

GROWTH GUIDE

Marketing & Beyond for 2022

How to Unite Marketing, Sales, and Service to
Delight Customers & Maximize Profits



Contents

CHAPTER 1

- 3** The Problem Facing Today's Business Operations

CHAPTER 2

- 8** The Solution: RevOps

CHAPTER 3

- 13** Implementing RevOps

SUMMARY

- 15** RevOps is the Path to Success

The Problem Facing Today's Business Operations

Optimizing the customer journey starts with **uniting your revenue departments** — Marketing, Sales, and Service — ultimately maximizing profits.

The Problem Facing Today's Business Operations

TO EARN THE BUSINESS OF POTENTIAL AND CURRENT CUSTOMERS, YOU HAVE TO SHOW THAT:



You understand their problems



You know the solutions to those problems



You have a product or service that will solve those problems




You will make it easy to access those services and solutions and add value to the relationship beyond the initial purchase



It's All About the Customer Journey

Focus your efforts on these **customer-centered ideals**, optimizing the customer journey and you will delight them. In turn, they will keep coming back to you to solve their challenges, and they will recommend you to their peers as brand ambassadors.



From crafting a well thought out marketing plan, to constantly coming up with new, innovative ideas to put us top of mind for our target audience, the Forecast Sunny team has excelled. I highly recommend their services.

— ELISA LABRAM
CEO, LaBram Custom Homes

It's All About the Customer Journey

Optimizing the customer journey starts with **uniting your revenue departments** — Marketing, Sales, and Service — ultimately maximizing profits.

However, a company whose revenue departments are fragmented will find it difficult to win customers and keep them happy. Some of the reasons for this difficulty include:

1

Sales departments are overburdened.

Sales reps need more time. Manually communicating during the sales process and having to search for the most up-to-date marketing materials is inefficient and time-consuming. Marketing materials saved on their computer are often out of alignment with company-wide messaging. They need automated processes and consistent ways to communicate with leads. Follow-ups need to be automated so no lead falls through the cracks and messaging remains consistent no matter how long the sales cycle lasts.

2

Marketing is understood and underutilized.

Service and sales teams may not have insight into everything their marketing departments do to connect with potential customers. Sales reps are often unaware of the latest marketing materials or aren't clear on ideal customer profiles or company goals. As a result, they may not use company-approved sales collateral. If the sales rep's communications are out of alignment with the overall marketing messaging they risk losing the lead's confidence, ultimately forfeiting the sales opportunity and company profit.

