

# RevOps Cheat Sheet (AI Edition)

## 1 Definition

Revenue Operations (RevOps) aligns sales, marketing, customer success, and finance to run the entire revenue lifecycle. It now orchestrates people and AI agents across that lifecycle: designing, deploying, and governing AI inside revenue workflows. Clean data and tight processes become the fuel agents run on. **RevOps is now becoming the orchestration layer of the GTM org.**

## 2

## Core Functions

**Strategy**  
Build AI-assisted revenue forecasting models that update continuously. Optimize pricing, marketing, and CS, with agents running inside them. Hand repetitive tasks to agents, not just rules. Set what runs autonomously vs human-in-the-loop. Own the lead-to-revenue cycle end to end.

**Process Optimization**  
Streamline workflows across sales, marketing, and CS, with agents running inside them. Hand repetitive tasks to agents, not just rules. Set what runs autonomously vs human-in-the-loop. Own the lead-to-revenue cycle end to end.

**Data & Analytics**  
Build the unified data layer that powers both reporting and agents. Track performance with dashboards and KPIs, including agent output. Forecast trends and surface gaps proactively with AI instead of manual checks.

**Systems**  
Own the stack (CRM, MAP, analytics) and the agent + orchestration layer on top of it. Integrate tools via APIs and MCP. Manage data hygiene and governance so the data foundation stays reliable enough to run agents on.

**Cross-Team Alignment**  
Set shared goals and accountability across revenue teams, including who owns each agent. Standardize reporting across humans and agents. Improve collaboration by reviewing agent work together.

**AI Orchestration & Governance**  
Build, deploy, and monitor agents across the funnel. Set the guardrails: approval workflows, data access, audit trails. Own accountability for every agent in production.

## 3 New AI RevOps Playbook

| RevOps in 2025   | vs. | RevOps in 2026   |
|--|-----|--|
| <b>The Strategy</b><br>Designed manual processes, experimented with AI tools, but deployed them on incomplete data. Struggled to show real strategic impact on the business.   |     | <b>The Strategy</b><br>Orchestrates humans, agents and tools across the GTM org to get the right data, automate manual processes and get strategic insights for the business.  |
| <b>The Playbook</b> <ol style="list-style-type: none"><li>Created manual processes for reps, couldn't enforce them.</li><li>Relied on human judgment and manual execution.</li><li>Could use only structured data for reports, analysis.</li><li>Gave leaders anecdotal insights and static reports.</li></ol> |     | <b>The Playbook</b> <ol style="list-style-type: none"><li>Deploys agents that automate the processes.</li><li>Combines human judgment with agentic orchestration.</li><li>Builds a unified data layer (structured + unstructured data).</li><li>Gives leaders strategic insights for product, headcount.</li></ol> |
| <b>The Tech Stack</b><br>GONG, Clari, Power BI, ZoomInfo, Excel  |     | <b>The Tech Stack</b><br>weflow, Claude, CURSOR, Vercel, n8n, clay, Notion, Interoom   |
| Manual operator of the GTM org.  |     | AI orchestrator of the GTM Org.  |

