

# BoostUp<sup>!</sup>

## REVENUE OPERATIONS AND INTELLIGENCE (RO&I) RFP CHECKLIST



# RO&I Vendor Evaluation

So, it's time to evaluate Revenue Operations and Intelligence (RO&) solutions. If you're reading this, you're either looking to replace your existing platform or implementing your very first. Regardless of the case, the goal of this RFP checklist is to help you find the best RO&I vendor for your needs.

In this situation, it is also imperative to consider the future. The revenue function is at an inflection point today. Technology fundamentally reshapes how sales, marketing, and customer success teams work through advanced computing, AI, and other innovations.

The result is a shift in each function's structures, strategies, tactics, and workflows.

---

Gartner's research shows that **77% of sales leaders say their digital transformation has accelerated in the last two years and that 80% of all B2B sales interactions will occur in digital channels by 2025.**

The digitization of sales means that your RO&I solution must stand ready to take full advantage of digital sales activities for deal-by-deal forecasting, predictive analytics, engagement analytics, and more.

**"80% of all B2B sales interactions will occur in digital channels by 2025."**

**- Gartner**

# Questions to Ask RO&I Solution Providers

---

## Before You Start

Before looking for an RO&I solution provider, you must start with the end in mind. You should be focused on your business priorities, identify the gaps that you have in your organization, what are the priorities, and then start to map the technology to that.

The RO&I solution that you choose must not only align with your current needs, stand to provide the same benefits (or even more), and drive change as your organization progresses over time. The most prominent indicator of this is the digitization of sales.

## Questions to Ask

1. What range of interactions and digital buyer signals are being captured?
2. How accurate is the activity matching to the right account, opportunity and contact?
3. Does the vendor support custom objects?
4. How configurable is the platform? Can you customize it to fit your needs?
5. Does the platform support complex selling motions and advanced forecasting?

**"66% of buyers in 2021 opted for remote human interactions or digital self-service vs in-person."**

**- McKinsey & Company**

# RO&I Evaluation Themes

---

RO&I platforms developed before this rapid digitization are typically built only for sales leadership. They provide little to no value to front-line managers and salespeople who are still expected to use them. They are not structured for revenue teams' new, collaborative nature and are unusable for anyone but those experienced in sales.

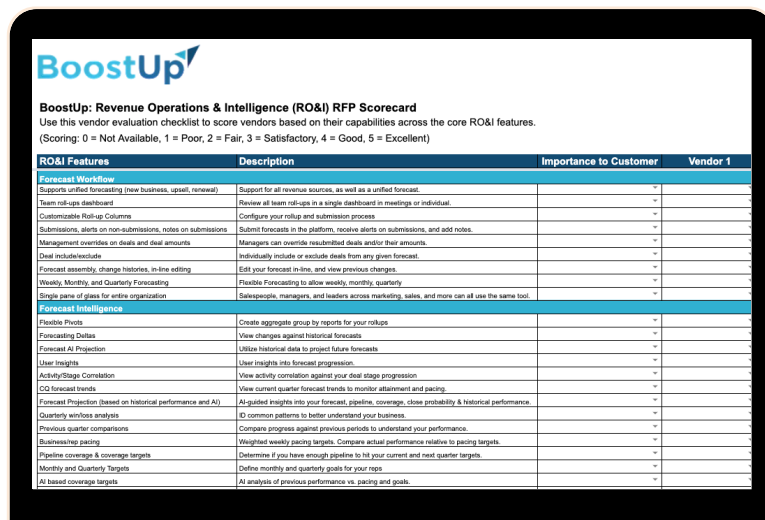
RO&I platforms created for the digital era are far different. They unite revenue teams and entire organizations around a single pane of glass.

They are usable by everyone. Leadership, operations, front-line managers, and sales reps all derive the same value, share the same metrics, and get a common view of their goals. They also provide the context that teams need to truly understand trends that affect win rates, deal velocity, and effective and accurate forecasting.

