

BoostUp Revenue Operations & Intelligence Masterclass (RO&I) Q&A

Valuable perspectives from Forrester Principal Analyst Anthony McPartlin on the RO&I Market.

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1. Where do you see this market in the next 2-3 years? Do you feel point solutions will thrive, or will the market continue to consolidate and have more horizontal use cases?
2. What is the threshold (company headcount, ARR) that companies hit when they begin to feel scaling pains in RevOps and need to break away from manual analytics and excel reports and start investing in a RO&I platform for Forecasting and Pipeline Management?
3. What are the top KPIs or business objectives that are fulfilled by RO&I solutions?
4. How important do you see the depth and range of data being captured around buyer and seller interaction in RO&I and ultimately driving predictability and accuracy in your business (forecast)?
5. What has circulated as the top drivers or inflection points for purchasing a RO&I solution in your market research?

Question 1: Where do see this market in the next 2-3 years? Do you feel point solutions will thrive or will the market continue to consolidate and have more horizontal use cases?

There are a couple of main forcing factors that we see above and beyond others. The first one is the pandemic. That brought home to sales leaders the need to have the capability to engage digitally with buyers and have transparency into what that engagement looks like.

Who, when, where, how, and with what? B2B organizations also need input into what is working and what isn't so they can optimize engagement and tailor coaching and enablement efforts such as onboarding and training. Without those insights, sales leaders are flying blind.

The second forcing factor was revenue unpredictability and pressure on sales organizations to provide more trustworthy and robust probabilities around where revenue would be at the end of the quarter. The reality is that B2B sales forecasting as a process in many organizations is still immature across all levels of organizational maturity.

It's often not consistent, robust, and lacks accountability and the critical insights to effectively and consistently guide the organization.

Finally, the increasing introduction of the CRO role and the application of revenue operations are placing a much greater focus on the macro-management and systemic optimization of the revenue engine itself instead of a more traditional narrow focus on deals or accounts.

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Question 2: What is the threshold (company headcount, ARR) that companies hit when they begin to feel scaling pains in RevOps and need to break away from manual analytics and excel reports and start investing in a RO&I platform for Forecasting and Pipeline Management?

Well, it's funny in my experience; it doesn't always break down like that. Most startups in series round funding, in my experience, are very quick to adopt RO&I platforms. Part of that is because their VC investors either expect or demand it. We tend to see the more significant gaps in more traditional B2B enterprises with less modern approaches to operations.

They may have larger sales teams that are more geographically and demographically dispersed (in terms of age), which brings cultural challenges (the organization may have plenty of its own). There often is a struggle for consistent investment in both the function and technology, all in an often complex and muddled tech stack.

Question 3: What are the top KPIs or business objectives that are fulfilled by RO&I solutions?

RO&I solutions have prospered by filling feature, user experience, insight, and execution gaps within and between existing categories to create a new value proposition for buyers. That value proposition some key business objectives such as:

High-value engagement. Driving higher value engagement with buyers leads to more and bigger deals in the pipeline that convert at higher rates.

Revenue predictability. More predictable revenue through transparent accountability.

Deal forensics. Using the insights from RO&I as forensics into deal success to repeat and scale what's working.

Buyer knowledge. The ability to better understand the modern buyer and buying groups, who they are, their preferences for interaction, and their sentiment towards our company and our products.

Revenue engine optimization. RO&I should seek to optimize individual interactions, opportunities, or accounts and the entire end-to-end process.

Question 4: How important do you see the depth and range of data being captured for RO&I solutions - ultimately driving predictability and accuracy in your business (forecast)?

I think the range and depth of interaction insights are critical in optimizing engagement or business predictability and should be key selection criteria when looking at providers in the space. If I'm a CRO, for example, or a sales leader, trying to assess where we will likely end up at the end of the quarter or how the team is performing, I want access to as much quality and accurate data as possible. So I need to see all interactions, not just some of them.

But, of course, that depends on those interactions being accurately assigned to the right contact, opportunity, and account, which is why matching is a key requirement and why we highlighted data capabilities as a crucial element in our recent RO&I Forrester Wave evaluation.

Question 5: Where do you see this market in the next 2-3 years? Do you feel point solutions will thrive, or will the market continue to consolidate and have more horizontal use cases?

Ah, the million-dollar question. There is a clear trend towards more significant consolidation in the market right now, with a greater focus on platforms over point solutions. And that makes sense to me, given that many sales organizations have too much sales tech that is poorly implemented or adopted and isn't delivering enough value. Now whether things stay that way is another thing.

This market is young. Looking at how other markets have evolved, expansion and consolidation have been an ongoing alternating set of rhythms. So we're dancing to the beat of consolidation now, but it's too early to say whether this is a permanent feature. History from other categories would suggest that longer-term, the answer is no.

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