

DRIFT + clari

THE GO-TO- MARKET PLAYBOOK FOR REVENUE TEAMS



How to Align & Action Marketing, Sales, and
Customer Success to Accelerate Revenue

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Clari, like Drift, has been singing the same tune that revenue is a process. For that reason, to truly impact long-term revenue growth, you need not just the solutions, but the processes in place, to make it happen.

INTRODUCTION

WHY B2B BUSINESSES NEED TO RETHINK REVENUE GROWTH



BY **TODD BARNETT**
Chief Revenue Officer, Drift

Sales has always had a seat at the c-suite table. After all, for CEOs, sales and revenue are top of mind in driving any strategic decision.

But the mindset that revenue growth begins and ends with sales has become outdated. This is due to three key shifts:

- A B2B buyer's journey that is more sophisticated, nuanced, non-linear, and unpredictable
- The rise of SaaS and new subscription-based revenue models requiring companies to re-win business and double down on metrics like recurring revenue, churn, up-sell, and net dollar retention
- And rapid innovation that has pushed companies to change growth initiatives and strategies faster than ever before

For these reasons, sales' responsibility around revenue needs to be shared across all revenue-generating teams: marketing, sales, and customer success. These shifts have required businesses to look beyond traditional and siloed revenue teams – and to the creation of roles like my own: the Chief Revenue Officer (CRO).

The CRO earned a seat at the c-suite table because revenue growth needs oversight. It needs constant maintenance and tweaking. And it needs someone at the helm removing silos and identifying the strategic levers to pull that will grow a company's revenue.

Alongside my emerging role has been the rise of revenue operations.

For years businesses have been talking about digital transformation and the need to streamline the customer experience – but not the internal changes that need to happen in parallel. As companies get smarter about their growth, they must introduce new processes to align and action their go-to-market (GTM) teams.

That's the beauty of revenue operations and Revenue Acceleration:

Revenue operations aligns the entire revenue team, streamlines operational cadences, and enables consistent execution. Revenue Acceleration helps action these teams in their day-to-day work.

Clari, like Drift, has been singing the same tune that revenue is a process. For that reason, to truly impact long-term revenue growth, you need not just the solutions, but the processes in place, to make it happen.

In this guide, we're sharing our playbook for aligning and actioning revenue teams through revenue operations and Revenue Acceleration. Plus, you'll learn from the leaders at these two companies on how you can drive revenue growth internally.

We're in unprecedented times – 2020 has forced us to throw out well-laid plans and required companies to address flaws in their GTM and customer experience at lightning speed. Analysts now say that 10 years of digital transformation is happening in one. In addition, companies looking to remove silos across their teams are dealing with a more distributed workforce – and customer base.

If there was ever a moment for your company – and revenue teams – to come together, it's now.



REVENUE ACCELERATION

HOW TO MOVE FROM ALIGNMENT TO ACTION

No person is an island. That's especially true when it comes to growing your business. In this chapter, you'll learn how companies can break down organizational silos to create more accountability across revenue-generating teams. We'll also introduce a playbook to set your teams up for success and accelerate GTM motions.

Organizational Friction & Why It's Hurting Your Bottom Line

Silos have always been a point of contention in B2B businesses.

Whole organizations were (and continue to be) run by departments ruled by different missions and revenue goals. And nowhere are these headaches felt more deeply than in marketing, sales, and CS.

“A good relationship between marketing, sales, and customer success looks like a tried and true partnership. These teams need to stop pointing fingers and take ownership around the revenue process and their role in driving that process. They need to identify strategic gaps and help one another bridge those gaps.”

**KATE ADAMS**

VP of Demand Generation, Drift

Customer journeys have become increasingly complex. A growing number of touchpoints and channels have made it harder – yet more important than ever – for companies to remain agile. But a lack of alignment across GTM teams is hurting outcomes.

Marketing, sales, and CS are now called on to work in lockstep in order to streamline experiences for customers and build a sustainable business of the future. One that is focused on digital and customer experiences.

Yet, many of these teams struggle to align and work alongside one another. And this internal friction is spilling out into their customer experience.

For that reason, two functions have become increasingly important to help companies remove friction: revenue operations and Revenue Acceleration.

What is Revenue Operations & Revenue Acceleration?

Revenue operations is the end-to-end-process of generating revenue. Revenue is not just an outcome, it's a process that can be optimized and streamlined.

“Teams and processes are more interconnected than ever. Companies that adopt the revenue operations mindset will be the ones that find ways to evolve and optimize their end-to-end revenue process. This agility, evolution, and team cohesion is a competitive advantage.”



KYLE COLEMAN

VP of Revenue Growth & Enablement, Clari

The purpose of **revenue operations** is to better align the entire revenue team with a consistent, real-time view of their business to inform action and optimize the revenue process. Revenue operations helps unify:

- **People:** Aligning marketing, sales, and CS
- **Data:** Connecting business and activity data across organizational silos and technology stacks
- **Processes:** Streamlining operational cadences and enablement across each team to drive consistency and repeatable wins

Revenue Acceleration is part of the revenue operations process.

Where revenue operations focuses on execution and aligning teams, Revenue Acceleration actions them. Revenue Acceleration provides the tactics and tools for marketing, sales, and CS to take action in their day-to-day work.



Both Revenue Acceleration and revenue operations have the same goal in mind: To introduce *full-funnel accountability* between the three revenue teams and focus on providing more value to customers.

“Instead of seeing marketing, sales, and customer success as three separate entities with unique goals (demand, new business, customer health, and retention), with Revenue Acceleration, they’re a unified team. This revenue team helps customers achieve the value they expect from your brand.”



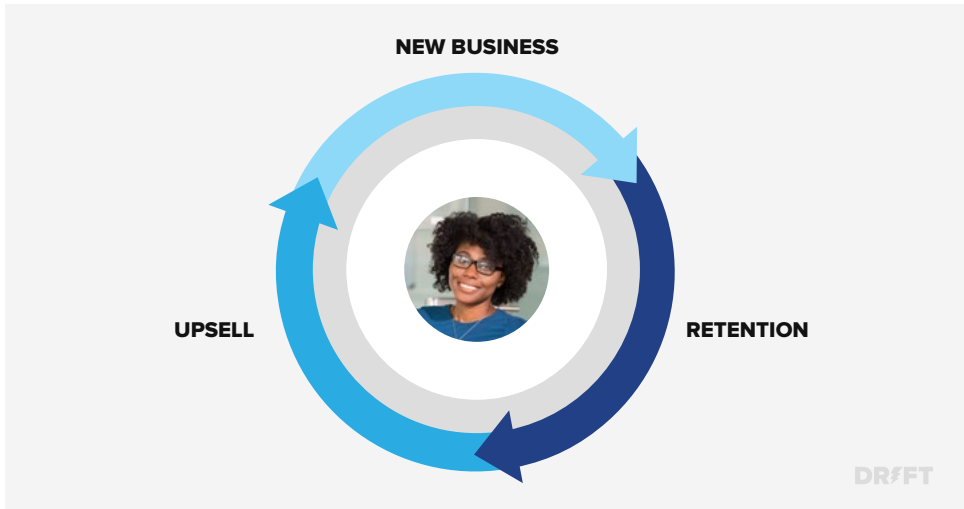
JULIE HOGAN

VP of Customer Experience, Drift

According to a study by **SiriusDecisions**, companies that align their revenue teams experience 15% higher profitability and 19% faster revenue growth. Companies that use revenue operations to accelerate revenue are able to do so because they are on the same page, act on the same insights, and are motivated by the same goals. In other words, they have *full-funnel accountability*.

One of the best ways to get these teams on the same page? Rallying them around the customer. After all, **84% of B2B sales** start with a referral – meaning a good customer experience is worth its weight in gold.

