**Revenue Operations Specialist**

**Overview**

The Revenue Operations Specialist is a hybrid role responsible for optimizing the end-to-end revenue process across sales, marketing, and client success. This position manages CRM systems ([CRM System Name]), marketing automation ([Marketing Automation Platform Name]), client success platforms ([Customer Success Platform Name]), and other tools, while implementing and maintaining processes that drive revenue growth, improve efficiency, and ensure alignment across the revenue organization. The ideal candidate is technically skilled, process-oriented, and comfortable balancing tactical execution with strategic insights.

**Key Responsibilities**

**CRM & Systems Administration (50%)**

* Administer and optimize [CRM System Name], including user management, roles, permissions, workflows, reports, and dashboards.
* Manage integrations with marketing automation, customer success platforms, BI tools, and iPaaS solutions.
* Ensure data integrity, perform regular audits, and maintain clean and accurate records.
* Troubleshoot issues and implement system enhancements to support revenue processes.

**Sales Operations (15–20%)**

* Support pipeline management, lead routing, opportunity governance, forecasting, and territory assignments.
* Provide reporting, dashboards, and analytics to sales leadership.
* Partner with sales teams to identify process improvements and efficiency gains.

**Marketing Operations (15–20%)**

* Manage campaign execution, workflows, lead scoring, and attribution in [Marketing Automation Platform Name].
* Ensure accurate lead handoff to [CRM System Name] and proper segmentation for campaigns.
* Build reporting dashboards for marketing performance, funnel conversion, and ROI.

**Client Success Operations (15–20%)**

* Support client lifecycle processes including onboarding, renewal, and upsell tracking.
* Monitor client health metrics and provide actionable insights to account teams.
* Maintain client data and dashboards in [CRM System Name] and [Customer Success Platform Name].
* Implement processes to improve retention, adoption, and revenue expansion.

**Cross-Functional Collaboration & Enablement**

* Serve as the primary operational liaison across Sales, Marketing, and Client Success teams.
* Train and support teams on systems, processes, and reporting tools.
* Recommend improvements to workflows, processes, and technology to drive revenue performance and operational efficiency.

**Qualifications**

**Required:**

* Bachelor’s degree in Business, Marketing, Analytics, or a related field (or equivalent experience).
* 3–5 years in a revenue operations, sales operations, marketing operations, or customer success operations role.
* Hands-on experience and strong technical proficiency administering CRM systems, marketing automation platforms, and client success tools.
* Experience with reporting, analytics, and process improvement.
* Excellent analytical and problem-solving skills.
* Ability to manage multiple priorities across sales, marketing, and client success functions.
* Strong communication and collaboration skills to work across technical and non-technical teams.
* Detail-oriented, process-driven, and results-focused.

**Success in this Role Looks Like**

* Clean, accurate, and fully adopted data across all revenue systems.
* Efficient, scalable revenue processes supporting sales, marketing, and client success.
* Timely, actionable reporting that drives informed decisions across the revenue organization.
* Strong alignment and collaboration between sales, marketing, and client success teams.
* Increased pipeline efficiency, improved lead-to-opportunity conversion, higher retention, and revenue growth.