# 30 Day
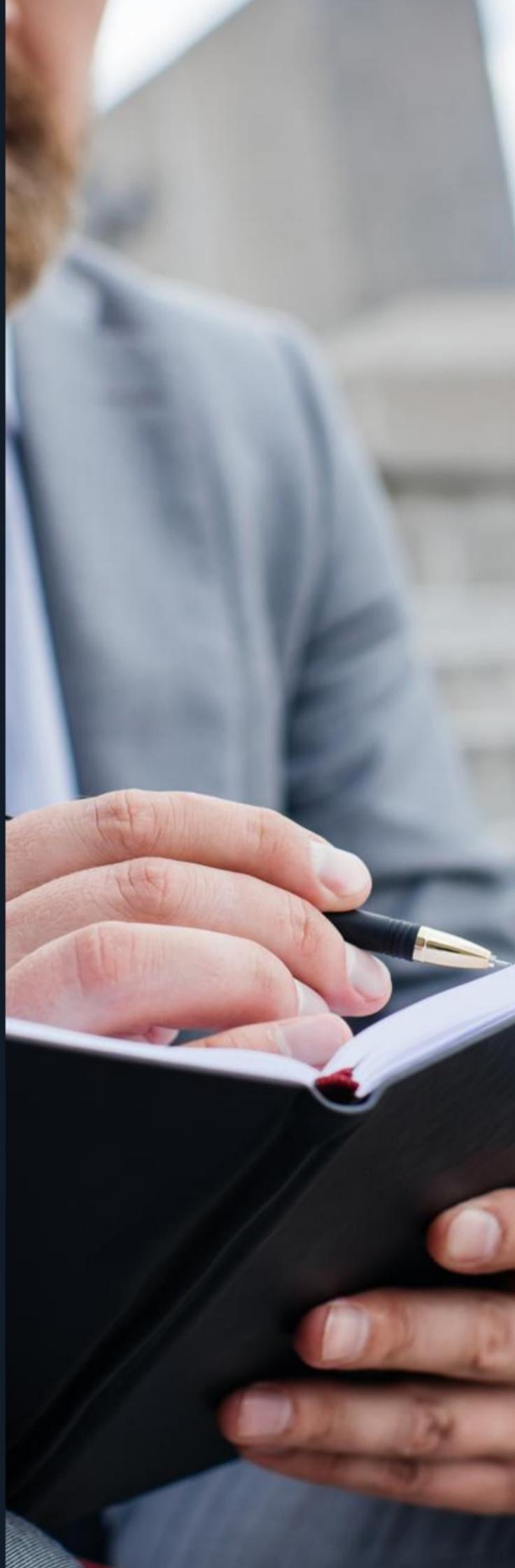
# REVOPS
## TASK PLANNER

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# Overview

Thank you for downloading the "30-Day RevOps Task Planner". This planner outlines a step-by-step activity roadmap that you can easily follow to start implementing the RevOps foundation and document its progress.

"RevOps" might sound fancy as it is a new concept for most people, but it's just a data-driven way to supercharge revenue generation by creating a frictionless team alignment and making business processes efficient.

This planner guides you through a systematic approach that will help you to easily document the successes & failures at each stage of your RevOps implementation. By using this planner for the next 30 working days, you will not only build a very strong foundation for revenue operations at your company, but you'll also start to see some positive measurable results.

I recommend executing this planner from a Monday and following it for the next 30 working days. Also, try to finish each day's activity in 2 hours.

As you perform each day's task, you'll find new insights and feedback and you will also notice incremental improvements in the way your primary go-to-market functions collaborate with each other within a short period. This could be more open discussions on new campaigns or better tracking of KPIs. You know how puzzle pieces fit together? Well, RevOps can help different parts of your business fit together, like a team.

But wait, you're not alone on this journey. Just like having a helpful close friend to guide you, I'm here to answer your questions and give you good ideas wherever you feel stuck. So, let's get started!

Your RevOps Partner,
Shaiq Uddin



www.shaiquddin.com

# About Your Business

Write your full name and your job title. (e.g., John Doe, Head of RevOps)

<br>

What is your company/business name? (e.g., XYZ Corporation)

<br>

What's your company/business website? (e.g., xyzcorporation.com)

<br>

Which industry or vertical does your company operate in? (e.g., SaaS)

<br>

Does your company have a dedicated revenue operations department?

<br>

If your answer is Yes, what's the team size and who's the decision maker?

<br>

What was last year's revenue and this year's projected revenue? (In USD)

<br>

What's your current Marketing team size and who leads it?

<br>

How many employees work in your Sales team and who leads them?

<br>

What's the headcount of your Customer Service team and who leads it?

# (Day 1)
# Assess Your Current Revenue Strategy

Evaluate your current revenue sources and core business challenges.

