

**APTTUS**® + conga

# Revenue Operations & the Role of Pricing

 **Ash Finnegan**

Digital Transformation Officer



# Revenue Operations Transformation

It is all about delivering ...

*transformational capabilities  
that maximize revenue yield  
through connected customer experiences*

# Connecting the Customer Experience



*ATTRACT & RETAIN CUSTOMERS WITH FLAWLESS EXPERIENCE*

# So Why Revenue Operations? Why Now?

Most DX failures are  
due to failure to  
transform the core

McKinsey

RevOps has  
materialized as one of  
the most powerful  
shifts businesses can  
make to drive  
transformative change  
to improve growth and  
performance

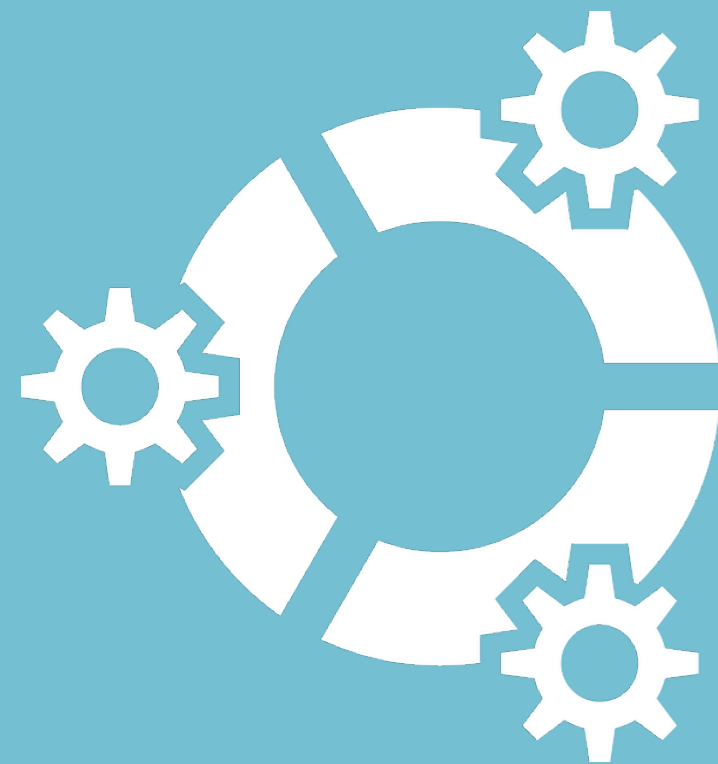
Forbes

This selection of  
capabilities provides  
4.2x ROI vs. core CRM

Nucleus Research

# Revenue Operations drives growth through operational efficiency connecting the entire customer experience end -to -end

ALIGNS EVERYONE



Creating Efficiencies

CREATES FOCUS



Driving Profitability

SIMPLIFIES EVERYTHING

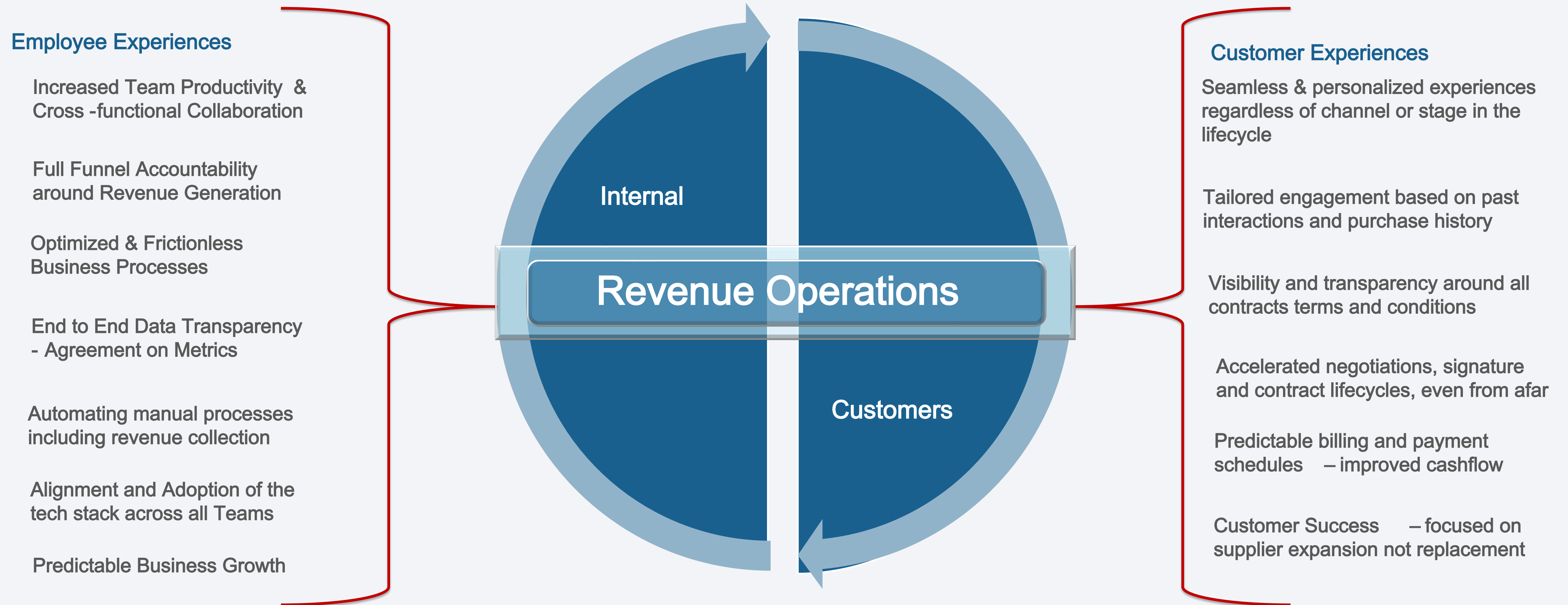


Enabling Agility

## Revenue Operations

# Revenue Operations

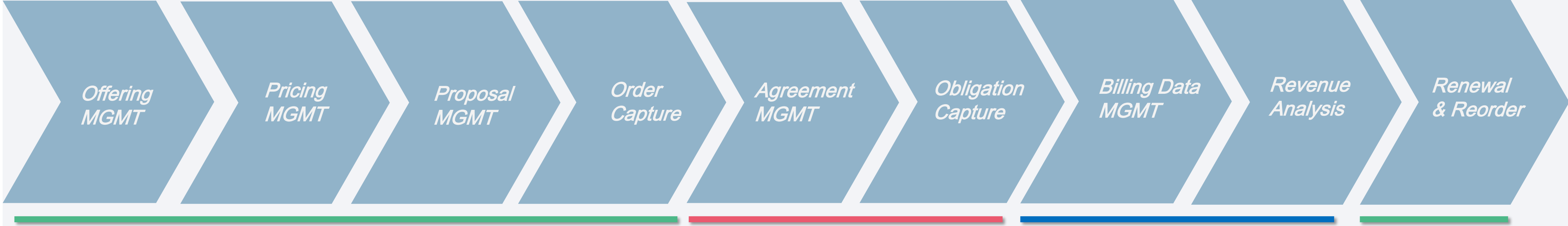
Marketing, Sales & Customer Success come together to collaborate and maintain focus on a single goal: driving revenue for the organization