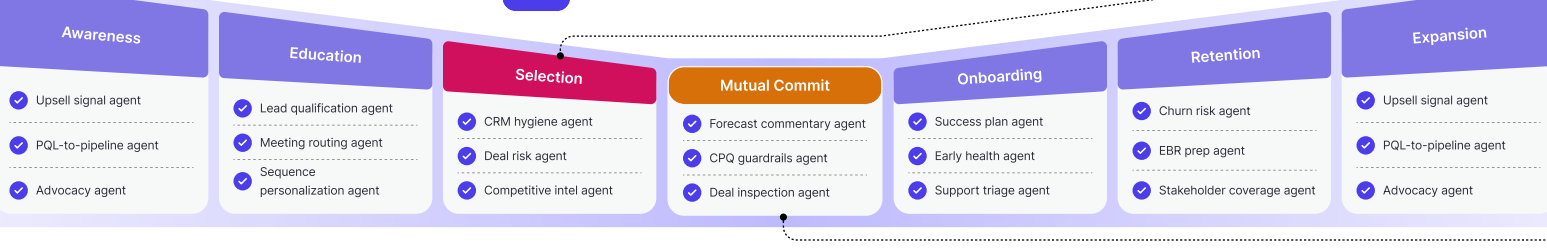
## 4 AI RevOps Team Structure

| Old RevOps  | vs.  | New RevOps  |  |   |
|---|--|---|--|---|
| <b>Old RevOps Roles</b> <ul style="list-style-type: none"><li>Head of RevOps: Owns the function, manages up and across</li><li>Marketing Ops: Campaign ops, lead routing, attribution reporting</li><li>CS Ops: Post-sale data, renewals tracking, CSM support</li><li>Business Analyst: Reports, dashboards, ad hoc requests</li><li>Sales Ops: Quota, territories, rep requests, comp disputes</li><li>Deal Desk: Pricing approvals, contract routing, exceptions</li><li>Enablement: Training, playbooks, rep onboarding</li><li>Salesforce Admin: Fields, flows, firefighting daily tickets</li></ul> | <b>Tech Stack</b><br>GONG, Excel, Outreach, Looker, ZoomInfo, LinkedIn, Veeva, Zendesk | <b>New RevOps Roles</b> <ul style="list-style-type: none"><li>RevOps Leader: Exec alignment, roadmap, strategic owner</li><li>GTM Engineer: Outbound systems, tool integrations</li><li>Salesforce Engineer: Owns the data model, not just the fields</li><li>AI Ops Managers: Decides what gets automated vs what stays human</li><li>Revenue Enablement: Rep workflows, coaching system, productivity tooling</li></ul> | <b>Tech Stack</b><br>weflow, clay, n8n, Claude, Vercel, Notion, Interoom | <b>Stack Cost</b><br>Old: >\$900K/yr<br>New: <\$700K/yr |

## 5 RevOps AI Maturity Model

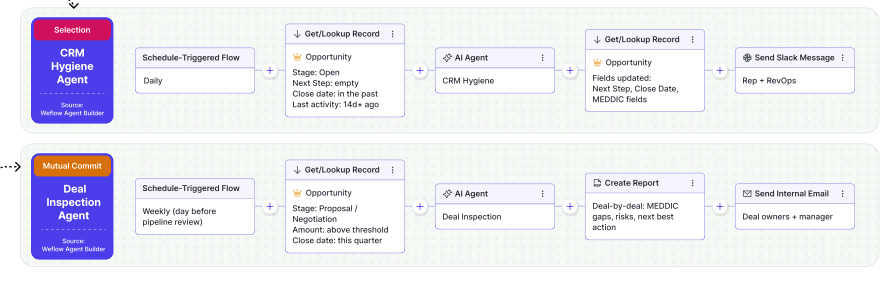
| AI Adoption  | Stage  | Role of RevOps   |
|--------------|--|--|
| Ad Hoc       | Reps still experimenting ChatGPT/ Claude individually  | Not actively involved in the revenue AI strategy yet.  |
| Foundations  | Uneven adoption. Handful of early adopters drive results.                                    | Steps in and builds the foundational data layer.   |
| Standardized | AI is reactive. Reps query it when they think to. RevOps pulls automated reports when asked. | Enforces AI: Field requirements, prompt standards, data hygiene rules                        |
| Intelligent  | AI workflows automate manual, repetitive tasks across the GTM org.                           | Builds scoring models and alert logic on top of the clean, complete data from stage 2 and 3. |
| Autonomous   | Agents handle prospecting, qualification, forecasting.                                       | Scales AI across the entire revenue org by orchestrating agents                              |