Customer lifetime value (CLV) is a key metric used to tie marketing, sales, and CS to both the customer and revenue. These teams each own a revenue segment that impacts the experience and success of CLV.



But revenue teams also need to have a “common view” or “shared truth” of their customer lifecycle and pipeline – and understand how they impact the metrics that matter.

Once teams have a single source of truth around data, instead of debating who's got the right number or why the data doesn't match up, you can proactively take actions that allow you to:

- Identify deal risk and upsides
- Accelerate current quarter pipeline
- And accurately predict revenue early in the quarter as well as forecast future quarters

Once you have a single source of truth (your pipeline and forecast) and are able to **prescribe next steps**, your company can start looking two, three, even four quarters out.

To help create more predictability in your revenue process across marketing, sales, and CS, next we'll share our framework and model for revenue operations and Revenue Acceleration.

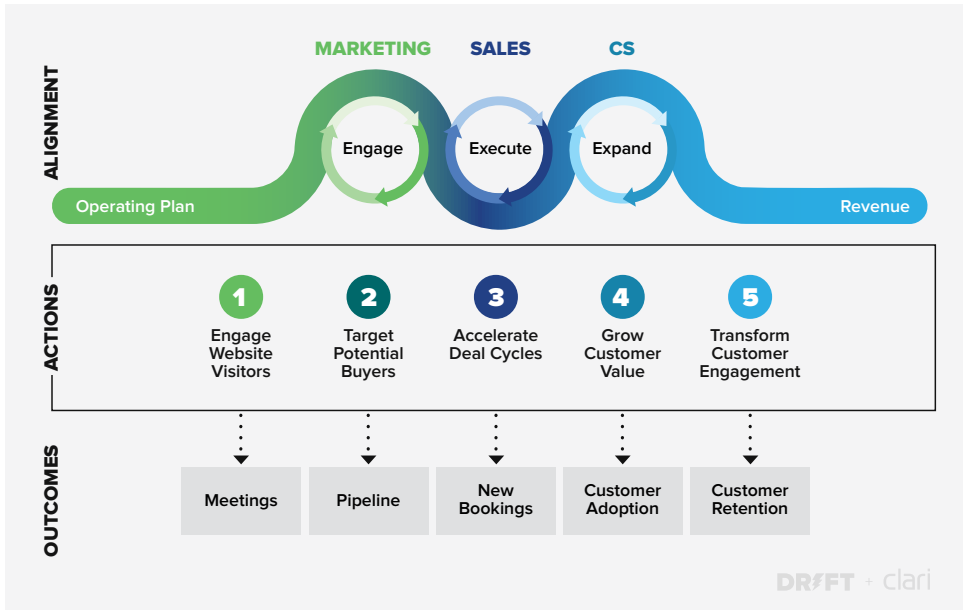


Once you have a single source of truth (your pipeline and forecast) and are able to **prescribe next steps**, your company can start looking two, three, even four quarters out.

Accelerating Revenue with a Revenue Process Playbook

Unless you have the right framework in place to guide and prescribe next steps for revenue teams, you're still introducing elements of unpredictability into your pipeline.

So Clari and Drift are sharing their frameworks for aligning and actioning revenue teams around the customer.



As shown in the image, this framework is broken down into three parts. The first is *alignment*.

Here we see the [**Clari Revenue Operations Framework**](#).

This framework begins by defining your company's operating plan. An operating plan is where your revenue goals are set by company leaders and should be visible to the rest of the organization. Operations works with finance to create a master document that serves as the basis for all marketing, sales, and CS goals for the whole year.

From there, you have three main phases:

- **Engage:** In this phase, revenue teams – especially in the marketing function – need to make sure they're targeting the right accounts with the right campaigns. The sales development (SDR) team should also be actively prospecting into accounts with the right messaging for the right personas. The teams at this stage are focused on the top-of-funnel pipeline plan.

- **Execute:** Here, you enable your sales team through coaching and guidance to convert that pipeline to close. This stage includes all the rep/manager one-on-ones, pipeline reviews and **forecast calls** throughout the quarter (to evaluate current quarter execution against targets), and pipeline build for future quarters.
- **Expand:** The expand phase is where you retain customers and grow your footprint within those accounts. Specifically, CS is focused on product usage, customer retention, and finding white space for expansion within accounts. CS delivers the current and next quarter churn forecast against net retention targets.

“Invest in tools, technologies, and processes that ensure you’re reaching the right people at the right accounts at the right time.”



KYLE COLEMAN

VP of Revenue Growth & Enablement, Clari

Next, we move into *actions*. This is where Drift’s **Revenue Acceleration Model** comes into play. These are the high-level process steps used to move buyers and customers through the funnel:

- Engage with buyers/website visitors
- Target potential buyers
- Accelerate deal cycles
- Grow customer value
- Transform customer engagement

Depending on the structure of your teams, these actions may overlap between marketing, sales, and CS. For example, if account managers and responsibilities around expansion live under the sales function versus CS, then “Grow customer value,” toes the line between sales and CS.

“Historically, there has been a lot of feuding between marketing, sales, and customer success about who is contributing to revenue and responsible for driving the numbers. With revenue operations and acceleration, you can bring together the measurement and metrics to ensure a single flow of processes, technologies, and data.”



TRICIA GELLMAN

Chief Marketing Officer, Drift

Finally, we land on *outcomes*. Outcomes are the endpoint objectives your teams are trying to achieve at each stage. These outcomes should focus on moving buyers and customers through the funnel effectively.

In the next few chapters we'll walk through these unique processes in detail, as well as:

- The responsibility of marketing, sales, and CS in accelerating revenue and growing CLV
- What metrics revenue teams should measure their performance against
- How companies can use data to action revenue teams
- Best practices for targeting and engaging buyers in an increasingly digital world
- And how SDRs and enablement should be rolled out to streamline GTM motions

Learn more about this framework from the Drift and Clari teams here: [Why a Revenue Team is Your Key to Unlocking Your Full Revenue Potential](#)

ENGAGE

HOW MODERN MARKETERS GENERATE AWARENESS & DRIVE MEETINGS

The rise of ABM has resulted in marketing campaigns that are more targeted, personalized, and relevant to buyers. Yet, many marketers still struggle to track the ROI of their efforts. In this chapter, we're sharing how to build and measure a marketing machine that creates better buyer experiences, drives meetings, and increases pipeline.

Defining Marketing Metrics & KPIs

Marketing teams ruled entirely by lead generation often suffer from three pitfalls:

Lead quality issues

Volume is important, but so is lead quality. Many B2B businesses are now using [account-based marketing \(ABM\)](#) to better target ICP accounts and craft more effective campaigns.

Poor pipeline forecasting

If you have poor lead quality, your [pipeline forecasting](#) will most certainly suffer. Given that forecasting improves accountability, this is a huge hurdle to overcome in order to achieve cross-team alignment.

An inability to effectively prove ROI

Leads alone don't move the needle. Marketing needs to show its [impact on the business](#). By focusing on engagement and meetings, it's easier to understand tangible ROI.

So what specific metrics and KPIs should your marketers focus on?

While some metrics depend on whether or not SDRs sit in marketing (more on that later), here are the high-level metrics we recommend to keep marketing accountable:

- **Quarter-to-date pipeline created:** This is volume. As mentioned, volume does still matter and it trickles down to impact how other teams perform.
- **Quarter-to-date pipeline quality:** High intent or ABM accounts typically fall under here.
- **Pipeline acceleration/sales velocity:** Speed matters at every point in your funnel. How can you improve coverage and visibility on high-intent channels? How can you streamline self-service so potential customers can move through the funnel faster? How can you make it easier for sales to connect with buyers?
- **Target account engagement:** Different KPIs will feed into this – from meetings booked to events attended to conversations had.
- **Future pipeline coverage:** This is the sum of your current sales opportunities compared to the revenue targets in your operating plan.

