, InsightSquared captures all key activity and engagement data from every person involved in the deal cycle. The next step is applying machine learning to analyze this robust dataset, mapping engagement activity to historical wins and losses to ultimately define the profiles of winning deals.

At the completion of this recipe, B2B reps typically find themselves closing three additional deals per year, due to improved visibility and awareness of deal health. Finally know which deals are on the right trajectory, which deals need course correction, and which should be sent back to marketing for nurture.

What You'll Need:

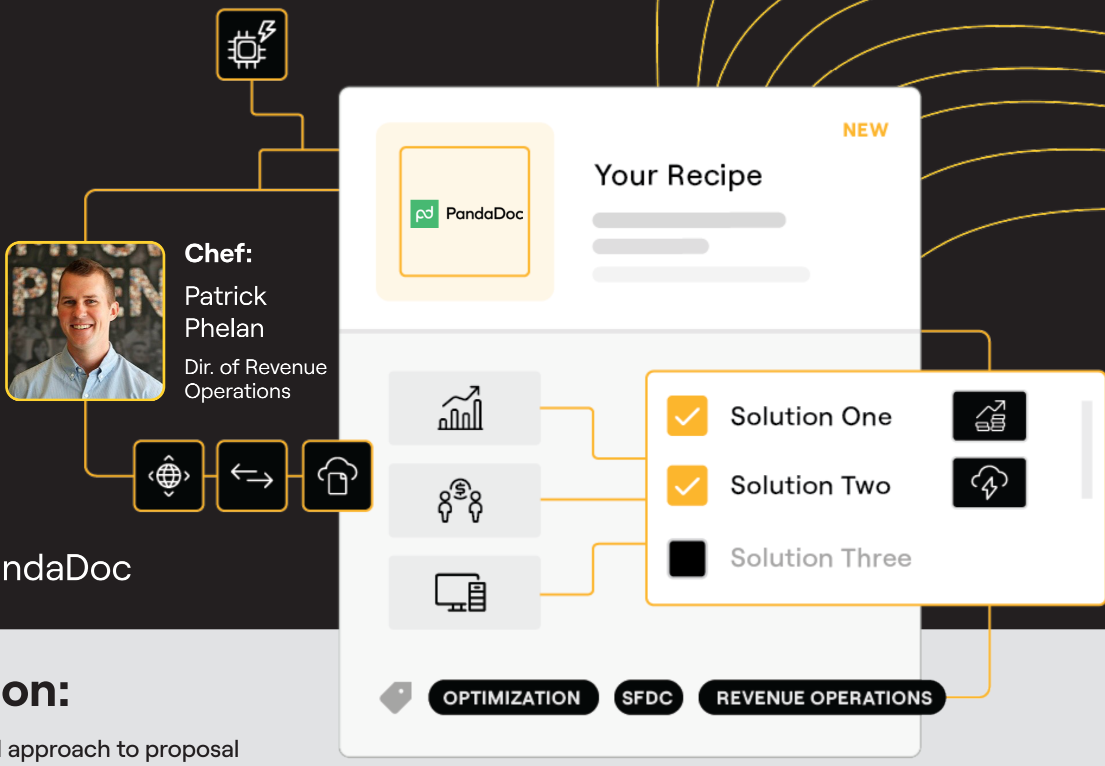
- Salesforce or HubSpot
- InsightSquared
- Google or Office 365
- Conversational Intelligence

APTITUDE 8

Steps to Success

- Get started by removing reps from manual data entry tasks, by activating automated activity capture from Google, Office365 and all of the other siloed engagement, conversational and content tools used by sellers.
- Ensure data is properly integrated, regardless of the tool it originated from, and included in machine learning analysis, for accurate deal scoring and validation of rep inputs.
- Data should be auto-written back to Salesforce or HubSpot to ensure the CRM continues to be the system of record.
- From there it's important to pause and review the output from the Machine Learning analysis, to understand how wins and losses behave differently within your unique sales process.
- Look for triggers such as long response times for inbound emails, lack of decision maker engagement, quantity of deal pushes, limited number of contacts and more. These should be easy to spot in your dashboards and reporting in InsightSquared.
- Apply Action prompts to automatically alert reps when deals venture outside the optimum track, allowing them to make an adjustments before it's too late, or close out the Opportunity and focus elsewhere.
- Managers should use the data in their 1:1s & pipeline reviews to ground the conversation in fact—rather than gut feel. This removes human bias and allows managers to coach to risk, while identifying upside. Knowing the dataset is high quality ahead of the meeting means time is no longer wasted updating the CRM or interrogating the reps.
- Continue to run strategic plays on stalled deals, in collaboration with manager input. Watch carefully for impact and refine the forecast—continuing to monitor the machine learning confidence to close models.
- The output should be rich, real-time visibility into the health of individual deals as well as the overall funnel so you not just meet, but beat forecast goals.

