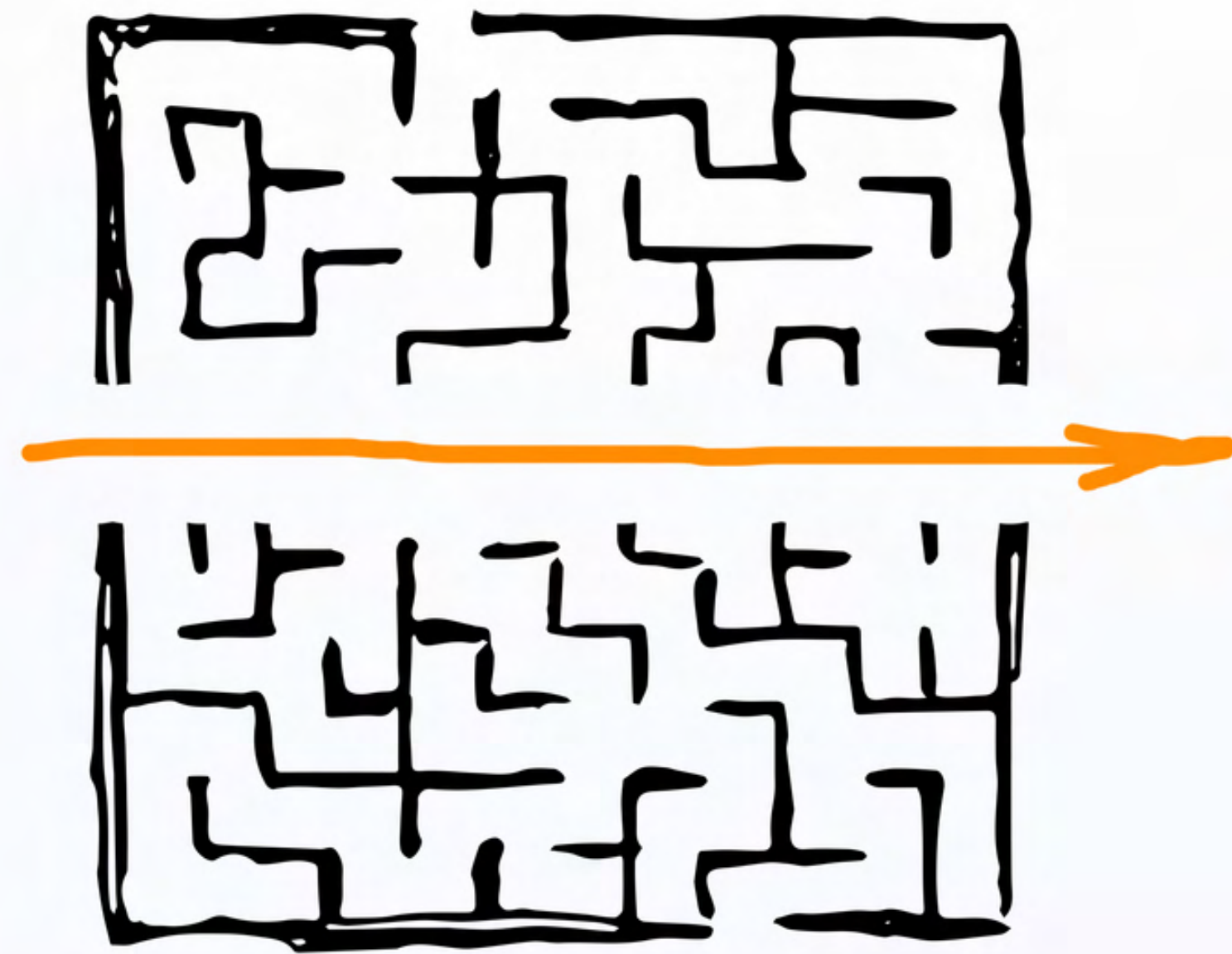


OPENPRISE®

EBOOK

# The buyer's guide to RevOps data automation platforms





## Executive summary

Data is your company's most important asset, and you have the sales and martech investments to prove it. Lately, however, your ability to build pipelines and support the use of AI in your GTM motions, no matter how much you spend, continues to fall short. The problem isn't you; it's your data. Today's data and systems are inherently siloed and disconnected. Without a unifying solution, you're left to throw more software, people, and money at them, which means more custom code, more manual processes, and more frustration – with data you still can't trust, take action on, or make strategic decisions with.