“Marketing teams have focused too much on lead **generating acronyms** to measure success. At Drift, our whole mantra is ‘get closer to the customer.’ That means we need to measure our success by how effectively we do that. We believe this more human approach will rule marketing and sales of the future.”



KATE ADAMS

VP of Demand Generation, Drift



Here are some example KPIs that would feed back into your high-level metrics:

- Decrease lead follow up time by 50% by EOQ
- Increase meetings booked rate by 25% by EOQ
- Increase conversations on product pages by 40% by EOY
- Increase conversions from paid ads by 20% by EOY

Your top-level KPIs should focus on improving the metrics above and:

- Engaging with buyers/website visitors
- Targeting potential buyers

Using this approach marketers can work backward to identify how their contribution impacts quarterly goals.

“The key success metric at the top-of-the-funnel is qualified pipeline – the dollar amount of the opportunities that sellers have validated and accepted into their pipeline. This is the right balance between what marketing can control and what sales actually cares about. Sorry MQLs, sales doesn’t care about you.”



KYLE COLEMAN

VP of Revenue Growth & Enablement, Clari

Understanding Your Target Audience

Having a firm grasp on your ideal customer profile (ICP) is key to everything from the campaigns you run to the messaging you use to the channels you invest in. Most likely you've already defined your **ICP** with sales and shared this with the rest of your company. But understanding pain points, personas, and company profiles is just the tip of the iceberg.

"A more robust and detailed understanding of what has happened, coupled with actionable insights about what's going to happen, offers a deeper understanding of your pipeline and its potential."

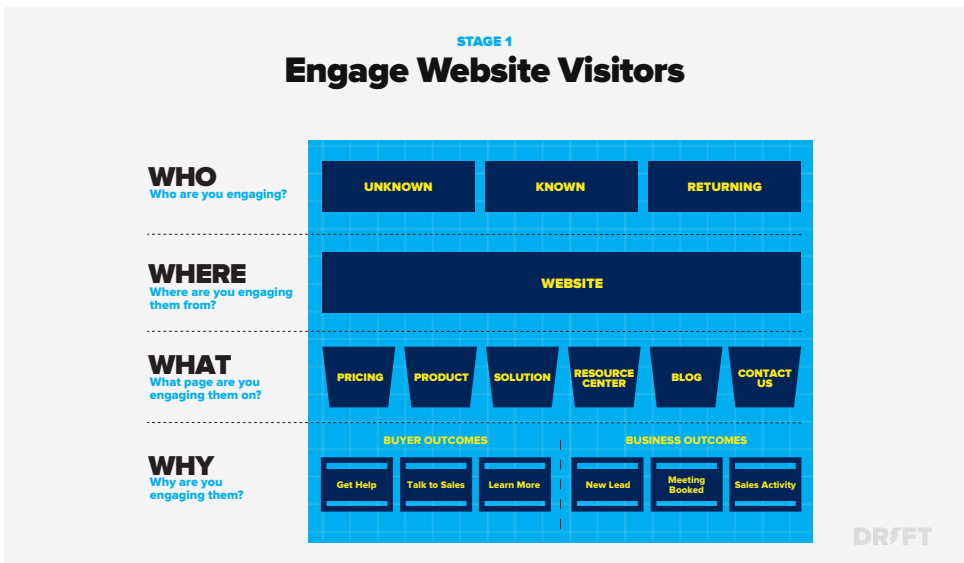


KYLE COLEMAN

VP of Revenue Growth & Enablement, Clari

You need to know your target audience at a detailed level if you want more engaging and high-converting conversations with buyers. This is a fundamental step of **Conversational Marketing**.

The goal of Conversational Marketing is to start a conversation with buyers. To add value to that conversation, you need to understand who your target audience is and how they found you.



Identifying the touchpoints in a buyer's journey is also necessary for delivering a catered and personalized experience. This is the “where and what” of the customer journey.

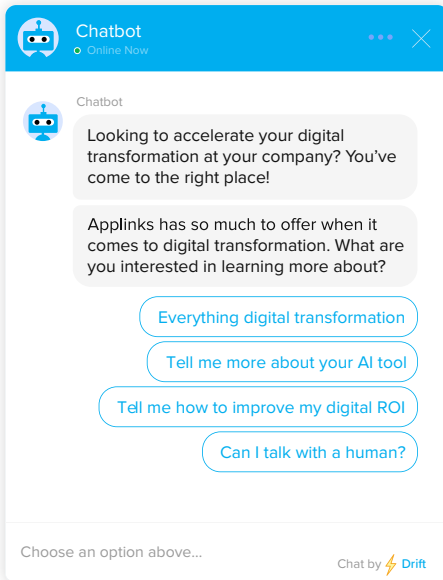
“People need efficiency. They need a convenient and cost-effective way to drive business in a completely digital world. Doubling down on digital transformation that enables real-time conversations is the new normal. Buyers and customers won't accept anything less.”



KATE ADAMS

VP of Demand Generation, Drift

The “why” is when we begin to engage with buyers. Most often these interactions can be split between buyer outcomes (research, help) and business outcomes (they're ready to conduct business with your company). The why will be a key turning point in navigating buyers/customers through your funnel and accelerating revenue.



Learn more about the four W's and how to use them:
[**The Conversational Marketing Blueprint**](#)

Nailing Engagement & Targeting: Right Time, Right Message, Right Place

81% of buyers conduct their own research before purchasing a product or reaching out to a company. A **majority of those buyers** expect companies to tailor digital experiences based on their past interactions.

“Today, people are juggling personal and professional time. They no longer have the patience or time to wait around to engage with you and your brand. You need to engage with buyers when they have the time and intent to engage with you or you risk not engaging them at all and missing an opportunity to build your brand and sell your solutions.”



TRICIA GELLMAN
Chief Marketing Officer, Drift

If you’ve done your research, you should have a good understanding of who your buyer is, where they’ve been, and what they’ve shown interest in. Your outreach should be catered and targeted around this information. You can measure successful engagement by three things:

Timeliness

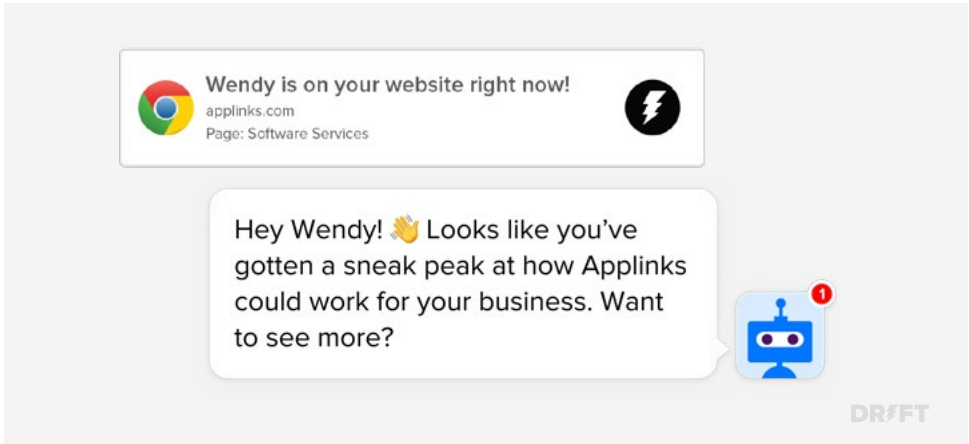
According to **Salesforce**, 71% of buyers expect companies to interact with them in real-time. This explains the boom in **AI-powered** chatbots over the last few years as businesses scale to a 24/7 world. Drift’s **State of Conversational Marketing** research found that chatbot usage has grown by 92% since 2019. To accelerate revenue and deal cycles, revenue teams must invest in channels that easily connect them with buyers.

Relevancy

Based on what you know about your buyers, how helpful is your marketing message? How easy is it for them to get what they want during an interaction?