How to Close Proposals Faster



Company: PandaDoc

Introduction:

Using a data-backed approach to proposal creation is not always natural and easy for a sales person. But without using a few simple data tracking insights, you could be leaving a large number of deals on the table and slow down your sales process. The reality for most businesses is that just a few changes can lead to increases in close rates of several percentage points.

At PandaDoc, we've tried everything under the sun when it comes to creating, sending and tracking proposals. We've also measured every single step and gathered insights by studying proposals sent by over 10,000 customers.

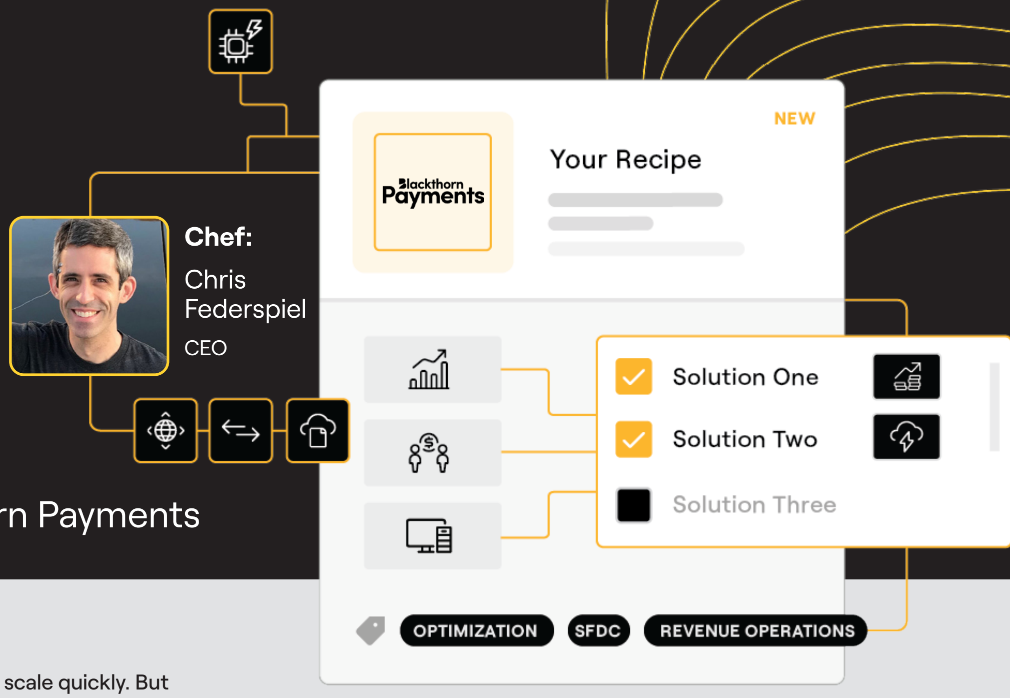
What You'll Need:

- A Service or Solution to Sell
- PandaDoc

Steps to Success

- Experiment and assess which day of the week your proposal is most likely to close. Surprisingly we found a proposal is more likely to close on Friday or the weekend more than any other day during the week.
- Include at least 1 image or video in your proposal. A proposal with media (photos or videos) is 32% more likely to close. What really helps a winning proposal is to keep it well structured and separate text blocks with clear headers.
- Create 1-2 templates to build proposals from. Templates are huge time-savers for creating the same doc over and over.
- Including an electronic signature block on the proposal helps proposals close faster.
- Discover the right proposal length that has the highest conversion for you. Our data shows proposals with 6-8 pages drive the highest conversion.
- Automate proposal reminders to your prospects. Reminders increase your likelihood of closing by 30%.

How to Automate Payment Processing and View Important Financials in Salesforce



Company: Blackthorn Payments

Introduction:

A primary goal of any business is to scale quickly. But as your organization grows, you'll find certain everyday tasks prohibit you from scaling, stifling your operational efficiency. One common snag is payment processing, especially if your company works with Salesforce to manage your customer data.

The key way to scale your finance and accounting processes is to use a Salesforce-Native App that automates how you accept payments from your customers, while simultaneously connecting important payment information to your contacts and accounts. This reduces downstream reconciliation issues that can hurt cash flow, helping you get paid faster and show you real-time financial reports.

So what do you need to do? Turn to Blackthorn Payments for help with any payment processing scenario in Salesforce (one-time payments, invoices, or recurring subscriptions).

What You'll Need:

- Salesforce
- Blackthorn Payments
- A payment gateway or processor
- Your current payment processing issues and an open mind on how our team can help you fix them!

Steps to Success

First, you'll need a member of your finance or accounting team who loves Salesforce (or add in your team's Salesforce Admin), efficiency, and the ability to see all the numbers in one place.

Next, you'll want to take Blackthorn Payments for a spin via their free trial found on the Salesforce AppExchange. Find out how easy it is to set up and complete your first transaction in under fifteen minutes with our Payment Setup Wizard.

After that, you'll want to visit www.blackthorn.io/payments to see how others have used Blackthorn Payments to manage:

- One-time payments
- Invoices
- Recurring or subscription billing
- Taking payments with a mobile device and card reader
- Payments via email, website form, over-the-phone, and more

Once you receive your customer's first payment, important transaction information like date, amount, and payment method type is logged automatically on a unique transaction record that relates directly to your Salesforce opportunity and contact/account records.