## 6 AI Agents Across Bow-tie



## 7

## AI Agents for RevOps



## 8 RevOps AI Tech Stack

| Marketing  | Prospecting  | Sales   | Customer Success  | CRM  | Data Warehouse  |
|--|--|---|---|--|---|
| <b>Marketing Automation:</b> HubSpot, Marketo, Inflection<br><b>Routing &amp; Scheduling:</b> CHILIPIPER, Colendy, LeorData<br><b>Ads:</b> demand science, sense, Demandbase<br><b>Content:</b> Copy.ai, Descript, Claude, Jasper, ChatPT, Riverside | <b>Lists &amp; Enrichment:</b> Cognism, Seamless.AI, Clay, LinkedIn, ZoomInfo, Apollo.io<br><b>Signal Orchestration:</b> Common Room, MedKudu, UserGems<br><b>Sales Engagement:</b> Salesloft, Outreach, Lemlist, Warmly, Instantly, Apollo.io<br><b>AI SDR Agents:</b> 11X, ARTISAN<br><b>Voice &amp; Video:</b> Nooks, dialpad, sentspark, ORUM, aircall<br><b>Misc:</b> loom, vidyard, LAVENDER, RE-3 | <b>Forecasting &amp; Reporting:</b> weflow, Clari, BoostUp<br><b>Revenue Intelligence:</b> weflow, Clari, GONG<br><b>Conversation Intelligence:</b> weflow, FATHOM, GONG<br><b>Enablement:</b> FATHOM, GONG, Aligned, HIGHSPOT, Showpad<br><b>Compensation:</b> CaptivateIQ, dealhub, QUOTAPATH, PandaDoc, nue, everstage | <b>CS Platforms:</b> Gainsight, Channable, Totango, pleasat<br><b>AI notaker:</b> weflow, tldv, FATHOM<br><b>Chat:</b> Microsoft Teams, slack, INTERCOM<br><b>Renewals &amp; Expansions:</b> weflow, Vitality<br><b>Customer Support:</b> Freshdesk, Drift, Zendesk, Pylon<br><b>Project Management:</b> asana, Trello<br><b>Misc:</b> monday.com, loom | <b>CS Platforms:</b> attio, folk, monday CRM, Close<br><b>Infrastructure Platforms:</b> HubSpot, Salesforce, Dynamics 365<br><b>By Industry:</b> affinity, Veeva CRM, SAP CRM, GENESYS<br><b>Foundation LLMs:</b> Claude, Vertex AI, Llama | <b>Data Warehouse:</b> snowflake, Amazon Redshift<br><b>ETL:</b> Google Big Query, Amazon Redshift<br><b>Product Analytics &amp; BL:</b> Amplitude, mixpanel, Heap, Segment, rudderstack, Census, SYNCARI, Power BI, Looker |