Targeting

The level of **personalization** and the **type of outreach** you use should be dictated by segmentation. By segmenting your buyers into volume, target accounts, and top target accounts you can better prioritize your channels, budget for campaigns, and focus your energies for top target accounts.



“Relationships with today’s B2B buyers are much more direct. Buyers are crystal clear on their priorities. They have a clear set of criteria in order to justify any purchase. The seller’s role is to find out how their solution can solve the buyers’ problem despite these constraints.”



ANTHONY CESSARIO

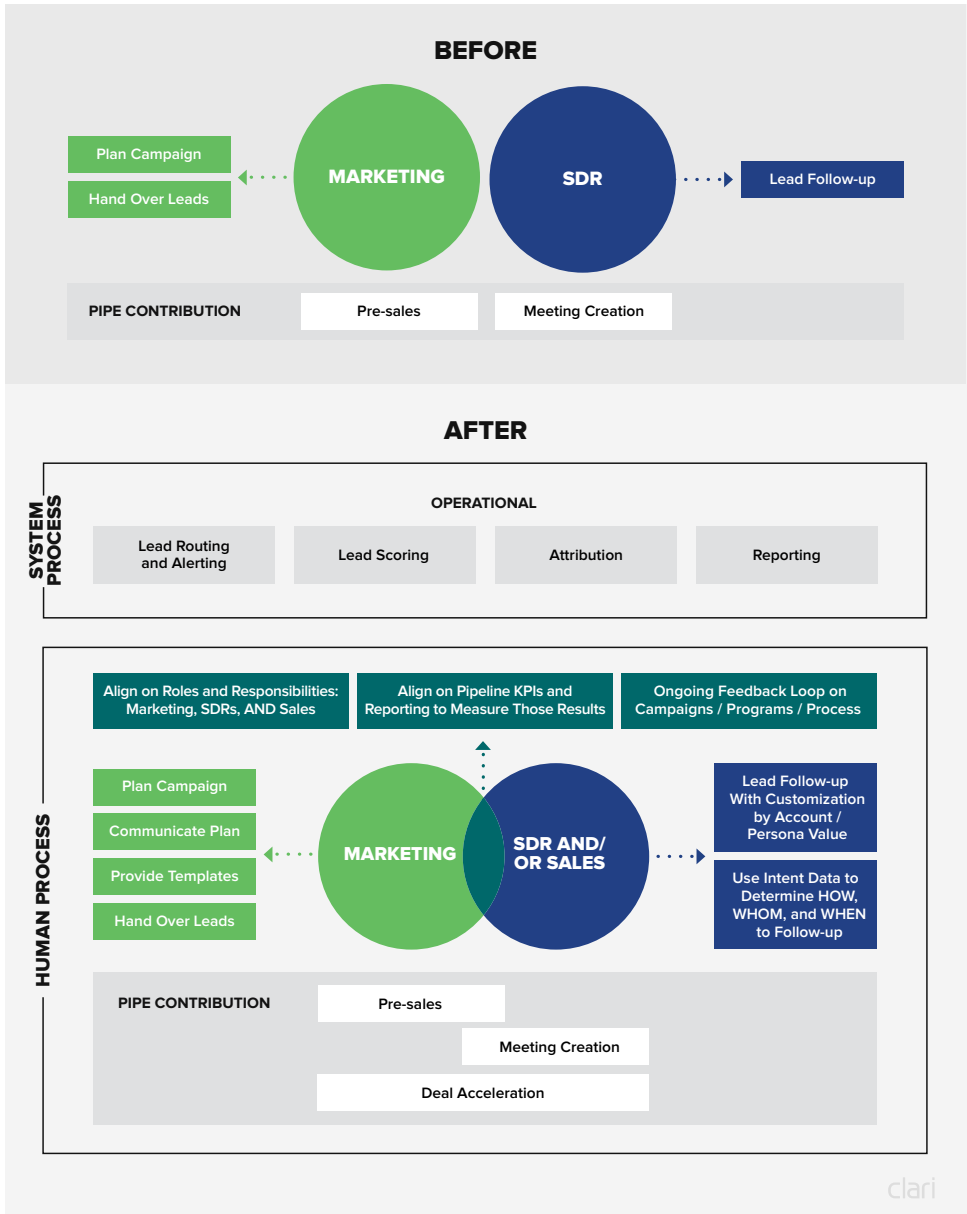
VP of Enterprise Revenue, Clari

The Role of the SDR in Accelerating Opportunities

It’s nearly impossible to talk about engagement without acknowledging the vital role of the **SDR**. SDRs work with marketing to follow-up and provide feedback on campaigns, align with sales on buyer research, book meetings, and so much more.

While marketing has the systems (MAPs) in place to filter leads and accounts to the right reps, **SDRs are essential** in accelerating deals and sharing anecdotal information back to the company.

Here we're sharing an illustration from Clari's Director of Growth, [Natasha Dolginsky](#), and Head of Revenue Development, [Alex Jagiello](#), on how SDRs should work alongside marketing and sales.



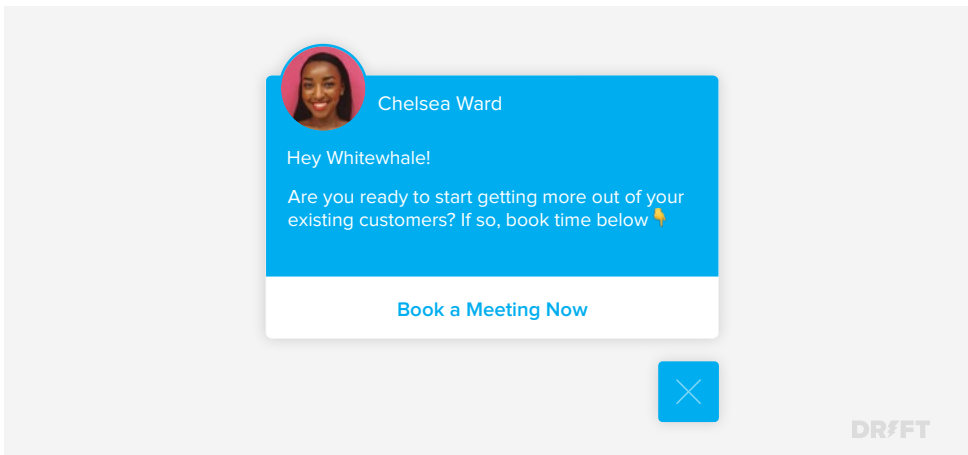
The before state shows a traditional marketing and SDR relationship, which lives outside of sales' purview. In an ideal world, marketing, SDRs, and sales are working alongside one another simultaneously. The after shows how coupling marketing automation, and aligning these three roles, helps accelerate pre-sales pipeline and meeting creation.

"The marketing, SDR, and sales relationship is a unique one. Time and time again I've seen that the success of that relationship hinges on a relentless commitment to communication and collaboration. One where marketing and SDRs are focused on pre-sales, SDRs and sales work together on booking meetings, and all three work in unison to accelerate deals to create a seamless and remarkable buyer experience."



NATASHA DOLGINSKY
Director of Growth, Clari

SDRs are essential in providing coverage for certain channels – from outreach on direct mail campaigns to live chat on high-intent web pages.



“Our role in marketing is about enabling the sales team to have better conversations with the right customers. It’s about giving them the offers and the turning point events that build a stronger business case.”



KATE ADAMS

VP of Demand Generation, Drift

Once an SDR has booked a meeting, it’s time to qualify buyers for sales. Many SDR teams use the BANT methodology to do this. BANT is a qualification framework that asks probing questions to identify right-fit buyers.



Establishing processes like this is important in nailing SDR to account executive hand-off. Identify a similar framework that is easy to execute so deals can move faster through your funnel.