This new reality requires a different, simpler approach to data quality and orchestration. Leading the way are RevOps data automation (RDA) platforms, which use AI, automation, and prebuilt apps to remove manual work and complexity, giving sales and marketing users the secure access and self-service tools they need to achieve the aggressive results boards and investors demand.

Unlike traditional RevTech, RDA platforms don't require custom development or tedious manual processes, nor do they siphon computing power from existing systems. Instead, they stand on their own open infrastructure using no-code templates, applications, and automation to optimize and simplify the technology you have. And with the introduction of AI, they now allow you to seamlessly embed purpose-built language and other learning models directly into your RevOps processes, further pushing the envelope of what you can accomplish with the same or even fewer resources and effort.

While each RDA platform has its own technology, UI, and profile that makes it unique, the best-in-class all share a core set of capabilities that set them apart.

Those include:

- 1 Shared data layer**  
Unites your data across teams and systems for seamless collaboration and accurate insights
- 2 Data orchestration**  
Automates the movement and transformation of data to keep every system and process in sync
- 3 Process automation**  
Reduces manual tasks and accelerates RevOps with smart automation
- 4 Data engagement**  
Empowers teams to access and interact with data that is optimized for each user persona and use case through self-service
- 5 Measurement and instrumentation**  
Enables users to capture, configure, and compute the data required to enable standard and custom metrics
- 6 AI for RevOps**  
Enables the incorporation of AI into existing and new processes in a secure and compliant way



This ebook will take you into the inner workings of the ideal RDA platform and give you insight into the technology, capabilities, features, and other characteristics you should look for when evaluating one.

# Building a strong foundation: the power of a shared agile data layer

After 20 years of pursuit, the single source of truth or customer “golden record” is now an attainable goal for most businesses. However, the great technological advances and solutions that made this possible have still left most users with a generic version of the truth they can’t fully use.

Unlike customer relationship management tools (CRMs), customer data platforms (CDPs), and other systems that unify data in a specific way for a subset of users, RDA platforms make it possible to prepare and configure data for every possible user persona and purpose, in a way that is personalized to each stakeholder.

## What is a shared agile data layer?

A shared agile data layer is a central repository where data from any source or solution can be onboarded, processed, and uniquely configured by any user for any particular business purpose.

CRMs, CDPs, marketing automation platforms (MAPs) and other systems of records are incredibly powerful and useful tools, but they are also blunt instruments designed for singular purposes.



The addition of a shared agile data layer allows you to extend their capabilities without additional coding or compromising their functional and computational integrity. A data record in your CRM may, for example, give you a full picture of a contact – who they are, their interests and online actions – but it is of little utility if you can’t add important context like whether they belong to a targeted buying group or important sub-vertical, or readily use the data in a downstream GTM motion or technology. A shared agile data layer allows you to take that data from your CRM, format, link, add the necessary business context, and then immediately apply it to any use case or technology, according to each stakeholder’s requirements at that particular point in time.

## The importance of multi-vendor enrichment





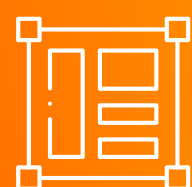

After data is cleansed, standardized, and unified from all your sources, it needs to be enriched. To get the best quality data to feed into marketing campaigns and sales outreach, a multi-vendor enrichment strategy is required. The optimal approach enriches your records from all your sources, such as first-party data (including from non-GTM systems like Outlook or Gainsight), third-party vendor data, open data from public sources (e.g. Dept of Labor Form 5550 for employee benefits, NPPES NPI Registry for healthcare), and web data via AI-automated searching and crawling. This strategy also requires metrics that enable you to understand how enrichment is improving your data quality and justify the spend to your leadership team.

With a single RDA platform that can access, extract, and load data specific to your GTM needs, data enrichment goes from being a painfully ineffective process to a simple, efficient advantage.