Analyze your existing customer acquisition channels & identify any gaps.

Knowing what you want to achieve is critical for success. Write down the #1 most essential goal that you want to achieve in the next 30 to 90 days.

# (Day 2)
# Team Huddle

In 100 words, write a short pitch that you will use to explain your idea of implementing RevOps to GTM teams? Make sure to include the benefits.

Invite your GTM teams (sales/marketing/service) for a joint session and explain your idea of RevOps implementation. Encourage participants to share their thoughts on improving collaboration and revenue generation. How was the overall reaction? What feedback or insights did you receive?

# (Day 3)
# Understand Your Customers

Write the top 5 sales objections or pain points your customers talk about.

Which of your products or services can solve these customer pain points?

Write down some ideas on how these product or service offerings could be improved to address the above pain points. Would any of these ideas solve your customers' problems while saving them time or money?

# (Day 4)
# Define Your Ideal Customer Profile (ICP)

Using the pain points and revised product or service offerings from Day 3, outline your ideal customer profile. It is okay if it's not perfect at this stage.

Are there any specific points that you think should be added or removed?

Revise all the points and rewrite your ICP. Don't forget to give it a name.

Day: _____                                    Date: ___ / ___ / _____

# Ideal Customer Profile #2 (Optional)

*If you target multiple audiences, you can build an ICP for each of them.*

Using the pain points and revised product or service offerings from Day 3, outline your ideal customer profile. It is okay if it's not perfect at this stage.

Are there any specific points that you think should be added or removed?

Revise all the points and rewrite your ICP. Don't forget to give it a name.

# Ideal Customer Profile #3 (Optional)

Using the pain points and revised product or service offerings from Day 3, outline your ideal customer profile. It is okay if it's not perfect at this stage.

Are there any specific points that you think should be added or removed?

Revise all the points and rewrite your ICP. Don't forget to give it a name.

# (Day 5)
# Collaboration & Communication Analysis

Describe how well your go-to-market teams collaborate with each other.

What tools are being used for internal communication (email, chat etc.)?
On a scale of 1-10, how effective is the current team communication?

What are some ways that you think could improve team collaboration?

# (Day 6)
# KPIs Evaluation

What KPIs each of your GTM teams are currently accountable for?

| Marketing | Sales | Customer Service |
|---|---|---|
| *e.g., Cost Per Lead* | *e.g., Deal Win Ratio* | *e.g., Response Time* |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

List down the 3 most critical KPIs for marketing, sales, & service teams.

| Marketing | Sales | Customer Service |
|---|---|---|
|  |  |  |
|  |  |  |
|  |  |  |

What factors did you take into consideration to select the above KPIs?

# (Day 7)
# Accountability Measures

Refer to the findings from Day 6 and briefly describe how you will ensure accountability for each go-to-market team against their selected KPIs.

| Top 3 Selected KPIs | | Proposed Accountability Measures |
|---|---|---|
| Marketing | | |
| | | |
| | | |
| Sales | | |
| | | |
| | | |
| Customer Service | | |
| | | |
| | | |

# (Day 8)
# Cross-Functional Brainstorming

Gather functional heads of all GTM teams for another meeting to discuss your work so far. Present the new Ideal Customer Profile(s), your ideas for improving collaboration, and proposed KPIs & accountability measures. Was your plan accepted? What feedback or objections did you receive?

On a scale of 1-10, how you'll rate the outcomes of this meeting and why?

# (Day 9)
# Progress Assessment

Using the new insights you've discovered so far, as well as the feedback and outcomes from your last GTM team meeting, describe what were your major wins and where do think you could have done better?

Write down the key takeaways from your learnings that you need to take into consideration moving forward to make further improvements to your ideas, processes, and systems. (This will help you to plan your next steps).

# (Day 10)
# Refine Your Approach

Using the new insights & feedback, how does your final ICP look now?