EXECUTE

HOW HIGH-PERFORMANCE SALES TEAMS ACCELERATE PIPELINE TO CLOSE

The best sales team is a data-driven sales team. Why? Because to build predictable revenue you need a sales team that is confidently tracking and acting on performance metrics. In this chapter, you'll learn how sales can take a more systematic approach to forecasting, performance tracking, outreach, enablement, and more.

Defining Sales Metrics & KPIs

Looking once again at the revenue process playbook from chapter one, in addition to forecasting revenue results, two actions happen at the execute phase:

- **Targeting** potential buyers
- **Accelerating** deal cycles

To measure success at this phase, your metrics should show how effective sales are at these two steps.

“My biggest job as a CRO is meeting the high growth expectations of our board and marketplace. To do this, we must understand our entire funnel and make sure we are building the right pipeline to consistently meet or exceed targets. It also requires that we hire, scale, and enable sales teams to be highly productive.”



TODD BARNETT

Chief Revenue Officer, Drift

There are a number of standard metrics sales is accountable for both at the team and individual rep level. Here are a few **key sales metrics** most commonly tracked on sales teams (we tried to keep these somewhat industry-agnostic):

Monthly recurring revenue (MRR)/Annual recurring revenue (ARR)

MRR/ARR is the contracted monthly or yearly revenue of your company.

Quota attainment

This metric is the number of closed deals (or revenue) in a given time period against the chosen quota for that time period.

Win rate

This is the percentage of closed/won deals. Win rates are useful for tracking sales performance over time and for forecasting how much pipeline coverage your sales team needs to hit targets.

Sales forecasting accuracy

Arguably the most important number in a business, the sales forecast determines how a company invests and grows. This has a massive impact on company valuation. The more accurate your sales forecast is, the better you can plan, invest, and grow your business.

Conversion rate

How good is your sales team at turning opportunities into new business? That's what this metric helps answer.

Pipeline coverage

Tracking pipeline coverage helps keep sales performance on track. Getting an accurate picture of pipeline coverage will help sales management identify red flags.

Sales cycle length

To accurately forecast, it's important to track how long it takes sales to close business. We suggest going even more granular to identify how long a deal takes at each stage.

Average deal size

This indicates the total revenue per closed deal. If you're looking to grow sales and move further upmarket, tracking deal size is necessary.

Sales activity (productivity)

Sales activity is a good indicator of deal velocity. It tells you whether or not an account is actually engaged and the level of engagement in an opportunity. In today's uncertainty, it's one of the only true ways to measure the health of a relationship with an account or whether a deal is likely to close.

Sale linearity

Sales linearity is when revenue teams close opportunities in a predictable pattern throughout the course of a quarter. Linearity gives sales a better chance of hitting their numbers by avoiding the last minute rush at the end of the quarter to sign contracts, get approvals, and maneuver through logistical roadblocks.

Deal slippage

Slippage rate is the percentage of opportunities that were in commitment at some point, but then failed to close within their forecasted period. When you track slipped deals you can easily identify them and create action plans to close next quarter. Understanding your slippage rate provides some level of predictability to your sales forecast.

Next quarter pipeline

Some of the most advanced companies we've seen spend at least half of their quarter looking at out-quarter metrics to better predict where they will land – and how to prepare for it.

Keeping a disciplined eye over sales metrics is important to sustainable revenue growth, forecasting, and consistent sales performance.

“Both teams need a more nuanced understanding than ever before of pipeline coverage requirements for the different GTM motions that are in play. Gone are the days of using a 3x or 4x coverage target. The revenue process is much more dynamic than that.”



ANTHONY CESSARIO

VP of Enterprise Revenue, Clari

Another important piece of targeting buyers effectively and accelerating deal cycles? Streamlined enablement and coaching programs.

Learn more about these sales metrics and others here:
[**15 Sales Metrics Every Revenue Leader Should Track**](#)

Embracing Sales Enablement & Coaching

What’s the secret behind high-performing sales teams? Two things: an incredible enablement program and continuous [**sales coaching**](#).

In this section you’ll learn how to master both.

How to Run a Best-in-Class Sales Enablement Program

[**Revenue enablement**](#) is a new field that – like revenue operations and acceleration – looks to align and action revenue teams. This emerging profession has been spearheaded by organizations like [**SiriusDecisions**](#), who define revenue enablement as “...a discipline that seeks to bring the skills, knowledge, assets, and process expertise to all customer-facing roles – thus helping them to maximize every buyer or customer interaction.”

As the definition implies, [**sales enablement**](#) lives under the umbrella of revenue enablement.

According to Highspot’s [**State of Sales Enablement Report**](#), sales enablement adoption has increased by 343% in the last five years alone. For companies looking to streamline their GTM strategy and action revenue teams, sales enablement is essential. It brings together the content, information, expertise, and tools sales needs to sell more effectively.

“Sales needs to be trained on how to help customers understand their pain, uncover that pain, and tie that pain back to a company's solution. They also need to learn how to create urgency. The more urgency you can create in the sales process, the better. Enablement is the knowledge base driving those valuable conversations in a consistent and repeatable way.”



MARK KILENS

VP of Content & Community, Drift

So what does good sales enablement look like?

Depending on the structure of your sales team, enablement covers a spectrum of roles. In this table, we see how enablement is embedded in the employee lifecycle, the desired outcomes of an enabled and empowered sales team, and the targets/metrics that define their success.

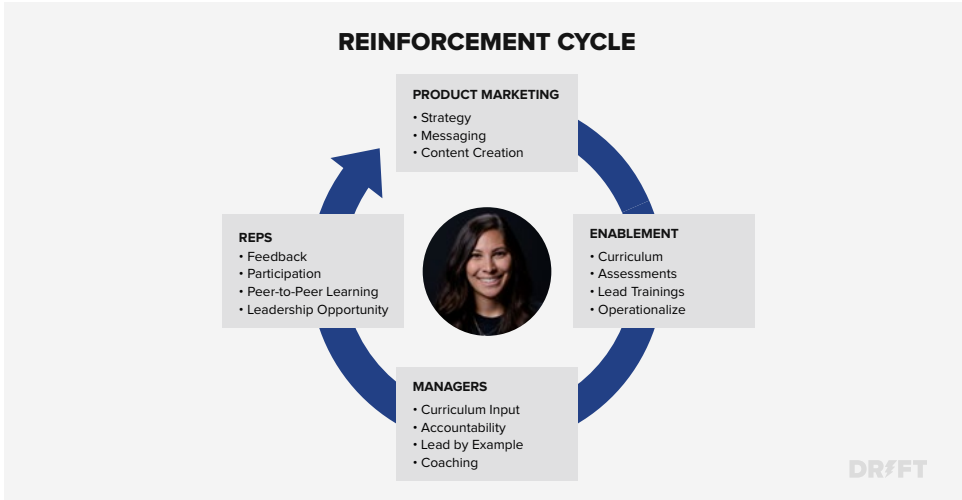
SERVING	Account Executives			Account Managers		Sales Managers		
	PLAYS					TARGETS		
	1. Equip: Equip sales reps with the resources, tools, and education they need to succeed. 2. Develop: Develop sales reps so they sell effectively with a matured approach. 3. Close: Provide deal support to help sales reps close deals.					1. NPS 2. Quota Attainment PPR 3. \$X M ARR from Deal Support		
RESPONSIBILITIES	Onboarding		Sales Process & Methodology		Sales Playbooks		CRM	Sales Tools & Technology
	Sales Content		Ongoing Training & Development		Competitive Intelligence		QMP	Deal Support

DR/FT

DR/FT

But sales enablement doesn't just fall on the shoulders of a revenue enablement team.

Cross-collaboration is key. Here we see a sales enablement reinforcement cycle. It spells out the teams involved in executing a best-in-class enablement program, as well as the responsibilities within these teams.