- 1. Forecast and Pipeline Management**
  - Am I able to become more accurate in my forecast?
  - Am I able to get insights into the health of my pipeline?
- 2. Deal and Account Inspection and Execution**
  - Do I know if my accounts and deal are healthy?
  - Do I have the insights needed to make data-driven and informed decisions?
  - Am I able to increase sales collaboration?
- 3. Activity and Frontline Performance**
  - Am I able to track all buyer and seller activity data and accurately tie that back to the right account, opportunity and contact?
  - Am I able to get visibility into the health of my accounts and deals?
  - Do I have the insights to know who my high performers are?
  - Am I am able to identify risk before it's too late?

# How to Use this RFP Checklist

This RFP Checklist contains some of the most crucial features and functions of a comprehensive RO&I platform. Use the RFP checklist to evaluate RO&I vendors based on the capabilities of a RO&I platform and the features and functionality that are most important to your organization's needs.



**BoostUp**

**BoostUp: Revenue Operations & Intelligence (RO&I) RFP Scorecard**  
Use this vendor evaluation checklist to score vendors based on their capabilities across the core RO&I features.  
(Scoring: 0 = Not Available, 1 = Poor, 2 = Fair, 3 = Satisfactory, 4 = Good, 5 = Excellent)

RO&I Features	Description	Importance to Customer	Vendor 1
<b>Forecast Workflow</b>			
Supports unified forecasting (new business, upsell, renewal)	Support for all revenue sources, as well as a unified forecast	✓	
Team roll-ups dashboard	Review all team roll-ups in a single dashboard in meetings or individual	✓	
Customizable Roll-up Columns	Configure your roll-up and submission process	✓	
Submissions, alerts on non-submissions, notes on submissions	Submit forecasts in the platform, receive alerts on submissions, and add notes	✓	
Management overrides on deals and deal amounts	Managers can override resubmitted deals and/or their amounts	✓	
Deal include/exclude	Individually include or exclude deals from any given forecast	✓	
Forecast assembly, change histories, in-line editing	Edit your forecast in-line and view previous changes	✓	
Weekly, Monthly, and Quarterly Forecasting	Flexible Forecasting to allow weekly, monthly, quarterly	✓	
Single pane of glass for entire organization	Salespeople, managers, and leaders across marketing, sales, and more can all use the same tool	✓	
<b>Forecast Intelligence</b>			
Flexible Photos	Create aggregate group by reports for your rollups	✓	
Forecasting Delays	View changes against historical forecasts	✓	
Forecast AI Projection	Utilize historical data to project future forecasts	✓	
User Insights	User insights into forecast progression	✓	
Activity/Stage Correlation	View activity correlation against your deal stage progression	✓	
QO forecast trends	View current quarter forecast trends to monitor attainment and pacing	✓	
Forecast Projection (based on historical performance and AI)	AI-guided insights into your forecast, pipeline, coverage, close probability & historical performance	✓	
Quarterly win/loss analysis	Identify common patterns to better understand your business	✓	
Previous quarter comparisons	Compare progress against previous periods to understand your performance	✓	
Business pacing	Weighted weekly pacing targets. Compare actual performance relative to pacing targets	✓	
Pipeline coverage & coverage targets	Determine if you have enough pipeline to hit your current and next quarter targets	✓	
Monthly and Quarterly Targets	Define monthly and quarterly goals for your reps	✓	
AI based coverage targets	AI analysis of previous performance vs. pacing and goals	✓	



[Download the RO&I RFP Checklist.](#)

## BoostUp is Here to Help

If you have any questions about RO&I platforms, we're here to help. Feel free to contact us at any time.

BoostUp.ai is the fastest-growing Revenue Operations & Intelligence Platform, helping revenue teams like Teradata, Udemy and Cloudflare automate forecasting roll-ups, achieve 95% or greater forecast accuracy, increase rep capacity, and drive a predictable revenue machine.

We bring together all digital revenue data and predictive intelligence into a single, highly usable platform where reps spend 20 mins per day.

[www.boostup.ai/get-a-demo](http://www.boostup.ai/get-a-demo)

[www.linkedin.com/company/boostup-ai](http://www.linkedin.com/company/boostup-ai)