# Revenue Operations Transformation

*Data Aggregation, Analytics & Optimization to Inform Next Best Action*



*End to End Document & E -signature Management*

*End to End Process Automation, Workflows & Integrations*

**MAXIMIZE REVENUE YIELD WITH SEAMLESS PROCESS**

*Delivering  
Greater Business  
Insights &  
Better Business  
Outcomes*

# Accelerating Revenue Operations Transformation

## How to be successful



### Review the Business

Business Model, Business Outcomes , Future State

What Now - Next - Beyond



### Simplify the Process

Designed to deliver business outcomes, data capture & ability to pivot

Focus on: Process, People & Technology



### Apply the Technology

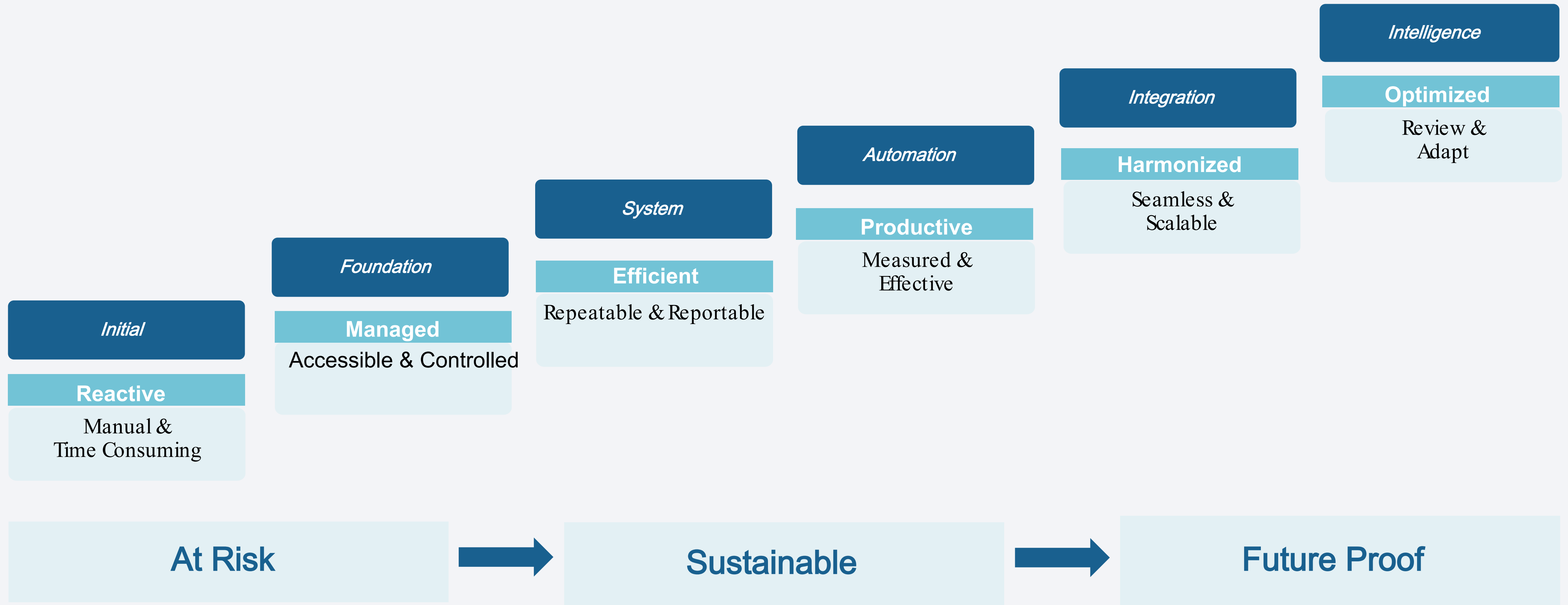
Climb the QTC Maturity Curve to Business Success!

Map the Technology to the Business Outcomes



# Maturity Framework:

Delivering Agility, Flexibility, Scale & Rapid Time to Value



# MATURITY MODEL – Applied across the entire Revenue Operations Process

## TRACK WHAT CURVE – WHAT STAGE – WHAT TECHNOLOGY (SOLUTION MANAGEMENT)

### INTELLIGENT Optimized

<p>○ Optimize &amp; scale using advanced Insights/reporting for unparalleled sales performance reviewed &amp; implemented in short -term, agile cycles</p>	<p>Embedded analytics to show comprehensive price waterfall and resultant margin (subject to user entitlement) Embedded Win/Loss analysis</p>	<p>Embedded contextual analytics to show recent “similar” transactions (price, volume, etc.)</p>	<p>Segment-based pricing optimization execution (e.g. driven by share/ volume or margin strategy and objectives)</p>	<p>AI-Driven upsell/Cross Sell AI Driven Price Guidance</p>	<p>AI-Driven customer White-space analysis and Sales recommendations AI-driven customer attrition notification/ warning</p>
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### INTEGRATION Harmonized

<p>○ Integration to other systems - CLM, ERP &amp; fulfillment systems – Moving to sophisticated multi/omni channel management – Commerce</p>	<p>Revenue Operations Processes are all managed in single CRM System</p>	<p>Integration to complementary solutions native to the platform (e.g. Agreements, Revenue Management, etc.)</p>	<p>Revenue Operations Processes are all managed in CRM plus one other system (Financial System). Transactional data and costs available from ERP</p>	<p>Integration to external solutions to provide additional inputs and information/guidance (e.g. price optimization engine, PLM, manufacturing configurators, 3-D visualization, etc.)</p>	<p>Revenue Operations Processes are all managed Omni &amp; Multi-Channels</p>
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### AUTOMATION Productive