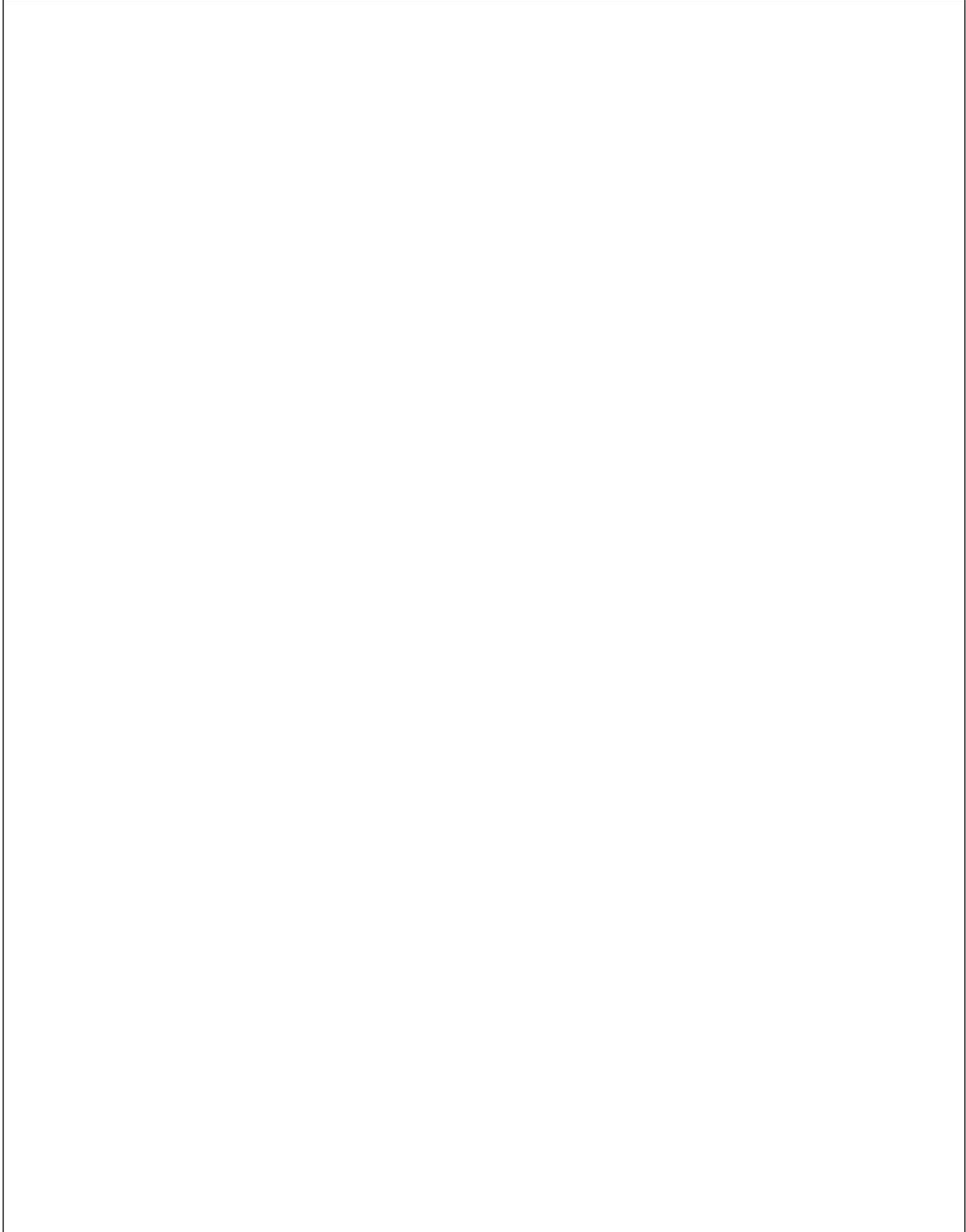What steps you'll take to improve team communication & collaboration?

Are there any changes to KPIs & accountability measures? Write below.

# (Day 11)
# Customer Journey Mapping

Draw a visual representation of how your Ideal Customer will interact with your business. Try to cover discovery to purchase and after sales process.

# (Day 12)
# Marketing Activity Plan

Work with the marketing and sales teams to outline all the marketing activities for the next 2 weeks. This could include social media campaigns, content creation tasks, and lead generation efforts that will be performed. Make sure to align both teams on the new KPIs & accountability measures. Discuss how both teams can support each other's efforts to drive results.

# (Day 13)
# Sales Activity Plan

Take both sales and marketing teams onboard and outline the sales tactics such as prospecting, follow-ups, and closing techniques for the upcoming 2 weeks. <u>Make sure to align both teams on the new KPIs & accountability measures</u>. Discuss how marketing can support sales to win new business.

# (Day 14)
# Customer Engagement Plan

Now align all three GTM teams and plan how customer service will engage with new and existing customers to ensure their satisfaction and loyalty. <u>Make sure to align all teams on the new KPIs & accountability measures.</u> Discuss what information can marketing team provide to customer service and how sales can assist support teams over the next two weeks.

# (Day 15)
# Midway Checkpoint Assessment

Based on the activities so far, what progress was made, what were your major wins or failures, and how well the teams got aligned on new KPIs?

Write down the key takeaways from the activities you have performed so far and mention any useful points that you need to take into consideration moving forward to further improve your RevOps framework.

# (Day 16)
# Daily Activity Summary

What marketing activities were performed today? Were there any issues?

What sales activities were performed today? Were there any challenges?

What actions did customer service take to help sales & marketing today?

# (Day 17)
# Daily Activity Summary

What marketing activities were performed today? Were there any issues?