While a shared agile data layer should be easy to configure and use, the technology behind it is typically quite complex. From multiple connectors that abstract the complexity from integration to automation that keeps the data clean and synced between systems, shared data layers comprise a web of advanced technology that would be difficult and costly for a business to build and maintain itself.

Here are the primary technical capabilities and features you'll need.

## Technical requirements

-  **Enterprise cloud infrastructure** backed by easy, ironclad access, data privacy, and security policies and procedures
-  **Hub-and-spoke architecture**, with the data automation platform at the center, working in conjunction with a data warehouse or data lake, or standalone
-  **Large reference data catalog** that can be shared across the community of ops users
-  **Built-in automation** enabling enrichment, data routing, and scoring – ensuring accurate and timely data handling
-  **No-code templates and controls**, democratizing access and utilization
-  **Multi-vendor enrichment** with a waterfall methodology to ensure quality and high match rates

# Mastering data movement: the role of data orchestration in RevOps

Raw data doesn't provide much value on its own. That's why the entire ETL (extract, transform, load) category was created: to extract, transform, and integrate it.

The problem with most ETL solutions, however, is that while extremely flexible, they typically require deep technical expertise to set up and maintain. They are also primarily focused on the movement, not transformation, of data. RDA platforms offer a more tailored alternative with embedded, purpose-built AI and no-code data orchestration capabilities created specifically for marketing and sales use cases, systems, and ops teams.

## What is RevOps data orchestration?

Data orchestration combines processes and technologies that businesses use to unify, cleanse, enrich, standardize, transform, and integrate data from multiple sources, including first-party, third-party, and open-source data.



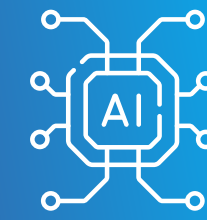
While RDA platforms use many of the same technologies as IT solutions, such as data pipelines, tables, and connectors, their ease of use, embedded AI models, and marketing and sales focus separate them from the latter.

RDA platforms are designed for sales teams and marketers. They ideally come out of the box with a comprehensive library of templates and recipes to prepare and continuously ready data for a range of downstream GTM activities like scoring, routing, and attribution, as well as account-based marketing (ABM) and marketing campaigns.

That can be invaluable to revenue teams, which have as many as 100 sales and marketing tools in their tech stack and need a fast and easy way to ensure the quality of their data and ready it for any strategy, automation, or technology.

Here are the primary technical capabilities and features you'll need.

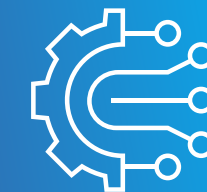
## Technical requirements



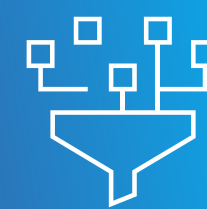
**Embedded AI** with models purpose-built to support RevOps processes, such as engagement, data classification, job title segmentation, and contact data scraping



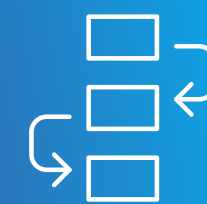
**Comprehensive roster** of technology partners and partner solutions



**Large connector library** and well-documented APIs, supporting real-time and bulk integration



**Data ingestion** and transformation to pull in, cleanse, deduplicate, normalize, and enrich data from any source, thereby improving quality



**Customizable workflows** that can scale and adapt to changing business needs

# Streamline and scale: process automation for effortless operations

The more data you have, the less time you have to do something with it. Unfortunately, most RevTech meant to help save time and resources only costs you more of each. The problem is that you can't automate incompatible data between systems. Nor can you run downstream processes trouble-free in CRM and marketing automation systems that are not meant for them.

RDA platforms solve both problems with orchestrated automations that unify and process your data without putting additional stress on your teams or critical sales and marketing systems.

## What is RevOps process automation?

RevOps process automation is the collection of sequences, templates, and workflows to programmatically operationalize and align your data and technology. It allows marketing and sales to automate and safely test the full cycle of RevOps business processes.



With it in place, users can seamlessly route, segment, score, assign, attribute, and match leads to accounts without error or manual intervention.