Also very important, credit card numbers, bank and other sensitive information NEVER touches the Salesforce database. Instead, it gets routed directly to the payment processor, and any subsequent charges (like automatic recurring payments) use that stored token, making your payment processes PCI-Compliant.

Here's where it gets really good. After more of your transaction data accumulates, you can

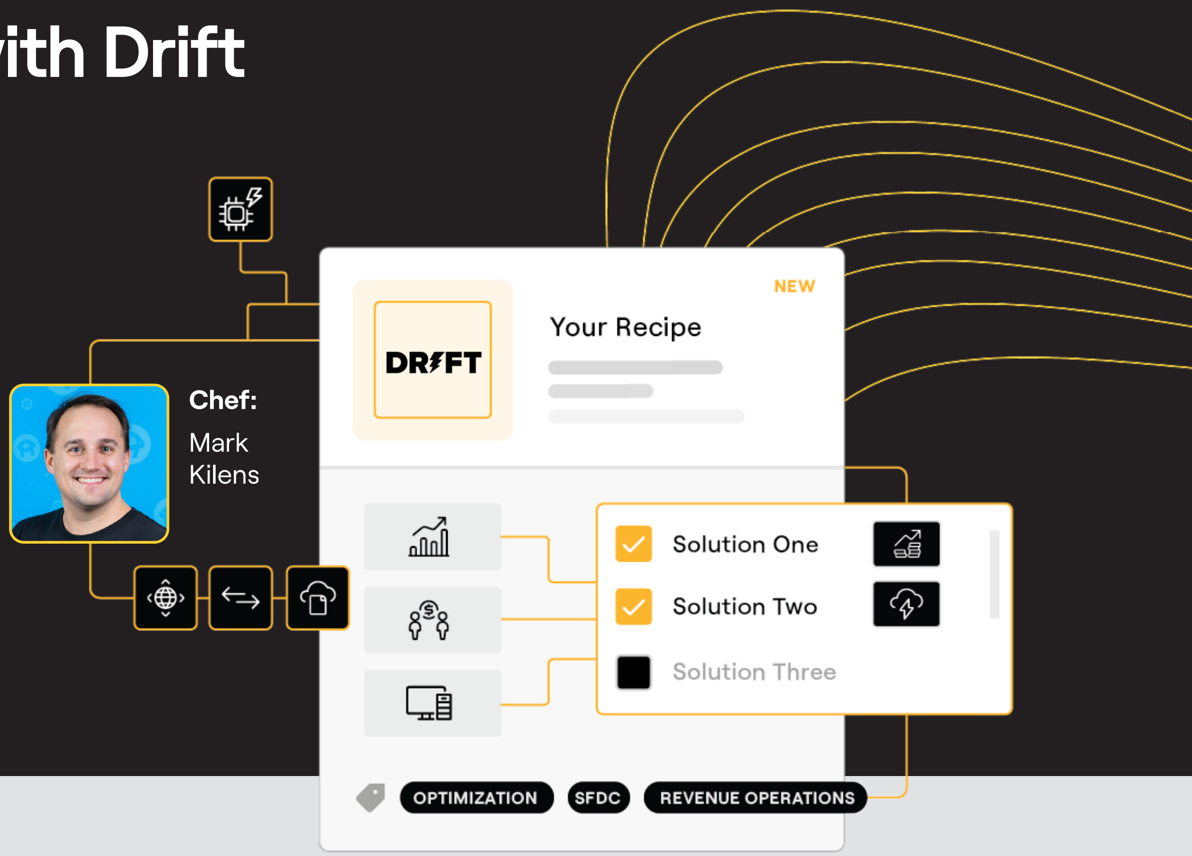
1. Use Salesforce reporting (Blackthorn has out-of-the box financial reports) to view real-time financials, like ARR, MRR, and outstanding or overdue payments.
2. Use Salesforce automation logic to trigger repetitive payment processes, like monthly billing subscriptions, requests for new cards if existing cards on file expire, and much more. Blackthorn provides out of the box automation processes to help your team get going fast.

This part is crucial: Be sure to set up a time with one of our Blackthorn Payments experts to hear success stories and talk about how we can help with your unique needs.

After that, keep the gravy train rolling by turning your trial into an affordable subscription and enjoy spending time on your customers and growing your business instead of dealing with payment processing logistics. Oh, and watch the money come in (literally, and in real-time).

APTITUDE 8

Bring Sales and Marketing Together to Accelerate Revenue with Drift



Company: Drift

Introduction:

Today's buyers are more digitally savvy than ever – and their journeys increasingly more complex. To keep up, B2B leaders, especially those in the enterprise, must scale their go-to-market strategies and double down on digital engagement.

That's why companies, like PTC, rely on Drift.