## 9 RevOps Metrics

| Investor metrics   | Marketing metrics   | Sales metrics  | Customer Success metrics   | Financial metrics   | AI & Agent Metrics  |
|--|---|--|--|---|---|
| <b>Role of 40:</b> Combined metric of growth and profitability that should be > 40%. Calculated as: $\frac{\text{Revenue Growth Rate} + \text{EBITDA Margin}}{2}$<br><b>Magic Number:</b> Measures sales efficiency - the revenue generated for each sales agent on sales and marketing. Calculated as: $\frac{\text{Net New ARR}}{\text{Previous Quarter's Sales & Marketing Spend}}$<br><b>CAC Payback Period (Months):</b> The time it takes to recover the cost of acquiring a customer from their gross margin. Calculated as: $\frac{\text{CAC}}{\text{Gross Margin} - \text{Gross Margin} \times \text{Average Revenue Per Account}}$<br><b>LTV:CAC Ratio:</b> The ratio between customer lifetime value and customer acquisition cost. Measures the return on customer acquisition spending. Calculated as: $\frac{\text{LTV}}{\text{CAC}}$<br><b>Net Dollar Retention:</b> Measures revenue growth from existing customers, including expansions, contractions, and churn. Calculated as: $\frac{\text{Beginning ARR} + \text{Expansions} - \text{Churn}}{\text{Beginning ARR} + 100}$<br><b>Gross Dollar Retention:</b> Percentage of recurring revenue retained from existing customers, excluding expansions<br><b>Burn Multiple:</b> Measures efficiency in spending to grow ARR<br><b>Free Cash Flow (FCF):</b> Indicates how much cash a company generates after expenses. Calculated as: $\frac{\text{Operating Cash Flow} - \text{CapEx}}{\text{Revenue} + 100}$<br><b>EBITDA Margin (%)</b> : Operating profit to measure profitability before accounting for financing costs. Calculated as: $\frac{\text{EBITDA}}{\text{Revenue}} + 100$ | <b>Growth metrics:</b> MQL to SQL Conversion Rate, Cost per MQL, MQL Growth Rate, Lead Scoring Effectiveness, MQL Response Time, Unique Visitors, Time on Site, Bounce Rate, Conversion Rate (Website to leads), Traffic Sources Distribution, Cost per Click (CPC), Cost per Acquisition (CPA)<br><b>Marketing metrics:</b> Percentage of MQLs that convert to SQLs, Total marketing spend divided by number of MQLs generated, Month-over-month or year-over-year growth in MQL volume, Percentage of MQLs that meet minimum scoring threshold based on demographic and behavioral criteria, Average time taken to respond to new MQLs, Number of distinct individuals visiting your website in a given period, Percentage of visitors who complete a desired action (form fill, sign-up, etc.), Breakdown of traffic by source (organic, paid, direct, referral, social), Average cost per click for paid advertising, Total marketing cost divided by number of acquisition (SQL) | <b>Sales metrics:</b> Pipeline Coverage Ratio, Pipeline Velocity, Average Deal Size, Win Rate, Sales Cycle Length, SQL Conversion Rate, Customer Acquisition Cost (CAC), Sales Probability Ramp Time, Sales Activity Metrics<br><b>Sales metrics:</b> Total value of opportunities in pipeline divided by revenue target for the period. Shows if team average targets is hit, higher also means for longer sales cycles, Rate at which opportunities move through pipeline. Calculated as: $\frac{\text{Number of Deals}}{\text{Deal Size} \times \text{Win Rate}} \times \text{Sales Cycle Length}$ , Values to deal size, but healthy pipeline also considered revenue with 125% of deal being targeted, Values solely to market segment, $\frac{\text{MQLs}}{\text{MQLs}} \times \text{MQLs}$ , $\frac{\text{MQLs}}{\text{MQLs}} \times \text{MQLs}$ , Percentage of opportunities that meet or exceed win goals, Calculated as: $\frac{\text{Deals}}{\text{Deals}} \times \text{Deals}$ , Average time from first meaningful contact to deal closure, Percentage of Sales Qualified Leads that convert to customers, Total sales and marketing spend divided by number of new customers acquired in a period, Time required for new sales rep to reach full productivity (usually within 3-6 months), Percentage of available selling time spent on revenue-generating activities, Key activity metrics tracked per rep (calls, emails, meetings, etc.) | <b>Customer Success metrics:</b> Time to First Value, Product Adoption Rate, Feature Usage Metrics, Support Ticket Volume, Customer Churn Rate, Revenue Churn Rate, Net Revenue Retention (NRR), Gross Revenue Retention (GRR), Customer Lifetime Value (CLV), Expansion Revenue<br><b>Customer Success metrics:</b> 90% (Days to weeks)   Enterprise 1-3 months   Faster is better, Percentage of purchased features/modules actively used by customers, Frequency and depth of feature utilization by customers, One feature: Used by 40% of customers, Measure customer health based on feedback to recommend an action of 0-10, Calculated as: $\frac{\text{Proportion of 100 (max) to 0 (min) score}}{\text{Proportion of 100 (max) to 0 (min) score}}$ , Number of support tickets per customer per month, Value by product complexity, Healthy < 2 tickets per customer per month, First response < 4 hours, Resolution time < 24 hours, Percentage of customers that cancel or churn in a given period, Percentage of recurring revenue lost from existing customers, 90% - 95% annually, Enterprise < 1% churning, Best-in-class < 0.5% churning, Total revenue from existing customers including expansions, renewals and contractions, 90% - 95% annually, Best-in-class < 0.5% churning, Predicted total revenue from a customer over the entire relationship, Higher rates indicate better unit economics, Additional revenue generated from existing customers through upsells, cross-sells, or usage increases, Should represent 20-30% of total revenue, Best-in-class > 10% | <b>Financial metrics:</b> Annual Recurring Revenue (ARR), Monthly Recurring Revenue (MRR), Year-over-Year (YoY) Growth Rate, Quarter-over-Quarter (QoQ) Growth Rate, Logo Growth Rate, Burn Rate, Runway, Cash Conversion Cycle, Gross Margin, Operating Expense Ratio<br><b>Financial metrics:</b> The combined annual value of all active subscriptions, including base subscriptions and consumption-based add-ons. Excludes one-time fees, professional services, and other non-recurring revenue, Growth: 30-35% (SaaS), 20-30% (SaaS), 15-20% (SaaS), 10-15% (SaaS), 5-10% (SaaS), The percentage change in revenue generated from active customers, Calculated as: $\frac{\text{Current Quarter Revenue} - \text{Previous Quarter Revenue}}{\text{Previous Quarter Revenue}} \times 100$ , The percentage change in revenue compared to the previous quarter, Calculated as: $\frac{\text{Current Quarter Revenue} - \text{Previous Quarter Revenue}}{\text{Previous Quarter Revenue}} \times 100$ , The net increase in total number of paying customers over a period, Calculated as: $\frac{\text{End of Period Customers} - \text{Start of Period Customers}}{\text{Start of Period Customers}} \times 100$ , The amount of new revenue before a company runs out of cash at the current burn rate, Calculated as: $\frac{\text{Current Cash Balance}}{\text{Monthly Burn Rate}}$ , The three S&Bs to convert revenue into the cash flow from sales, 3 S&Bs: typically measured as the time between signing for customer acquisition and collecting payment from customer, Annual contracts sold against revenue CAGR, Monthly revenue: 30-50 days, Enterprise 60-90 days, Best-in-class < 15% | <b>AI &amp; Agent Metrics:</b> Agent Adoption Rate, Workflow Coverage, Active Agents, Quality & Trust, Accuracy, Human Oversight Rate, Error Rate, Efficiency & Cost, Hours Reduced, Time to Resolution, Impact, Data Readiness<br><b>AI &amp; Agent Metrics:</b> 1 of team actively using deployed agents, 1 of 10 workflows with an agent in that, Agents live in production, Task Completion Rate, % of agent tasks correct without human, % of agent tasks correct on revenue, % of agent tasks a human reviews, % of agent runs that fail or timeout, Run cost of an agent task vs manual, Review manual cost, Human hours saved per week, Track need, Faster than manual, Closedness touched by an agent, Track & % of work, Done of work coming without a human in the loop, Track & % of work, Completeness & accuracy of core CRM data, > 95% before scaling agents, Data readiness is the goal. Moxey Salesforce data feeds every agent downstream. Clean data P&L agents second. |