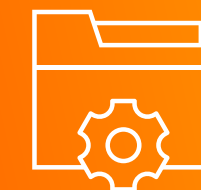
Unlike legacy fragmented and siloed RevTech, RDA platforms allow you to build automated processes that span different systems, data silos, and engagement channels, not only sales or marketing records but also first- and third-party data. Built-in orchestration ensures the data being automated is clean, standardized, up-to-date, and synced across systems. And pre-built and customizable templates allow you to easily automate the most common use cases while giving you the flexibility to handle more complex data points and scenarios.

Here are the primary technical capabilities and features you'll need.

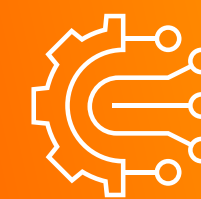
## Technical requirements



**Robust, secure cloud platform** to manage and automate processes



**A comprehensive library** of programmatic recipes and templates to automate workflows



**Extensive, no-code integration** with various tools and systems for comprehensive data management, including the ability to integrate with most commercial or custom services via REST API



**Ability to expose a workflow** as an API to simplify integration with other systems



**Non-production sandbox environment** for safe testing and iteration

# Fostering insight: democratizing data engagement for better decision-making

Until recently, data was under the strict dominion of IT, and any request from marketing or sales required a new project and long lead times. While new technologies have improved the accessibility of data, timely and complete access to data is still a challenge for most revenue teams.

By design, RevTech stacks segregate data in multiple silos and restrict access by solution. RDA platforms, however, are built to democratize data and use embedded data engagement to extend access and insights to any authorized system or team, whenever and wherever they need it.

## What is RevOps data engagement?

RevOps data engagement is the combination of data governance and application interface technologies. It provides no-code templates that allow RevOps teams to build secure applications and services that connect teams to vital data, systems, and processes they would otherwise be restricted from, or push data to the systems they already use.

Embedded data engagement ensures mission-critical data and systems are available to anyone in the enterprise who needs them – only the data they need, when they need it. It allows RevOps business users with no coding skills to create custom web apps, APIs, and other services that empower sales, marketing, and even other RevOps team members to interact with the data in any number of ways.



By enabling secure, compliant, and easy-to-use access to data and self-service data interactions, operations teams no longer have to be burdened with being the technology and data help desk.

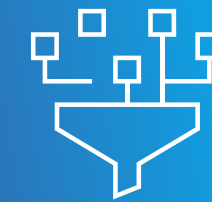
**Common use cases include:**

- **Publication of a web app** that allows users without CRM or MAP access to view, amend, or even add records to the portion of the database within their purview
- **Deployment of a custom API** that automates the lead-to-account matching process
- **Development of an interface** that allows Demand Gen to build custom lists for the campaign team without full platform access or a supplemental prospecting portal

In addition to providing no-code templates and other app-building tools, RevOps data engagement provides all the necessary supporting capabilities like security, authentication, scalability, throttling, and 24/7/365 availability – without additional IT infrastructure.

Here are the primary technical capabilities and features you'll need.

## Technical requirements



**Ability to convert** any automatable RevOps process into a custom API



**Ability to create** simple end-user applications that enable easy access to data



**Embedded operational analytics** and reporting tools for easy data visualization and exploration



**Platform infrastructure** and guaranteed uptime without the need to deploy an API gateway or other technologies and support