Investing in sales enablement ensures reps are ramped up for GTM, aligned on process, and empowered to make buyers successful.

How to Improve Sales Effectiveness Through Coaching & Deal Inspection

If you want a world-class sales team, you must invest time and resources in coaching. In fact, the [Sales Executive Council](#) found that effective sales coaching improves long-term sales rep performance by more than 19%.

One of the best ways to ensure effective coaching is through one-on-one meetings with managers and sales reps.

The purpose of a [one-on-one meeting](#) is not to interrogate reps. These meetings are meant to be collaborative, strategic, motivating, data-driven, and tactical. Managers work with reps on deal execution, discuss current roadblocks and how to resolve them, and strategize next best steps.

To make the most of this time and leave reps feeling motivated (not interrogated), managers should use a **four-point deal inspection** approach to assess the health on ongoing deals.

This approach limits deal inspection to a series of four questions:

- What's changed in the deal?
- How likely is the deal to close?
- How much activity do we have on this deal?
- Is this deal following our sales process?

"If you know these four data points on every deal your team is working, you can avoid the tire kickers and focus on the right deals."



BEN CHEN

Sales Engineering Manager, Clari

However, we all know that time is money — and when reps have dozens of deals in play, the time it takes to review each of them can be costly. The key to an effective deal inspection is having a single source of truth with real-time data allowing you to identify and prioritize the opportunities that need the most attention. This gives managers and reps time for other important aspects of sales coaching.

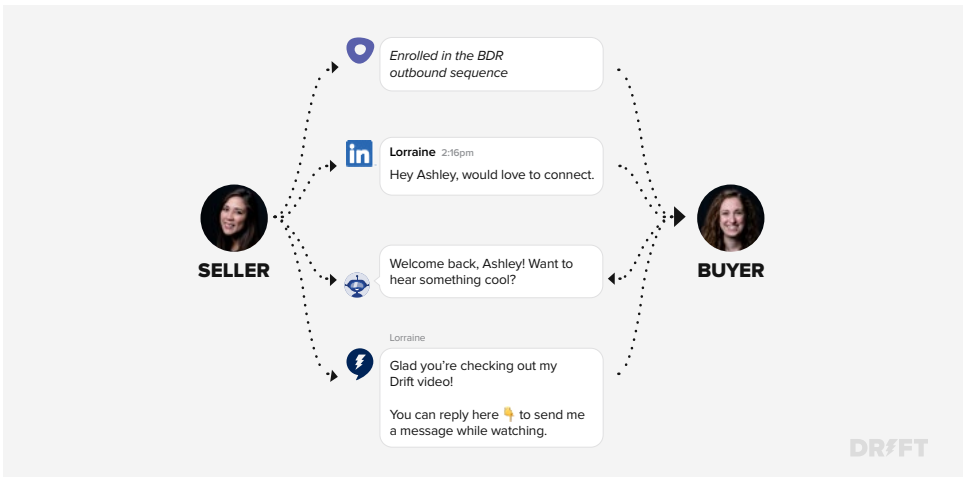
Learn more best practices on one-on-one sales meeting here:
[The Sales Leader's Guide to Mastering One-on-One Sales Meetings](#)



In an increasingly virtual marketplace, sales leans heavily on digital channels and platforms to target the right buyers at the right time and with the right message. While digital transformation has made it easier for sales to connect with buyers, it has also introduced a new challenge: how to get sales to focus on what matters.

Leveling Up Targeting & Outreaching

In an increasingly virtual marketplace, sales leans heavily on digital channels and platforms to target the right buyers at the right time and with the right message. While digital transformation has made it easier for sales to connect with buyers, it has also introduced a new challenge: how to get sales to focus on what matters.



While **ABM** is a good way to target VIP accounts, creating target account lists is often done manually and after-the-fact – without consideration for new and emerging segments showing interest now.

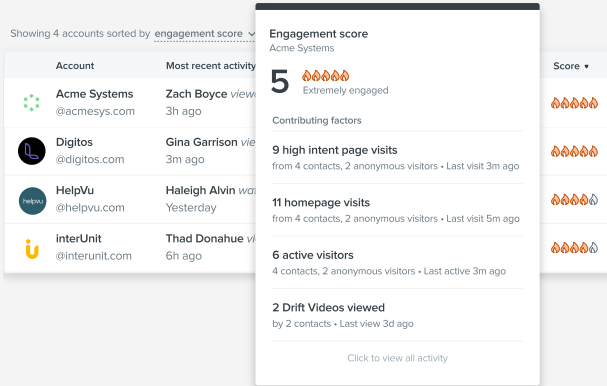
“To create a great company, the CRO and CMO need to be aligned on their go-to-market – from messaging to pricing to the personas we sell to – to how we segment and package the product. Great companies and great revenue teams are aligned and actioned in every aspect of a go-to-market strategy.”



BY **TODD BARNETT**
Chief Revenue Officer, Drift

In the revenue era, focus on both connecting with buyers in real-time AND **actioning sales** (and other revenue teams) in real-time to drive value.

Once you’ve ramped up sales, it’s time to look at driving engagement in these accounts.



Source: Drift, Engagement Score in Drift Prospector

DRIFT

“When growing a sales organization, there are two key themes you should focus on: capacity and engagement. It’s critical that reps, their leaders, and all supporting GTM teams are quickly focusing their collective resources on the business segments where they can make the most impact.”



ANTHONY CESSARIO

VP of Enterprise Revenue, Clari

Conversational Sales is the other side of the Revenue Acceleration coin. Like Conversational Marketing, Conversational Sales is about creating more conversations with buyers to grow revenue. This means cutting out the middle man – whether it be forms or long follow-up times – to start meaningful conversations in real-time.

But what does a “meaningful” conversation look like? In a word, “empathetic.”

At Drift, we like to say “helping is the new selling.” And this continues to be true not just in more personable marketing content, but in sales outreach as well.

Learn more about using empathy in your sales outreach here:
[**5 Email Templates to Make Your Sales Outreach More Empathetic**](#)

Conversational Sales takes an empathetic and buyer-centric approach to engagement. Here's what that looks like:

- **Understand what buyers want.** Outside of the information marketing and SDRs have gathered, what else do you need to know? Ask buyers to clarify and elaborate.
- **Be present and use active listening.** Don't steam-roll a conversation with your own narrative. Let your buyers speak first. Respond in kind with answers that show you're listening.
- **Be passionate.** If you're not fired up, your buyers won't be either. Positivity and enthusiasm are contagious. Use them.
- **Answer all of your buyer's questions.** Don't lead with vague responses that may stall a deal further down the line. "I don't know, but let me find out for you," is a perfectly reasonable response. Just make sure you find the answer and follow up quickly.
- **Be transparent.** Share what you're doing on your end to help the buyer and what next steps will look like.
- **Share examples.** People want to see real-world results. Have customer stories on tap, and if possible, examples from a given buyer's industry or pain point perspective.
- **Help the buyer buy and sell internally.** Help them navigate the buying process and champion your product/service.

Another important job for sales? Ensuring a seamless transition between them and customer success. The customer doesn't want to feel like they are starting from scratch. They want a seamless transition. Sales and CS must find a way to transfer knowledge without being a big burden on the outgoing rep who is likely eager to move on to the next deal.

Learn more about Conversational Sales here:
[**Conversational Sales Handbook**](#)



Given B2B accounts have multiple decision-makers, developing a process to measure sentiment with each contact is critical. That way you can see potential churn ahead of time instead of relying on anecdotal feedback that's too little too late.

EXPAND

HOW BEST-IN-CLASS CUSTOMER SUCCESS RETAINS & GROWS ACCOUNTS

Business leaders are now calling customer experience the “third growth funnel.” Today, customer experience (CX) and customer success (CS) have emerged as key functions for driving retention revenue and creating customer relationships that last.