<p>○ Simplified, accelerated processes, largely automated incl. guided selling with intelligent product recommendations &amp; deal scoring tools</p>	<p><b>Data aggregation tools to make data actionable-</b> Introduction to the <b>E-signature</b> of Documents</p>	<p>Advanced Approval Workflows (e.g. parallel, quorum, sequential, delegation of authority, auto-escalation, etc.)</p>	<p>Advanced Workflow processes to validate financial &amp; service availability &amp; suitability– Bulk sending of specific notifications based on product set</p>	<p>Rules-based Up-sell/Cross-sell and Price Guidance</p>	<p>Configurable line item and deal scoring to drive approval process</p>
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### SYSTEM Efficient

<p>📍 Automatic Proposal/Quote creation with collaboration and intelligent workflow approvals across sales teams and leaders</p>	<p>CRM System Managed Proposal/Quote Generation– <b>Standard</b> Templates managing business logic for the creation, sharing &amp; sending of documents – detailed reporting</p>	<p>CRM System Managed Proposal/Quote Generation – <b>Advanced</b> Templates managing business logic for the creation, sharing &amp; sending of documents – detailed reporting</p>	<p>CRM System Managed Proposal/Quote Generation – <b>Online</b> Templates managing business logic for the creation, sharing, Collaboration &amp; sending of documents – advanced real time reporting</p>	<p>CRM System Managed Proposal/Quote Generation – Online Templates managing business logic for the creation, sharing, Collaboration &amp; sending of documents across <b>omni channels</b></p>	<p>CRM System Managed Proposal/Quote Generation – <b>Dynamic Templates</b> managing business logic for the creation, sharing, Collaboration &amp; sending of documents across <b>omni channels</b></p>
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### FOUNDATION Managed

<p>● One System Location - for all product and pricing information - Powerful configurator to simplify vast product &amp; pricing complexity</p>	<p>Global price-list and product catalogue, upsell/ cross-sell, multi-languages, currency &amp; price-books</p>	<p>Family based structure, Bundle Products, Volume &amp; Tier based Pricing- SAAS Subscription Pricing Model. Multiple Units of Measure</p>	<p>Customer Specific, Exclusion &amp; Inclusion rules, Usage /Dimension based pricing, SKU Margin analysis &amp; Contract Price overrides</p>	<p>Contextual Filters, Solution Based Guided Selling Products, Index &amp; Formula, Massed price changes, Deal Level Discount Margins</p>	<p>Promotion management and application in deals. Rebate set-up and export to ERP</p>
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SOLUTIONS MGMT



# MATURITY MODEL – Applied across the entire Revenue Operations Process

## TRACK WHAT CURVE – WHAT STAGE – WHAT TECHNOLOGY

	OFFERING MGMT	AGREEMENT MGMT	REVENUE MGMT
<b>INTELLIGENT</b> Optimized	○ Optimize & scale using advanced Insights/reporting for unparalleled sales performance reviewed & implemented in short-term, agile cycles	○ Advanced insight and reporting reviewed to raise performance against key metrics, reviewed & adapted in short-term, agile cycles	○ Retain, streamline & grow revenue / prevent churn and fraud by leveraging the intelligence from a unified view of the customers
<b>INTEGRATION</b> Harmonized	○ Integration to other systems - CLM, ERP & fulfillment systems – Moving to sophisticated multi/omnichannel management – Commerce	○ Integration to other systems - CPQ, ERP and fulfillment systems for accurate quoting, billing and high customer satisfaction	○ Integrations with AR / GL / Payment and Fulfillment, order and contracts systems for revenue tracking
<b>AUTOMATION</b> Productive	● Simplified, accelerated processes, largely automated incl. guided selling with intelligent product recommendations & deal scoring tools	● Simplified, accelerated processes, largely automated. Driving collaboration, adoption and cross team working	● Repetitive tasks like Invoice runs / credit memo runs and rating / un-rating usage can be automated
<b>SYSTEM</b> Efficient	● Automatic Proposal/Quote creation with collaboration and intelligent workflow approvals across sales teams and leaders	● Systematically generated templated contracts with standardized clause library, self-service and negotiation tools	● System can handle the subscription lifecycle for complex bundled offerings and can process usage
<b>FOUNDATION</b> Managed	● One System Location - for all product and pricing information - Powerful configurator to simplify vast product & pricing complexity if required	● Central Repository with consistent meta-data captured. Analysis, reporting & search capabilities on contract portfolio	● Ability to bill and invoice every “commercial interaction” treating it as upfront purchase

Connecting the Customer Experience 



Thank you!