**Comprehensive governance policies** and procedures to secure sensitive data while still enabling broad access

# Tracking what matters: measurement and instrumentation for RevOps

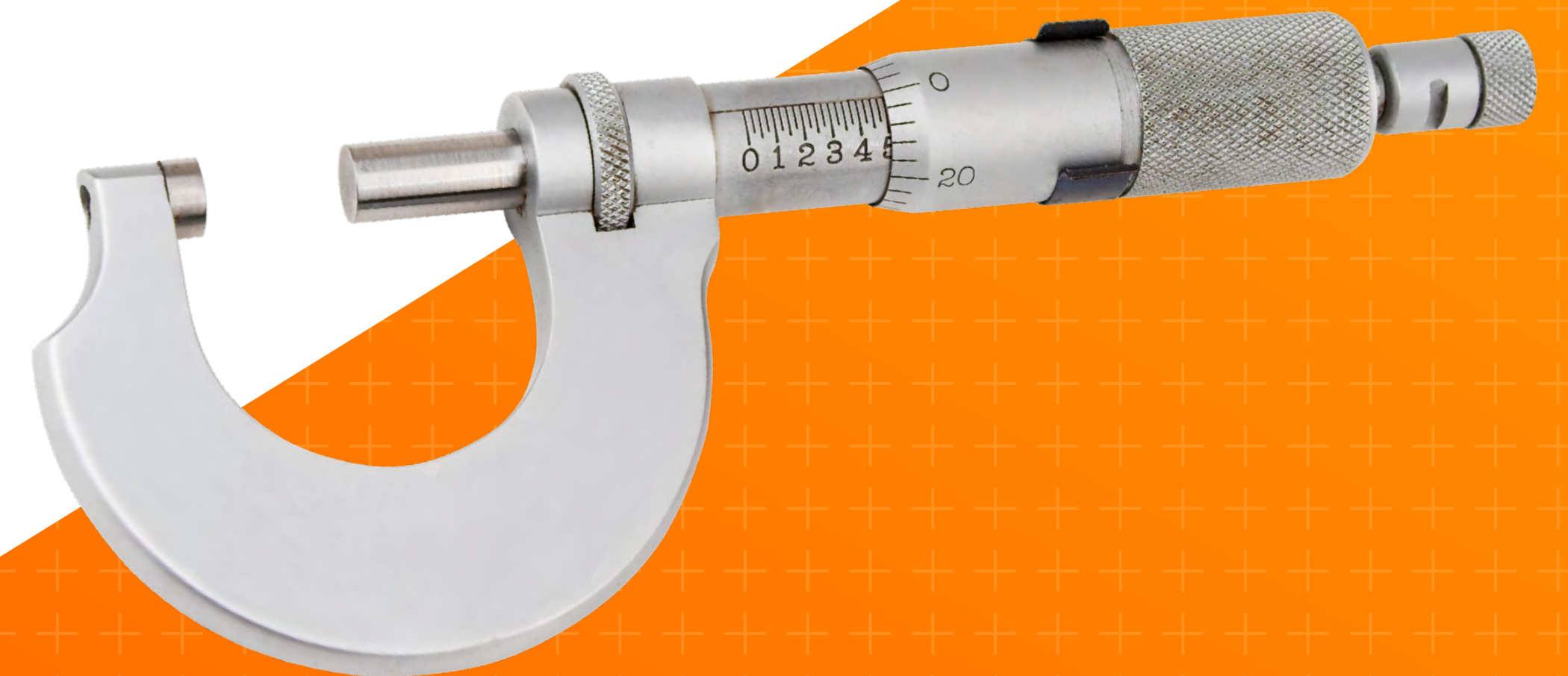
You can't measure and improve what you can't see. For all its advanced features and capabilities, a defining characteristic and critical limitation of legacy RevTech is the insufficient and fragmented visibility it gives into the overall state of your data and automated processes. Sure, your CRM or data cleansing tool may have a health check, but it typically doesn't provide much insight beyond the number of duplicates and is limited to the data that's imported to the specific tool at that exact time.

Alternatively, RDA platforms provide comprehensive measurement and instrumentation for all your data, regardless of where it resides. With only 9% of marketing and sales leaders expressing satisfaction with their data quality,<sup>1</sup> measuring and benchmarking total system health is essential to any project to improve it.

## What is RevOps measurement and instrumentation?

RevOps measurement and instrumentation combines the technologies used to capture, store, analyze, report, and extend the metrics required

to measure, assess, and improve data quality and process performance. These metrics typically include data completeness, error rates, duplicate data values/fields, normalization rates (i.e., percentage of records that use the same data field format), and recency, as well as speed-to-lead, funnel metrics, and other process performance analytics.



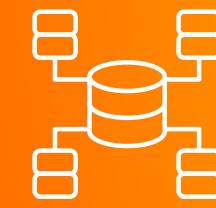
<sup>1</sup>[2024 State of RevOps Survey](#)

In addition to capturing these metrics, your RDA platform should include built-in reporting and dashboards for users to measure, analyze, and share the findings. They should also come with APIs and other connectors to extend the data to BigQuery, Looker, Tableau, Microsoft Power BI, and other business intelligence (BI) tools for deeper analysis.