Drift's Revenue Acceleration Platform delivers real-time, personalized sales and marketing engagement at scale – turning websites and marketing channels into revenue-generating machines. By coupling Drift with software like 6sense and People.ai, businesses can identify best-fit target accounts, evaluate deal health, and engage target buyers 24/7/365. It's the ultimate recipe to turn dream accounts into customers.

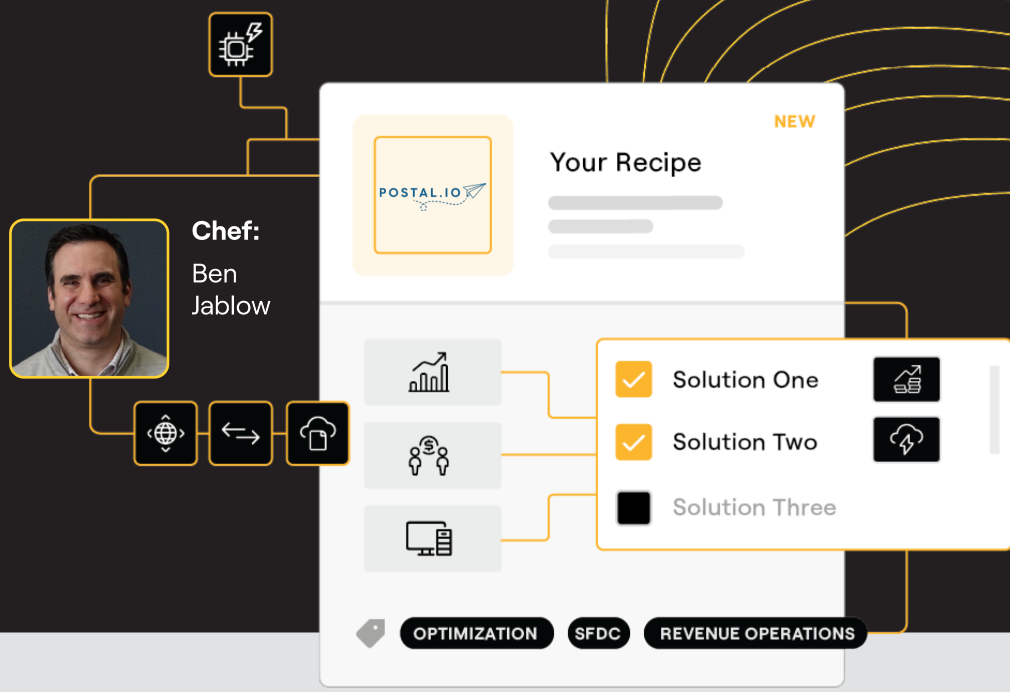
What You'll Need:

- Drift
- 6sense
- People.ai

Steps to Success

- Find your dream accounts. With 6sense's account intelligence, your marketing and sales teams can identify and prioritize "best-fit" accounts easily.
- Use personalization to increase conversions. Use Drift to greet website visitors with personalized messaging, and route contacts to the right sales reps.
- Engage target buyers and book meetings 24/7. Drift instantly notifies sales when a contact from one of those target accounts is on your site, so they can reach out in real-time. Rep not available? No problem. Drift can jump in and book a meeting or navigate buyers to the content they need. (Even while sales is sleeping.)
- Identify the buying committee and stakeholders. Accelerate your sales cycle by using Drift Prospector to map out buying committees and to see which stakeholders are engaging with your content.
- Finally, create a predictable pipeline. Act on data-driven insights that create consistent wins for your team. Identify a path to revenue and ensure a healthy pipeline by combining 6sense's intent scores with People.ai's predictive deal health and key indicators.

Unifying Sales and Marketing with ABM Strategy to Accelerate Revenue



Company: Postal.io

Introduction:

Every business has been sending mail for years. The oldest trick in the book is to utilize direct mail as part of your TOFU marketing strategy. Whether it's a hand-written "thinking of you" or a "thank you" note, the idea is to create a sentimental connection between your prospective clients.

While an unexpected thoughtful note can be recognized as a sincere form of reaching out, the concept of scaling direct mail in marketing campaign effort is one that needs to be baked in thoughtfully! Lucky for you the recipe below walks you through how to successfully automate and integrate direct mail with your online campaigns in HubSpot.