Defining Customer Success Metrics & KPIs

Both CS and CX were created in response to B2B businesses taking a more active role in growing customer relationships, retention, and experiences.

While there are a number of [metrics your CS and CX teams](#) can measure and act on, here are the ones we consider critical:

Customer churn %

There are three types of churn to measure in a business. Customer churn is the percent of customers who leave you at the end of a time period against the customers you had in the previous time period. This could be tracked monthly, quarterly, and yearly.

Revenue churn %

This is the revenue lost from churned customers (and down-selling) at the end of a time period against the revenue from a previous time period.

Net dollar churn %

This is the revenue lost from churn and down-selling, plus gains from expansion revenue. This indicates how expansion revenue offsets revenue churn.

Expansion revenue %

This is all of your new revenue from upsells and cross-sells for a given time period divided by the revenue at the end of the previous time period.

Gross revenue retention

This is the annual revenue loss from churned customers. This metric does not take into account upgrades, cross-sales, up-sales, etc. This number shows the health of your company's growth rate.

Net revenue retention

Net retention is the total revenue (including new business, upgrades, cross-sales, and up-sales) minus any revenue churn (including churned customers and downgraded customers). This is tracked over a fixed period. Sales and CS both track this, but typically this metric is owned by CS.

of Quarterly Business Reviews (QBRs)

QBRs are quarterly meetings between a customer's decision-makers/primary contacts and your business. Their purpose is to realign on your customer's strategic targets and discuss how your business will support them. QBRs are also a good touchpoint for requesting referrals or reviews.

Net Promoter Score (NPS)

There are a number of sentiment-based metrics out there. **NPS** is the most popular for understanding overall loyalty (vs. satisfaction at a specific transactional moment). **NPS** surveys ask: "On a scale from 0 to 10, with 10 being extremely likely, how likely are you to recommend <COMPANY> to a friend or colleague?" These surveys are best sent on a quarterly basis or before a QBR.

Customer Satisfaction Score (CSAT)

CSAT is great for measuring satisfaction at specific touchpoints (for example, how satisfied a customer was after a support call). In a CSAT survey customers are asked: "How would you rate your overall satisfaction with the [goods/service] you received?" This is measured on a 1 to 5 point scale, with 5 being "extremely satisfied."

Having a clear understanding of CS's impact on a company's bottom line is critical. But understanding the why behind the retention and churn numbers you're seeing is just as important.

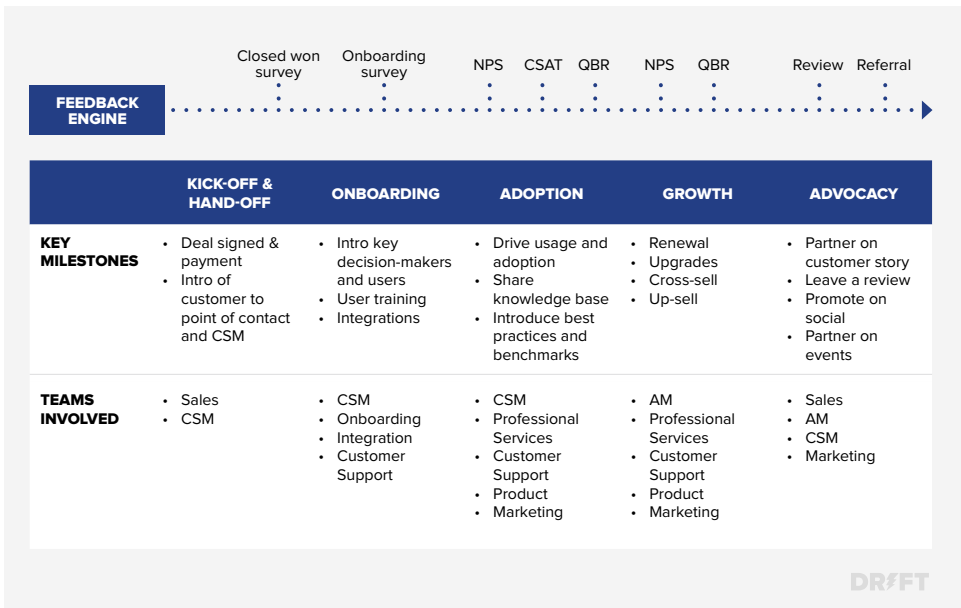
“The three key metrics we track that directly affect revenue are gross retention, net retention, and churn. But these metrics are just the starting point. For example, for churn we will try to understand the reason for churn and then break it down between addressable and non-addressable factors. From there, we can build playbooks to mitigate future risk and inform our company and product strategies.”



AMY JOHNSON

VP of Customer Success, Clari

Both CX and CS need to keep a pulse on customer relationships as they mature over time, in addition to retention metrics. Below we’ve included an illustration of a post-sale customer journey. At the top level is your feedback engine, this includes metrics like NPS and CSAT, as well as other feedback avenues like QBRs, other surveys, reviews, and referrals.



Given B2B accounts have multiple decision-makers, developing a process to measure sentiment with each contact is critical. That way you can see potential churn ahead of time instead of relying on anecdotal feedback that’s too little too late.

Embracing CSM Enablement & Coaching

CSM enablement, like sales enablement, is all about arming your CS and customer-facing teams with the processes and information to make customers successful.

CSM enablement teams are focused on creating internal certification programs and developing content and knowledge around:

- CSM's GTM processes
- Products/services
- Creating more value for customers
- Persona research
- Conducting QBRs
- Driving expansion revenue

Similar to sales enablement, CSM enablement is not run in isolation, and relies on team managers, product marketing, and others to run the enablement engine.

“CS enablement is about equipping CS with the right training and content to use with customers. CS enablement is also about customer enablement, and giving customers the tools to self-service their own learning. This includes training, certifications, knowledge bases, education within your product, and more. At the end of the day, the more you can do to make your customer successful faster, the better chance you're going to have at increasing customer lifetime value.”



MARK KILENS

VP of Content & Community, Drift

When it comes to accelerating revenue, investing in CSM enablement is just as important as investing in sales enablement. CS is not only tasked with putting the best face forward for your brand, but driving additional expansion revenue to increase CLV. As such, any enablement program that doesn't give equal investment to CSM and sales is incomplete.

Growing Customer Value & Retention

To grow customer value and retention, you need to change CS from a reactionary team to a proactive, prescriptive, and predictable team.

“The role of customer success is critical for customer growth. When customers purchase, customer success keeps the momentum and excitement they have for your solution, and focuses on driving them to successfully set up and start seeing value as soon as possible. By enabling this value early, you set the relationship up for success and fast-track opportunities for platform adoption and expansion-based growth.”



JULIE HOGAN

VP of Customer Experience, Drift

In the next few sections we'll discuss what that looks like.

Proactive

A proactive approach to CS implies that your reps are actively connecting and reinforcing your business value to customers. CS should be running a multitude of plays to increase retention, adoption, advocacy, and expansion. These plays include:

- **Rehab plays:** Plays here focus on turning unhealthy customer accounts into healthy ones.
- **Re-onboarding plays:** In this play, there may be a new point of contact (POC) that needs onboarding, or a customer that needs a bit more training and enablement.
- **Resell plays:** This play often involves losing an initial POC and champion. This requires CS and sales to sell to an account (again) internally to reestablish a business case.
- **Expand plays:** Expansion plays focus on driving up-sell, cross-sell, upgrades, and more.
- **Ghosting plays:** Ghosting is a major headache in CS. In this play, CSMs work to reestablish contact with an account that has gone silent.

CS should work with marketing to create campaigns specifically for customers around these different plays.

“It’s important to understand the different superpowers of your sales and customer success team – and ensure your roles, responsibilities, and processes allow for those to shine. For example, if sales is focusing on the commercial aspects of a relationship, then CS can focus on driving value and adoption.”