3

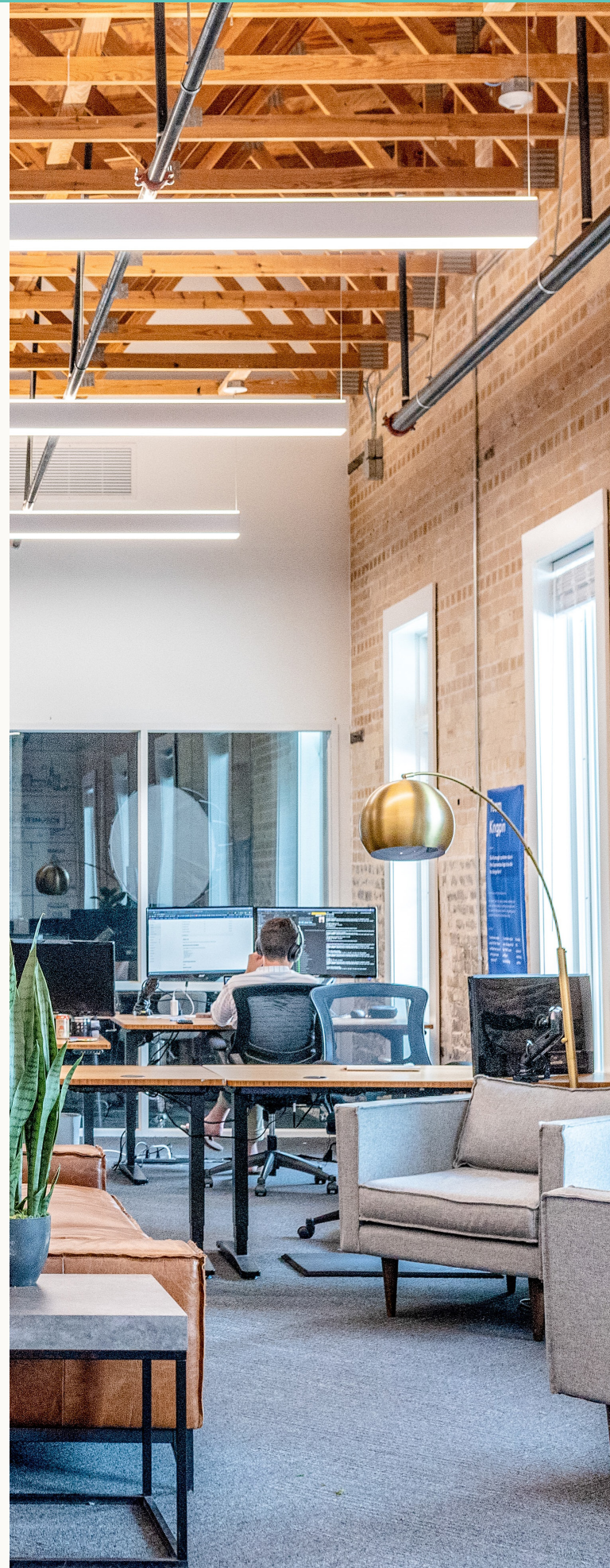
Service departments are generally not in the loop with the promises sales and marketing teams are making to customers.

This is a recipe for disappointing the customer, discouraging them from future purchases or recommending your brand to their colleagues. Most profit opportunities are missed at this stage of the buyer's journey. The service department has the most potential for return on investment with proper support and processes in place.

4

No goal alignment across departments.

It's hard to turn a potential lead into a customer and a customer into a brand ambassador if department goals are not communicated and aligned. What is your process for nurturing a lead? At what point do contacts become MQLs and SQLs? How are customers transferred to your service department once a purchase is made? Disagreements or misalignments between departments on these issues will lead to disappointed prospects and disengaged customers, jeopardizing profit opportunities at each stage of the customer journey.



When Teams Don't Practice Teamwork

Let's illustrate this confusion another way. Imagine a customer is building a house and the subcontractors aren't communicating with one another. They all come to the job site and do their own work on their own schedule. And they do it without consulting one another.

For instance: the drywallers don't talk to the framers. The framers don't communicate with the teams running the plumbing and electrical conduit. Imagine how strange a house that's just a frame with full plumbing intact looks. The subcontractors separately communicate their individual team's progress to the homeowner. Unfortunately, their individual progress reports might not make sense when viewed as a whole.

Because by not coordinating their efforts, certain jobs were completed out of order and the entire project is in disarray.

Eventually, the customer sees what's going on. They sense the confusion. They become frustrated and cancel the contract if there's time. Or they'll suffer through the project to the end with one thing on their mind: They're never going to refer anyone to that homebuilder again.

Although this scenario is focused on Construction, the principles apply to most industries across their revenue departments (marketing, sales, and service). When communication is segmented and unaligned, the customer ultimately loses confidence and profit opportunities are lost.



The Solution: RevOps

The solution to this fragmentation is RevOps, which at Forecast Sunny stands for “**Revenue Optimization.**”

The Solution: RevOps

What is RevOps?

The solution to this fragmentation is RevOps, which at Forecast Sunny stands for “Revenue Optimization.” RevOps has one main job: to drive business growth by optimizing communication, developing efficiencies, and strengthening relationships across the customer lifecycle.