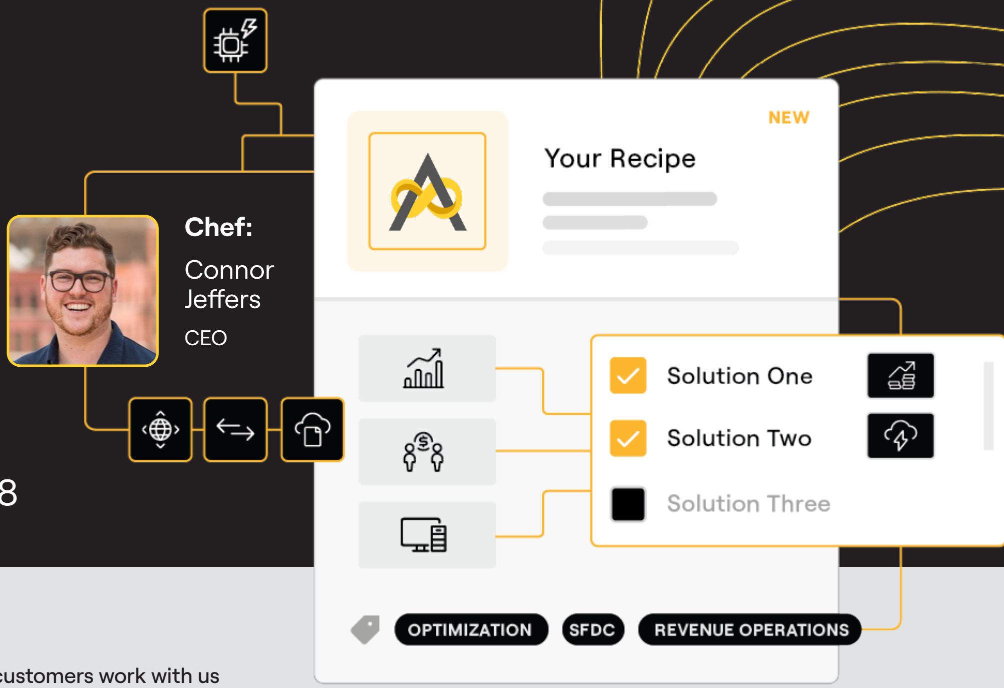
What You'll Need:

- Marketing Team
- Killer graphics
- Actionable content
- HubSpot

Steps to Success

- First visualize your current campaign strategy - You can roll this out the same way you would with a social media or digital marketing campaign.
- To get started, you will need to either build out new HubSpot workflows or utilize your existing HubSpot workflows. For this recipe, we will combine the power of HubSpot's Marketing and CRM platforms using automation with triggers to send offline assets. The goal here is to create the ultimate revenue generating engine.
- Next, roll over your current workflows, see what enrollment triggers can use a little mixing up. Identify which enrollment triggers can use a step for an offline send. Go ahead and add a placeholder for your send.
- After that, simply log-into Postal and have your Marketing team prepare your content from template creation to graphics. Blend both using the Postal direct mail editor. While in Postal, turn on the Postal trigger for HubSpot based on the names of your workflows.
- Now with your content whipped and ready to go in Postal, go back into HubSpot and attribute the sending of the direct mail to the placeholders you have set for your enrollment triggers. Don't forget - Make sure that you have personalized the messaging based on the enrollment trigger. For example if the enrolment trigger mentions welcoming a new client, ensure you address this! We all know that nothing tastes worse than a random piece of content.
- Once you have everything baked into HubSpot, you're going to enable the workflow for usage!
- Now that you have your process, the rest is pure icing on your cake. Make sure you are keeping an eye on your reporting to track your direct mail deliveries, sends and your overall conversion rates. Experiment with tying in different enrollment triggers and direct mail pieces for A/B testing.
- Once you have hit your sweet spot, it will be a cake walk.

How to build a reporting tech stack for revops



Company: Aptitude 8

Introduction:

One of the most common reasons customers work with us is because they struggle to get a handle on their marketing and sales reporting. While many perceive this to be a technology issue, usually the root cause is a combination of user behavior, data structure, business process, and reporting infrastructure. It is really the perfect RevOps problem.

Hubspot is amazing at marketing analytics and top of funnel reporting, but when it comes to stringing together a history of conversions and seeing multi touch journeys with key conversion events, you need something more robust. Salesforce is a powerful database, but lacks the key marketing data to drive the rules around attribution. Both have native reporting, but when it comes to cohorts and conversion funnels it all starts to get really complicated.

My favorite way to solve this is by leveraging 3 different systems; Hubspot, Salesforce, and Insightsquared. You can also get pretty far with just the former 2 if a BI tool isn't in the budget just yet.

What You'll Need:

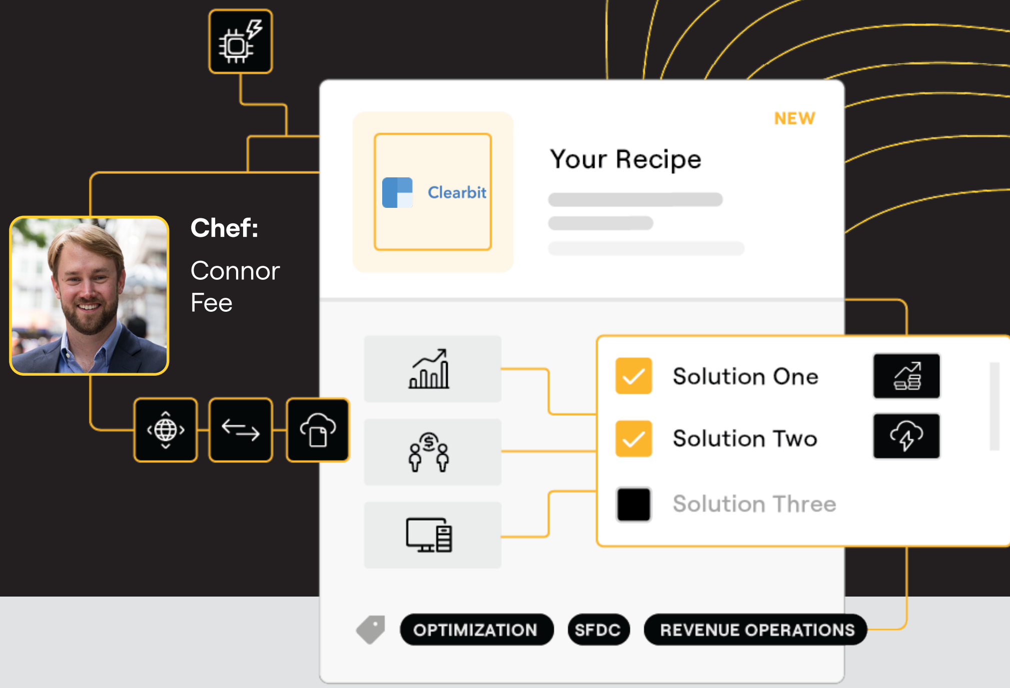
- Hubspot
- Salesforce
- InsightSquared
- A Demand Gen Strategy

APTITUDE 8

Steps to Success

- Define your Demand Gen reporting strategy. Before starting this recipe, you need to decide what is most important to report on. We like to use hierarchies based on asset (such as the revops cookbook!) and then have sub campaigns based on the channel something came from (like paid social). However, we have seen people break this out by affiliate partner, content type, product, or whatever aligns best to the reporting that helps you.
- Build a Salesforce Campaign Hierarchy. By defining your campaign hierarchy inside of SFDC, you can then build dashboards and other reporting off of this structure to see aggregated data (like how many leads did the revops cookbook generate) and sub campaign specific metrics (like how well did our linkedin ads perform for this asset). Bonus points for using channel or strategy custom campaign picklists to further segment your data.
- Add hidden UTM fields to your web forms. You are likely already using UTM codes in your web links, but by adding hidden UTM fields to your forms, you can ensure you get that UTM data tied back to the contacts themselves instead of just generalized inside of Google Analytics.
- Leverage Hubspot's Marketing Analytics. Hubspot's tracking code automagically adds UTMs to all of your marketing efforts, so you don't have to worry about constantly maintaining a series of links to capture this data.
- Use Hubspot as an Air Traffic Controller. Create Hubspot workflows for your forms that intake inbound leads and determine what to do with them based on fields on the form itself, enriched data (through something like a zoominfo or a clearbit), and your personal business rules.
- Enroll in Salesforce Campaigns. Using this logic, you can use a series of if thens to say if a lead came from the Revops cookbook, and from paid social, add to the salesforce campaign for RevOps Cookbook - Linkedin Ads as a child to your parent campaign RevOps Cookbook 2021.
- Use Campaign Member Statuses. All campaign history isn't equal. You can write in different statuses to Salesofrce to differentiate between true MQLs, or just folks that registered for a webinar yet never attended, or ebook downloads vs requests to talk to sales. You can then use this to see the history of your campaigns.
- Use Primary Campaign Source on Opportunities. The Aptitude 8 team uses a custom trigger to find the best campaign to associate to newly created opportunities (we also make our own puff pastry, its not a big deal), but you can use the out of the box salesforce functionality too. Since you have campaigns on your contacts, any newly created opportunities will grab the most recent campaign and attribute it back.
- Push it all to InsightSquared (Optional) Inside of Salesforce you can now see how many leads your campaigns are generating, and which opportunities you generated. You can take this even further with InsightSquared by looking at which campaigns generated the most original conversions, generated opportunities, and even which ones contributed to a sale over time despite never being first in or last out.

Converting Buyer Intent Data to Automate Prospecting Using Clearbit



Company: Clearbit

Introduction:

This recipe will be especially helpful if your company runs campaigns that drive a lot of anonymous visitors to your website, like paid ads for example. Although you do not know who they are yet, this traffic is a goldmine of information your sales team can use and convert into revenue.

This is where Clearbit comes in to save the day. Instead of seeing these visits as anonymous numbers, Clearbit can capture data about them, sync information to your CRM, and match it to your target accounts. Better yet, by layering in an automated email system like Outreach or Hubspot, you can automatically trigger prospecting emails saving your sales team the leg work, and lowering your CPL.