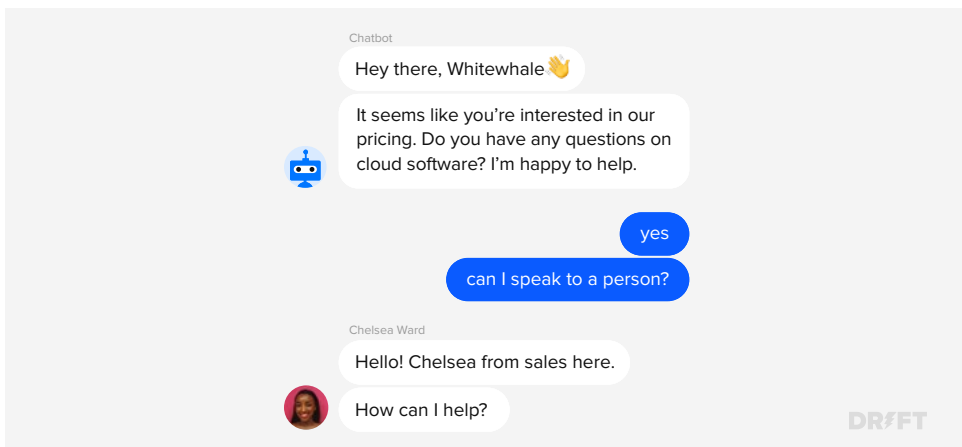


AMY JOHNSON

VP of Customer Success, Clari

Engagement here is key. CS should start conversations with customers on their terms and make it easy for customers to reach out in real-time or answer their own questions through self-service.

Additionally, you should understand where your CSMs are spending their time and identify if certain accounts are being neglected so you can take action. Do this by looking at activity metrics and **account engagement**.



Prescriptive

Whether done in unison with professional services or not, your CSMs should be well-trained consultants and experts on your products and services, industry, and customers’ industries.

By understanding your customer’s business AND your product, CSMs can be prescriptive and identify the best steps to create more value for customers. This is where CSM enablement becomes so important. Through training and certifications, companies create in-house expertise and a more consistent customer experience across the board.

Predictive

What does potential churn look like? What customer accounts have opportunities for expansion? How can CS leaders forecast churn and retention more effectively?

Just as marketing and [sales forecast](#) for future pipeline, so too should CS. Earlier we mentioned the importance of looking at three different types of churn: customer churn, revenue churn, and net dollar churn. These metrics are key to forecasting accurately based on historical trends.

OWNER	RENEWALS
Jason White	Churn Forecast
Q1 ENDS IN 31 DAYS	
Churn Forecast ⓘ	\$2,200,000
Updated 2 days ago by Jason White	
Team Rollup ⓘ	\$2,000,000
📈 OPPORTUNITIES	View Deals
☒ Total ⓘ	\$3,585,000
☐ Closed ⓘ	\$0

Source: Clari, [Customer Success Forecast Example](#)

clari

Technology like machine learning can help more accurately forecast future churn. However, if machine learning isn't in the cards right now, CSM and renewal managers can work in unison to identify red flags well ahead of time – as well as expansion opportunities.

Here are a few best practices to improve forecasting, mitigate future churn, and follow-up on growth opportunities:

- **Notate churn reasons.** Require CSMs to record churn reasons when an account has churned. Ideally, you would use a picklist in your CRM to better aggregate this historical data further down the line.
- **Define healthy customer benchmarks.** Have defined metrics around what a healthy customer account looks like. What activities have healthy accounts executed in the past? Scale those metrics across your business segments (small to medium–businesses to enterprise accounts). Use these health metrics as benchmarks to measure against.

- **Segment customers.** Use benchmarking information to segment your customers into opportunities for potential growth, healthy accounts, and at-risk accounts.
- **Have CSM and renewal managers work in lockstep.** Keep an open line of communication between renewal managers and CS as a renewal date approaches. Add an automated reminder when this renewal is coming 90 days before so you can go through the customer health benchmarks. Manage renewal and expansion opportunities with the same rigor as your net new deals. Create visibility into the status of the deal and proactively spot risk.
- **Send a survey prior to renewal.** Send an NPS survey to an account before a renewal to pulse check sentiment. Raise any key issues prior to the renewal date.
- **Create next steps for churn and expansion.** Identify triage tactics for high-risk accounts. And operationalize next steps for growth opportunities.

Investing in technology to streamline and automate these tasks make it easier to identify churn and opportunities. However, these steps will let you work within your means to position CS for success.

CS should also be practicing extreme empathy with their customers – especially during times of uncertainty. Not only does this help build lasting relationships, but more predictive outcomes and opportunities.

“Leading with empathy has been a core part of how we handle challenges that come our way. Our customer success team is focused on using the constraints of our ‘new normal’ to get more creative in providing value to our customers. This has opened up additional opportunities to engage with customers.”



AMY JOHNSON

VP of Customer Success, Clari



There's a better way to revenue. That new way requires a new thinking – an understanding that revenue is so much more than a mere outcome. It's an end-to-end business process that can be optimized, streamlined, and automated.

FINAL THOUGHTS

REVENUE IS A PROCESS



BY **ANDY BYRNE**
CEO, Clari

Whether we're talking about revenue operations or Revenue Acceleration, one thing is clear: Revenue generation is the most important activity in any B2B company.

There's just one problem: Few teams view revenue as an end-to-end business process that can be streamlined and optimized for efficiency. For most companies, this process remains disconnected, inefficient, and unpredictable, managed with a DIY hodgepodge of spreadsheets, stale reports, inconsistent manual processes, and communications that aren't tracked anywhere.

As we've seen in this book, there's a better way to revenue. That new way requires a new thinking – an understanding that revenue is so much more than a mere outcome. It's an end-to-end business process that can be optimized, streamlined, and automated.

And it's more important than ever before. The CEOs, CROs, and board members we talk to – at both publicly-traded or privately-held companies – are all looking for answers to the same questions:

- How can they get more confidence in their revenue generation process?
- How can they better predict how their revenue teams will perform?
- What can they do to ensure accurate sales forecasts in order to drive more predictable revenue?

When revenue leaders can accurately predict where they will land at the end of this quarter, the next quarter, and the quarter after that, they can effectively invest and grow the business.

While every conversation differs, the conclusions we reach are remarkably similar. They all center around the idea of having the right alignment, the right instrumentation, and the right rigor across your end-to-end revenue operations and acceleration process.

As more businesses strive for that renewed revenue confidence in this uncertain market, alignment across the entire revenue generation team will be essential.

We hope this resource proves invaluable in planning your GTM motions now and in the future. Let's briefly recap what we walked through:

- With revenue operations, businesses can double down on internal revenue processes that work alongside new tech.
- Once a clear process is in place, Revenue Acceleration enables revenue teams to connect with buyers and customers in real-time across channels.

As more businesses look to streamline their customer experience, getting internal alignment and execution locked down will be essential. If you're looking for more insight on how to use revenue operations and Revenue Acceleration as part of your GTM strategy, reach out to the Drift and Clari teams today 📌

About Drift

Drift is the Revenue Acceleration Platform that uses Conversational Marketing and Conversational Sales to help companies grow revenue and increase customer lifetime value, faster. More than 50,000 businesses use Drift to align sales and marketing on a single platform to deliver a unified customer experience where people are free to have a conversation with a business at any time, on their terms.

To learn more, visit drift.com.

About Clari

Clari's Revenue Operations Platform helps B2B organizations increase win rates, shorten sales cycles, and improve forecast accuracy by using AI and automation to create full-funnel accountability across go-to-market teams. Clari is used by hundreds of sales, marketing, and customer success teams at leading B2B companies including Adobe, Zoom, Dropbox, and Okta to drive pipeline, audit deals and accounts, forecast the business, and reduce churn.

To learn more, visit clari.com.