Understanding your data quality level is important, but that knowledge doesn't add much value without the right tools to improve it. Here is where an RDA platform can really prove its value by turning insight into action. At a minimum, your solution should have built-in data management and preparation software to fix problems manually. But best-in-class solutions take it a step further, providing non-production environments for you to iterate and test, as well as automation to eliminate errors and inaccuracies.

Here are the primary technical capabilities and features you'll need.

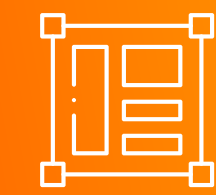
## Technical requirements



**APIs, tools, and systems to connect data** from various sources, such as sales and marketing platforms



**A comprehensive platform** that supports data capture activities



**Basic data visualization** and dashboarding capabilities, plus support for calculating custom metrics



**Technologies to automate data processes**, including data ingestion, transformation, and delivery



**Mechanisms for ensuring data quality**, including cleansing and enrichment

# The shift to lights-out automation: how RDA platforms make AI automation more automatic

AI and large language models (LLMs) are transformative technologies that have the potential to affect almost every aspect of our daily experience. The availability of free and public models is already changing so much about how we work, allowing businesses of all sizes to be smarter and more efficient across almost every discipline.

However, despite the hype and widespread adoption, AI is not yet close to becoming the all-encompassing and automatic answer many believed it would be. Recently, much has been made about its fallibility, hallucinatory tendencies, and propensity to make things up as it goes. There's a good reason most of the AI solutions on the market are branded as "assistants" or "co-pilots." They simply cannot be trusted to run without close human supervision. This is especially important for [RevOps operations and processes](#) where precision and accuracy are of paramount importance.









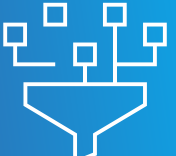

## What is AI for RevOps?

AI for RevOps simply and seamlessly solves the problem of how to successfully integrate AI and language models into RevOps processes like data cleansing and orchestration without code, a heavy lift from IT, or extensive human intervention. Unlike co-pilots and other public models, which rely on human supervision, AI for RevOps leverages non-AI automation technologies to produce the predictable, repeatable outputs required for RevOps processes. These include automations to ensure the quality of the data being prompted, pre-built and tested prompt templates constructed specifically for RevOps tasks, automated inspection and remediation mechanisms, and output handling and monitoring.

While no system is perfect, these features make it possible to move AI-driven RevOps processes closer to the engineering concept of lights-out automation, where no human involvement is necessary except for monitoring the output.

Here are the primary technical capabilities and features you'll need.

## Technical requirements

-  **Hosted language models** preselected for their suitability with data quality use cases
-  **Data control** to ensure no customer data leaves the platform or is exposed to the public or vendor
-  **Policy guardrails** restricting data and prompt usage to minimize budget impact
-  **Automated AI prompt construction** with dynamic system data for common RevOps use cases
-  **Native connectivity** with external, internal, and embedded AI services, including models, AI-powered search, and agent frameworks
-  **Data automation** to unify, cleanse, enrich, transform, and enable the construction of prompts using enterprise data
-  **Ability to remediate AI hallucinations** using AI and non-AI options
-  **Ability to validate AI responses** for hallucination and failure to follow instructions

# Driving smarter decisions with unified RevOps data

In just a short time, RevOps has gone from a niche, part-time discipline under sales or marketing to a major role within 68% of organizations.<sup>2</sup> It was born out of necessity as a way to merge and unify sales and marketing data, tools, processes, and teams so businesses could better understand their customer experience and make smarter investments and decisions to improve it and ultimately accelerate revenue. Its emergence and rapid growth not surprisingly parallel businesses' increasing struggle to extract value from their customer data.

A byproduct of RevOps growth is the emergence of new technologies like the RDA platform to support it, as it has become increasingly apparent that every RevOps problem is a data quality problem. Unlike traditional RevTech's fragmented, siloed approach, which is at the root of the data quality crisis, RDA platforms seek to unify and democratize both data and access. The technology to clean, transform, and operationalize data is widely available to any company, but the leading RDA platforms are more than the sum of their capabilities. Knowledge, service, and experience are equally important. Your platform must enable self-service and scale while providing expert support and managed services for more complex needs and use cases.