What You'll Need:

- Salesforce
- Clearbit
- Hubspot or Google Analytics
- Outreach

Steps to Success

- Think about every account, within your target market, that your team would love to close. Take that and use it to create your target account list in Salesforce. Don't forget to tag them with a custom field.
- Integrate your Clearbit account with Google Analytics (GA) to unmask your hidden prospects.
- Use Salesforce to connect your two data sets (your site traffic + target account list) based on IP, and match where traffic from target account = true. This part can get a little hairy, make sure you have backup!
- This step is your secret weapon, use Clearbit to find Target Persona Contacts at Target Accounts who have visited your site.
- Write & build an email sequence in your preferred outbound email tool targeted at those personas. But not in a creepy way, you don't want to be too forward. Like a good first date.
- Use your list of contacts from Clearbit and enroll them in your outbound email sequence automatically.
- Create a dashboard in Salesforce to track the success of this campaign. Otherwise, you'll lose all bragging rights.
- Remember, all great recipes change over time. Check the sequence every two weeks or so to make optimization updates.

How to build a scalable sales outreach process without losing the personal touch

Company: HubSpot

Introduction:

Building a delightful customer experience is the key to growth in today's market. But as your company scales, it becomes increasingly difficult to deliver the personal touch that your customers have come to expect. Your teams add more products, people, and processes to maintain their rate of growth, and over time, complexity creeps in.

Sales teams are usually the worst impacted by this complexity, often having to manage multiple tools and double-check data, while trying to hit aggressive revenue targets.

In order to scale revenue, sales teams need an operating system that allows them to automate manual tasks and drive efficiency, without losing their ability to deliver the personal touch that matters so much to buyers.

That's where the HubSpot CRM and its wealth of sales enablement integrations come in.

The HubSpot CRM gives scaling companies a single view of customer data across all teams. By integrating it with an email client, like Gmail, sales teams can view customer data from directly inside their inbox, allowing them to deliver a personalized, contextual message with ease. They can also directly access HubSpot's productivity tools, like templates and sequences, while writing an email to a prospect, enabling them to automate the all-important follow-up.

And when an iPasS (integration platform as a service) solution, like Zapier, is added to the mix, sales teams can have total confidence in the accuracy of their data, even as it's updated across different apps and tools. iPaaS solutions, including those available in the HubSpot App Marketplace, automatically sync data between apps, meaning that when a prospect's contact information is updated in one app, that change is reflected in the HubSpot CRM in real time.

This empowers sales teams to create a hyper-efficient outreach process that's still deeply personal — a combination that's critical for scale.

What You'll Need:

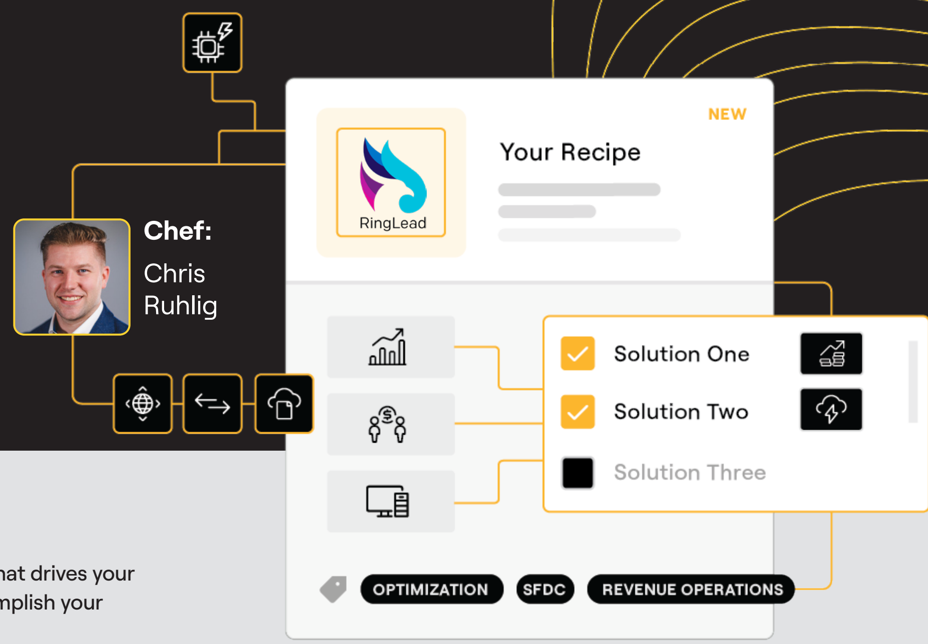
- HubSpot
- An email client (eg. Gmail)
- An iPaaS solution (eg. Zapier)

Steps to Success

- **Integrate your email client with HubSpot:** tools like Gmail and Outlook can be integrated with HubSpot in a matter of clicks. The same goes for iPaaS solutions like Zapier that are available in the HubSpot App Marketplace.
- **Personalize your email outreach:** by clicking the sprocket in on the right-hand side of your email inbox, you can view the contact record of whoever you're reaching out to. This will give you instant access to everything from their personal contact information to deal status — essential ingredients to delivering a contextual message.
- **Craft an engaging message:** once you open the compose window in your email client, you'll be able to search email templates and choose the perfect language for your outreach.
- **Automate your follow-up:** within the compose window, you can also select 'sequences' and schedule a series of follow-up emails, specifically tailored to your prospect's situation and needs.
- **Log your communication in the CRM for other teams to see:** with one click, you can log all of your email correspondence with a prospect in their contact record. This is not only beneficial to sales teams, it also provides customer service teams with a complete and accurate history of the prospect's journey to becoming a customer, better enabling them to deliver a personalized experience.