## 10 RevOps Education

| Communities  | Podcasts  | People to follow on LinkedIn  |
|--|---|---|
| <ol style="list-style-type: none"><li>RevOps Chat</li><li>RevOps Co-op</li><li>Wizards of Ops</li><li>Operators Guild</li><li>Pavilion</li></ol> | <ol style="list-style-type: none"><li>RevOps Lab - Janis Zech &amp; Philipp Stetler</li><li>Operations - Sean Lane</li><li>RevOps FM - Justin Norris</li><li>RevOps Review - Jeff Ignacio</li><li>Science of Scaling - Mark Roberge</li><li>RevOps AF - Matthew Voims</li></ol> | <ul style="list-style-type: none"><li>Janis Zech</li><li>Sara McNamara</li><li>Jeff Ignacio</li><li>Philipp Stetler</li><li>Lindsay Rothsberger</li></ul> |

## 11 AI RevOps Resources

|   |   |   |  |   |   |
|---|---|---|--|---|---|
| <b>AI Agent Ops Cheatsheet for RevOps</b><br>RevOps will be the AI orchestrator for the GTM org. But most RevOps teams have no idea where to start. This cheatsheet shows you exactly how to do it. | <b>RevOps AI Orchestrator Cheatsheet</b><br>RevOps will be the AI orchestrator for the GTM org. But most RevOps teams have no idea where to start. This cheatsheet helps you get started. | <b>Claude for RevOps Cheatsheet</b><br>RevOps - if you love the Claude FOMO, this cheatsheet helps you get over it. | <b>AI Pipeline visibility &amp; reporting Cheatsheet</b><br>The best revenue teams have a crystal clear view of their pipeline. Their secret? They're using AI at every step. This cheatsheet helps you do the same. | <b>16 AI Workflows &amp; Prompts for RevOps</b><br>Every RevOps leader wants to implement AI. This cheatsheet gives you 16 ready-to-run AI workflows (with prompts) across 4 areas: | <b>GTM AI Cheatsheet for RevOps</b><br>Every RevOps leader talks about implementing GTM AI. But most lack a real strategy that goes beyond isolated use cases. This cheatsheet shows you how to get it right. |
| <a href="#">Weflow - Free AI Agent Ops Cheatsheet for RevOps</a>  | <a href="#">Weflow   FREE RevOps AI Orchestrator Cheatsheet</a>   | <a href="#">Weflow   Free Claude for RevOps Cheat Sheet</a>   | <a href="#">Weflow   Free AI Pipeline Visibility &amp; Reporting Cheat Sheet</a>   | <a href="#">Weflow   16 Free AI Workflows &amp; Prompts for RevOps</a>  | <a href="#">Weflow   Free GTM AI Cheat Sheet for RevOps</a>   |

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