<sup>2</sup>[2024 State of RevOps Survey](#)





# How an RDA platform supports your GTM activities and solutions

The market is filled with single-point ETL, enrichment, routing, attribution, and other operational solutions. While these may check the box and allow you to get the job done at a basic level, they don't have the infrastructure, RevOps focus, and managed services to fully support your growth and enable the advanced and AI-driven GTM activities and motions now required.

With data quality emerging as the critical foundation for success, RDA platforms offer a transformative path forward.

## **Why Openprise stands apart**

Openprise delivers what modern revenue teams need: a comprehensive, AI-powered RevOps Data Automation Cloud purpose-built to solve today's complex data challenges. What makes Openprise uniquely powerful is how its components work together as an integrated system, creating exponential value that siloed point solutions cannot match.

**Openprise’s integrated approach transforms typical RevOps challenges through a connected ecosystem:**



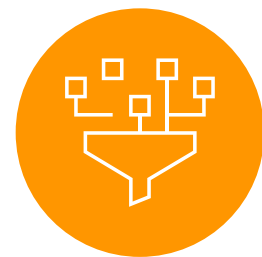
**Data quality** solutions create a solid foundation through cleansing, standardization, and deduplication



**Multi-vendor enrichment** adds depth and context from all your sources through automated acquisition, enrichment waterfall, and data fracking methodologies



**Data orchestration** connects these enhanced datasets across your tech stack, creating no-code, seamless, unified management between systems



**Funnel automation** operationalizes this high-quality data into revenue-generating processes



**Account administration** and **analytics & attribution** complete the circle, delivering measurable outcomes

**Future-proof your RevOps**

As RevOps evolves and AI-driven go-to-market motions demand unprecedented data quality, Openprise’s no-code approach puts control in the hands of revenue teams rather than IT specialists. By choosing Openprise, you’re embracing a fundamentally different approach to RevOps – one where data quality drives everything, processes scale effortlessly, and your teams are empowered with the insights they need to accelerate revenue growth.

For RevOps	For MarOps/SalesOps	For Ops/IT	For MarOps/SalesOps	For SalesOps	For DataOps/Analytics
<b>Data quality</b>	<b>Multi-vendor enrichment</b>	<b>Data orchestration</b>	<b>Funnel automation</b>	<b>Account administration</b>	<b>Analytics &amp; attribution</b>
Cleansing	Contact/Account waterfall	Connectors & integration	Matching	Account Hierarchy	Data preparation
Standardization	Automated acquisition	Data onboarding	Scoring	Account Grading	Attribution
Deduplication	Automated enrichment	List loading	Routing	Account & Territory Admin	Campaign performance
Segmentation	Account hierarchy	Data unification	Mechanized PLG funnel	Territory Planning & Simulation	Custom metrics
Governance & compliance	Open data	Data pipeline/ETL	Buying group automation	ICP/TAM Analysis	Operations dashboard
CDP master data	Data fracking	Supplement native sync	Champion mover	CRM Bulk Updates	Snapshots & trending

## About Openprise

Openprise is a leader in RevOps data quality, helping companies transform their go-to-market data into data they can trust, take timely action on, and make the right decisions with. At Openprise, data is at the center of what we do. First and foremost, we're data nerds. We believe high-quality data and great processes are core to a thriving business. We're here to free marketing ops, sales ops, and RevOps teams from the complexities of bad data so they can navigate change, capitalize on new opportunities, and outpace their competitors. Revenue leaders from Fortune 500 and fast-emerging enterprise companies depend on Openprise and our industry-leading partner ecosystem to drive competitive advantage. Openprise has offices in San Mateo, CA and in Hyderabad, India.

To learn more about Openprise, visit [www.openprisetech.com](http://www.openprisetech.com) and follow us on [LinkedIn](#), [X](#), and [YouTube](#).

[Download the RevOps data automation platform evaluation worksheet to align your team on the capabilities that matter.](#)

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