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What sales activities were performed today? Were there any challenges?

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What actions did customer service take to help sales & marketing today?

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# (Day 18)
# Daily Activity Summary

What marketing activities were performed today? Were there any issues?

What sales activities were performed today? Were there any challenges?

What actions did customer service take to help sales & marketing today?

# (Day 19)
# Daily Activity Summary

What marketing activities were performed today? Were there any issues?

What sales activities were performed today? Were there any challenges?

What actions did customer service take to help sales & marketing today?

# (Day 20)
# Daily Activity Summary

What marketing activities were performed today? Were there any issues?

What sales activities were performed today? Were there any challenges?

What actions did customer service take to help sales & marketing today?

# (Day 21)
# Progress Assessment

What progress has been made so far? How well the KPIs were tracked?

What issues did the GTM teams face in collaborating with each other?

How will you resolve these issues to further strengthen the system?

# (Day 22)
# Daily Activity Summary

What marketing activities were performed today? Were there any issues?

What sales activities were performed today? Were there any challenges?

What actions did customer service take to help sales & marketing today?

# (Day 23)
# Daily Activity Summary

What marketing activities were performed today? Were there any issues?

What sales activities were performed today? Were there any challenges?

What actions did customer service take to help sales & marketing today?

# (Day 24)
# Daily Activity Summary

What marketing activities were performed today? Were there any issues?

What sales activities were performed today? Were there any challenges?

What actions did customer service take to help sales & marketing today?

# (Day 25)
# Daily Activity Summary

What marketing activities were performed today? Were there any issues?

[ ]

What sales activities were performed today? Were there any challenges?

[ ]

What actions did customer service take to help sales & marketing today?

[ ]

# (Day 26)
# Progress Assessment

What progress has been made so far? Do you see any KPI improvement?

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What issues did the GTM teams face in collaborating with each other?

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How will you resolve these issues to further strengthen the system?

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# (Day 27)
# Knowledge Sharing

Email the GTM team leaders and request them to individually share their experiences from the activities done so far using the RevOps approach.

What was the feedback and suggestion from the Marketing team leader?

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What was the feedback and suggestion from the Sales leader?

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What was the feedback and suggestion from the Customer Service head?

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# (Day 28)
# Customer Survey

Prepare and run customer survey feedback to understand their experience with your products or services. You should also include survey questions asking customers to rate and give feedback on your marketing messaging, sales interactions, and service quality. As an option, you may incentivize your customers with a discount or a coupon for sharing their feedback.

Wait for at least 3 working days for your customers to respond back, then critically analyze all the feedback received. Did you identify any trends or common issues that need attention? List them in the space below.

# (Day 29)
# Strategy Review

Revisit your initial strategy and activities to assess how many of the tasks planned for the last two weeks were smoothly completed and if there was any incremental improvement in the GTM team collaboration and KPIs.

Based on your analysis, what's working well and what needs adjustment?

# (Day 30)
# Reflection and Celebration

Gather all your GTM teams for a final celebration. Recognize the progress made and the collaborative efforts. Emphasize that revenue operations system is an ongoing cycle that requires continuous involvement of teams.

Discuss how to sustain the momentum and listen to everyone's ideas on how to improve the overall system to accelerate revenue growth. List down all the useful ideas and suggestions below that will help you to strategize and prepare your continuation plan.

# Keep Hustling!

Congratulations on completing the 30-Day RevOps Task Planner!

However, this is not the end but the beginning of a continuous journey toward sustainable business growth. Moving forward, you need to analyze your overall performance and progress to devise a continuation plan to further improve this system and your strategies.

I understand that it takes a lot of courage and discipline to step out of your comfort zone to bring a transformational change in an organization where you would face all kinds of objections and blockers at different stages of the RevOps journey. But that's exactly what it takes to succeed.

Since you've done a commendable job of putting all your energy over the last 30 working days into setting up a solid foundation for RevOps, it's time to applaud yourself and take a short break to refuel your mind and body. I'd suggest spending some quality time with your family and friends or may be head out to your favorite restaurant on the weekend.

Keep learning, adapting, and iterating for sustained success. Good luck!

**\*\*\*\*\***

## Want more RevOps advice?

Revenue Operations is more of a mindset shift than an organizational shift where you must continue to work regularly with your go-to-market teams to improve cross-functional team alignment, KPI tracking, accountability measures, and business processes.

As you progress, you will most likely need strategic advice and support to overcome more complex challenges in your way. This is where I come in.

Using my domain knowledge and a decade of leadership experience in the sales enablement, marketing, and revenue operations at both startups and large enterprises, you can accelerate your progress while saving the time, cost, and efforts of doing it all on your own.

**Schedule a Free 1-on-1 Call with Me**