Think of it as a way to get your entire team on the same page. It’s a system for aligning your marketing, sales, and service teams so they are all following the same approach to delight customers and drive revenue. That approach informs a commitment to having one source of truth for all customer interactions.

The Benefits of a RevOps Approach

Every company, no matter its size, is working toward the benefits of RevOps, even if they don’t know it. No matter what business you are in, you are already “building the house” and trying to coordinate teams. The issue is how well it’s going.

When you create systems of communication across departments for transparency, and when you hold meetings to share departmental updates on the challenges they see and how they’re solving them, you’re applying RevOps.



The Result: Delighted Customers = Profit Growth

Everyone is Committed to Delighting Customers

When departments unite around one goal – delighting customers – they increase their revenue. By establishing standardized processes that are transparent and consistent, a company is better able to fulfill customers' needs at every possible touchpoint. They can reduce friction within processes and create an experience of continuity for the customer, one that includes consistent and customized communication.

Marketing By Itself Isn't Enough Anymore

The marketing department is more than a lead-generation machine. It is responsible for establishing valuable customer relationships (remember that CRM stands for Customer Relationship Management), which will carry across the sales process and throughout the entire life of the customer relationship via the service department.

Marketing supports the sales process through sales-informed messaging and through automated processes that keep the customer relationship healthy. This takes the burden of crafting custom messages off of the sales team and gives them more time to sell and generate revenue.

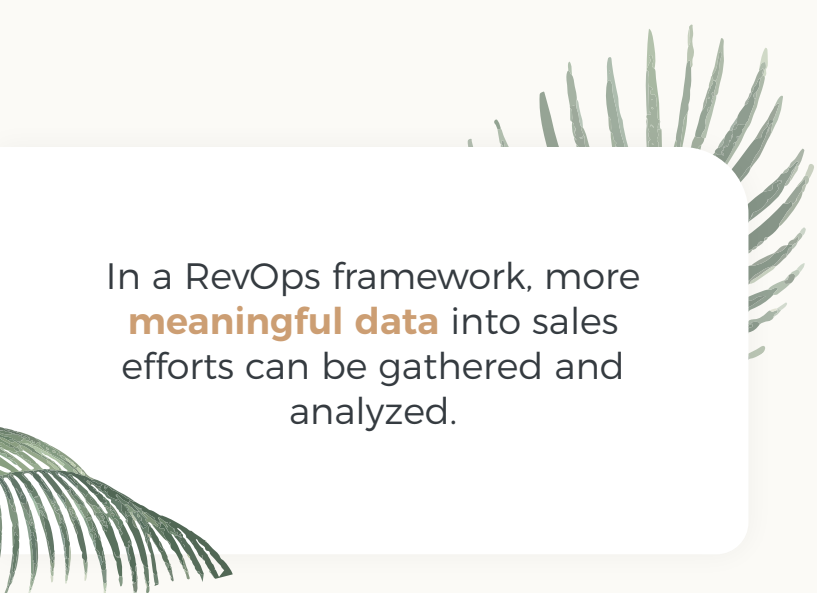
Marketing supports the service process by identifying opportunities and creating automated and customized communications to improve cross-sell opportunities. This process develops long-lasting relationships with customers who become brand ambassadors and increase the company's potential revenue.



Sales Can Finally Focus on Selling

Sales teams don't have to spend so much time performing manual day-to-day tasks, instead this is achieved through automated processes. They also have access to company-approved marketing content that can be sent instantly to maintain consistent company messaging.

In a RevOps framework, more meaningful data into sales efforts can be gathered and analyzed. Points of friction can be identified and processes can be made more efficient and timely to maximize the volume of sales opportunities per sales rep.



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The Service Department Realizes Its Full Potential

Service is more than just “putting out fires,” reacting to issues, and onboarding new customers. In a RevOps framework, Service strengthens relationships with customers through automated, intentional processes that are consistent and deliver on the promises made throughout the customer journey.