Drive Revenue Efficiency by becoming data driven through an advanced Data Orchestration Strategy using RingLead

(Improve your Lead-to-Cash ratio)



Company: RingLead

Introduction:

In today's world, data is everything. Data is what drives your business to new heights, and helps you accomplish your key growth initiatives.

Becoming a Data Driven organization has been a goal for the vast majority of organizations over the last decade or so... But what people aren't talking about is the fact that over the past 3 years, the percentage of firms identifying themselves as being data driven has declined each year (37.1% in 2017, 32.4% in 2018, and 31% in 2019). (Companies Are Failing in Their Efforts to Become Data-Driven)

RingLead's Data Orchestration Platform drives revenue efficiency by helping companies maximize the value of their most important asset - their data. Whether it's data that exists in the CRM today, new data being created, or data that has yet to be found or delivered to your team, RingLead grows your revenue by operationalizing all of that data in an automated fashion. Our platform manages any action that you need to take to get the most from your data.

What You'll Need:

- Salesforce
- RingLead
- A marketing automation platform (nice to have, but not 100% necessary to use this recipe)
- 3rd party data vendor subscription(s) (nice to have but not 100% necessary to use this recipe)

APTITUDE 8

Steps to Success

- **Step 1: Make your CRM work for you.** Have a plan, structure your CRM in a way that makes sense for your business. Consider which objects you are going to use? Are you a B2C shop, or a B2B shop? What makes the most sense for "your" business?
- **Step 2: Define your data flow.** What is the "ideal flow" of a record through all of the different applications, platforms and systems that you are using and how will you take action on it?

Define your Data Orchestration Strategy

- **Step 3: Determine your retroactive hygiene plan.** What will "qualify" as a duplicate record? How is your database currently segmented? Have you identified your current ideal customer profile?
    - Take action on your existing database where needed with RingLead. Cleanse and remove duplicates that are currently existing based on any combination of custom or standard salesforce fields... Normalize field values to enhance your reporting ability... Update currently existing records to follow your territory plan... Delete unnecessary records that are taking up storage.
- **Step 4: Determine your ongoing/real-time hygiene plan.**
    - Prevent duplicates from being created ever again.
        - Records have multiple ways of being created inside of Salesforce (manual entry, list imports, webform submission, 3rd party applications) and it's important to, at the point of entry to detect and merge into an existing record that is flagged as a duplicate rather than create a duplicate. According to SiriusDecisions, it costs a company $1x to prevent a dirty record, $10x to correct a dirty record after it has been created, and $100x if nothing was done and that dirty record stayed in your database.
    - Enrich records as they are being created from multiple 3rd partner data providers that you may be subscribed to.
        - Use RingLead to connect to your 3rd party Enrichment vendor(s) and establish processes to follow depending on unique criteria of the record. For example, if a webform is being submitted through your marketing automation platform and you have a field that identifies the industry as healthcare, you'd be able to direct that record to call the vendor that specialized in the healthcare industry versus a different vendor that may specialize in providing data for the Technology industry.
- **Step 5: Take Action on your Go to Market Strategy, Terrority Plan, and Corporate Analysis.** Route your records to the correct member of your team, at the best time, for them to take action on that record.
    - Use RingLead to ensure that your territory plans are being followed automatically and the correct account segmentation is being applied as well.
        - If a record comes in what your organization calls the "Enterprise Segment" and the state of "New York", you can have RingLead platform round robin that record across your Enterprise Northeast Account Executive team. So the first record that comes through would go to Brittany, the next may go to Mike, and the last would go to Jaime but they would all end up with equal amounts.

Thank you so much for taking the time to read through the RevOps cookbook. It was truly a labor of love for me.

A little background on the cookbook itself. In my personal time, I really enjoy cooking and reading through cookbooks. One day in a meeting with Connor, I mentioned in passing “wouldn’t it be cool if there was a collection of RevOps ideas, kind of like a cookbook”. Without hesitation, we both decided this idea needed to be brought to life.

Every step of the way, from my dreaming up the idea, reaching out to potential partners and working with the chefs on their recipes was a joy. I was met with so much encouragement and support that all of the pieces came together so naturally.

That said, I would also like to take this opportunity to thank everybody that pitched in to help make this happen. Internally at Aptitude 8, our designer Anthony Anchante, developer Niko Dixon, Demand Gen practice head Emily Wingrove and of course our CEO, Connor Jeffers.

In addition, I am grateful to the chefs for lending us some of their RevOps secrets and their respective marketing & content teams for helping with all of the behind the scenes work.

Truly, this would not have been possible without your partnership.

Once you’ve had a chance to test out some of these recipes, please let me know how they worked out! I would love to hear from all of you, so feel free to reach out to me on LinkedIn.

Happy building,

Kaitlynn Sirotkin