TACTICAL REVOPS

Revenue Operations Maturity Self-Assessment

Instructions:

For each question, select the answer that best describes your organization's current state. At the end, total your scores and calculate your maturity level.

Marketing Operations (MOps)

1. How well are marketing, sales, and customer success aligned on lead definitions and handoffs?

- 1 - No defined lead qualification process; handoffs are inconsistent.
- 2 - Some alignment exists, but there are frequent issues with lead handoffs.
- 3 - Well-defined lead qualification process with structured handoffs.
- 4 - Fully integrated lead management with automated workflows and real-time tracking.

2. How structured is your lead scoring and routing process?

- 1 - Leads are assigned manually with no clear scoring model.
- 2 - Basic lead scoring, but inconsistent usage.
- 3 - Standardized lead scoring and routing with defined criteria.
- 4 - Automated lead scoring and routing, optimized through AI-driven insights.

3. How well do you track marketing attribution across channels?

- 1 - No clear attribution model; marketing impact is unclear.
- 2 - Basic tracking, but attribution is inconsistent.
- 3 - Multi-touch attribution models are in place but need refinement.
- 4 - Advanced attribution with real-time reporting across all channels.

4. What best describes your marketing technology stack?

- 1 - Minimal tools, mainly spreadsheets and email blasts.
- 2 - Some marketing automation, but tools are disconnected.
- 3 - Well-integrated marketing automation, CRM, and analytics.
- 4 - Fully optimized martech stack with AI-driven recommendations.

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Sales Operations (SOps)

5. How standardized is your sales process from lead qualification to deal closure?

- 1 - No standardized process; each rep does their own thing.
- 2 - Some structure exists, but adoption is inconsistent.
- 3 - Defined and documented sales process followed by most reps.
- 4 - Fully standardized, optimized, and automated sales process.

6. How well do you manage sales forecasting and pipeline reviews?

- 1 - No formal forecasting process; pipeline visibility is poor.
- 2 - Basic forecasting, but accuracy is inconsistent.
- 3 - Regular pipeline reviews with data-driven forecasting.
- 4 - Advanced, AI-enhanced forecasting with high accuracy.

7. How confident are you in the accuracy of your CRM data?

- 1 - CRM data is unreliable and frequently outdated.
- 2 - Some data hygiene processes exist, but data is inconsistent.
- 3 - Regular data audits ensure CRM accuracy.
- 4 - Fully automated data validation and enrichment processes.

8. What best describes your sales tech stack?

- 1 - CRM is used minimally, with no sales automation.
- 2 - CRM is in place, but integration with other tools is limited.
- 3 - Well-integrated CRM with automation for lead management and reporting.
- 4 - Advanced sales tech stack with AI-driven insights and automation.

Customer Success Operations (COps)

9. How structured is your customer onboarding and retention process?

- 1 - No formal onboarding; each account manager handles it differently.
- 2 - Some onboarding structure exists, but it's inconsistent.
- 3 - Standardized onboarding and retention strategies in place.
- 4 - Fully automated onboarding with customer health tracking.

10. How well do customer success and sales collaborate on renewals and expansion?

- 1 - No coordination; renewal discussions happen reactively.
- 2 - Some collaboration, but processes are inconsistent.
- 3 - Well-defined handoff process for renewals and upsells.
- 4 - Seamless collaboration with automated alerts for expansion opportunities.

11. How effectively do you track customer health and satisfaction?

- 1 - No formal tracking; customer health is assessed informally.
- 2 - Basic tracking exists, but no proactive outreach is in place.
- 3 - Customer health scores are used to guide engagement strategies.
- 4 - Advanced analytics drive proactive engagement and retention strategies.

12. What best describes your customer success tools and automation?

- 1 - No dedicated CS tools; everything is managed manually.
- 2 - Some customer success tools exist, but they are not integrated.
- 3 - Well-integrated customer success platform with automated tracking.
- 4 - AI-driven customer success platform with predictive analytics.

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Scoring & Maturity Calculation

Step 1: Calculate Function Scores

- **Marketing Operations (MOps) Score** = (Q1 + Q2 + Q3 + Q4) ÷ 4
- **Sales Operations (SOps) Score** = (Q5 + Q6 + Q7 + Q8) ÷ 4
- **Customer Success Operations (COps) Score** = (Q9 + Q10 + Q11 + Q12) ÷ 4

Step 2: Calculate Overall RevOps Maturity Score

RevOps Maturity Score = MOps Score + SOps Score + COps Score / 3

Step 3: Determine Your Maturity Level

RevOps Maturity Score	Maturity Level	Next Steps
1.0 - 1.5	**Reactive (Low Maturity)**	Establish basic processes, improve data tracking, and define ownership.
1.6 - 2.5	**Emerging (Developing)**	Focus on integration, refine processes, and improve forecasting.
2.6 - 3.5	**Proactive (Optimized)**	Automate workflows, optimize sales pipelines, and leverage analytics.
3.6 - 4.0	**Predictive (Best-in-Class)**	Fully optimize RevOps with AI-driven insights, predictive modeling, and automation.

Next Steps:

- If your score is **low (Reactive/Emerging)** → Prioritize **process standardization and system integration.**
- If your score is **mid-range (Proactive)** → Focus on **automation and data-driven decision-making.**
- If your score is **high (Predictive)** → You are at **RevOps excellence**—continue optimizing with **AI and predictive analytics.**

Would you like to schedule a consultation to improve your RevOps maturity? Contact us at jsullivan@tacticalrevops.com or visit our website at https://tacticalrevops.com