The service team now has transparency into the communications with the customer throughout their journey. By seeing the big picture, each service team member knows how to continue the conversation in order to directly contribute to company growth goals.


They are also given support via processes and automation that develops cross-sales, upsales, and future brand ambassadors, leading to a new set of profit opportunities.

The Goal: Creating Brand Ambassadors

Delighting Customers is the Key to Increasing Profits

Your primary goal as an ambitious company is delighting your customers. When customers feel valued at every stage of their interactions with you, they're more likely to move from marketing to sales to service, increasing revenue and eventually becoming brand ambassadors who send you new business.

The importance of brand ambassadors can't be understated because they promote your brand for free and "sell" on your behalf. Referrals from brand ambassadors are the highest-value prospects. This is why testimonials are prominently displayed on the homepages of company websites. Few things establish trust like a track record of success with those who buy your products and services.



"Forecast Sunny has been a great partner to work with; they helped us to scale quickly at the beginning, while still being forward-thinking to long-term goals."

— PAULA MALTEZ
Marketing Manager,
Hydro-Dyne Engineering

Implementing RevOps

There are four steps you can take to implement RevOps into your organization to start **reaching your growth potential**.

Implementing RevOps

THERE ARE FIVE STEPS YOU CAN TAKE TO IMPLEMENT REVOPS INTO YOUR ORGANIZATION:

1 Identify your company goals and objectives.

Figuring out your growth goals is a necessary first-step in creating unity across departments. Clearly define the company's short-term and long-term goals, so that each department has clarity as to what overall success looks like and how they can meaningfully contribute.

2 Define your target audience, their pain points, and a relevant content strategy.

Get input from all departments and identify your ideal customer profile and personas. Create meaningful content that resonates with your personas and customers. Automate the delivery of this crafted content so that it reaches them at the right times throughout the buyer's journey.

3 Audit your buyer's journey.

Get input from all revenue departments on the customer touchpoints they provide. Audit the processes your departments are using to create customer engagement and nurture them through their entire buying journey.

4 Find enablement technologies.

Identify technology that enables seamless transitions between departments across the customer lifecycle. This will ensure your teams understand and agree on how a customer moves from one stage to the next and what content or services should be provided to them at each level.

5 Create a plan that will align your teams and keep them together.

Define and implement a 12-month plan that ensures each department stays focused on the RevOps approach. This includes regular meetings that emphasize company goals and the role marketing, sales, and service play in the ongoing effort to achieve growth. Interpret the results of the RevOps efforts so you can continue to optimize and scale.

Summary

Revenue Optimization (RevOps) is the **path to your success** because it's your path to delighting customers.

Summary: RevOps is the Path to Success

Customers want meaningful relationships with the brands they choose to work with and won't accept less than that. If you're not committed to helping them succeed, they will look elsewhere.

Revenue Optimization (RevOps) is the path to your success because it's your path to delighting customers. And only by delighting customers can you grow as a business. Many businesses have already implemented its strategies. Even if you're late to the game, it's not too late to fix your operations.

To benefit from a RevOps approach, you have to understand what you do and how it connects to your buyer's journey. Unite your departments in an effort to understand that journey so you can create the content and activities that bring each person or company the solutions they're seeking.

Create a streamlined process so your company is working together as a team in response to that journey. Using the RevOps approach, you'll have a single

solution to see all the data and tools that track the flow of revenue through your business. You'll know what converts visitors to leads and leads to customers. And you'll show the sales, service, and marketing teams how their efforts affect the revenue pipeline.

We hope we've presented the benefits and elements of a RevOps approach in a way that's easy to understand. Refer to this e-guide frequently so that you can follow the steps for taking charge of your business and charting a course toward higher revenue.

Some of the advice here is meant to be general rather than comprehensive. If you need specifics on what tools to use to bring your teams together, and what best practices you can follow, we are here to help you. Contact Forecast Sunny and let us be your guide to reaching higher levels of growth and profits.



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