

REVENUE  
LEADER  
STORIES

# REVOPS REWIRED

Rethinking  
Revenue for the  
Digital Age

By Mark Lerner

## Preface

Hosting DealHub's RevAmp podcast has been an opportunity to explore the challenges, victories, and transformations within the world of Revenue Operations. The magic of the podcast lies in asking the right questions and being genuinely curious, rather than having all the answers.

In more than 40 interviews, I spoke with some of the most insightful revenue leaders from companies such as Gong, Miro, Atrium, and Zensai. They were willing to open up about their challenges, victories, and lessons learned in their careers. These were genuine discussions about thriving in the shifting environment of Revenue Operations. Our guests spoke about navigating economic upheavals, leveraging new technologies like AI, finding smart, sustainable growth strategies when old ways no longer applied, and adapting to the 'new normal' of remote work."

This book is a compilation of the most powerful lessons, insights, and real-world experiences from those conversations. It's meant for every professional in the RevOps community who wants to understand not just how to keep up with change, but how to leverage it. The leaders I spoke with shared stories of transformation—how they adapted their teams, strategies, and even their mindset to meet new challenges. For instance, one guest shared how their company shifted from an aggressive growth model to a more sustainable approach, focusing on customer retention and internal efficiencies, which ultimately led to stronger, more resilient growth. This shift reflects a broader industry trend: companies that have adopted RevOps models have reported up to 36% increased revenue growth, 28% higher profitability, and a 10–20% rise in sales productivity.

Their stories are inspiring, but more importantly, they are full of practical advice that anyone in RevOps can use to navigate this fast-moving field.

To all of our guests, thank you for your honesty, your expertise, and your willingness to share your experiences. And to you, the reader, I hope this book provides the same depth of insight, curiosity, and inspiration that I experienced during these conversations. The world of Revenue Operations is changing faster than ever, and it's up to us to adapt, evolve, and continue leading the way.

— *Mark Lerner*

## Chapter 1

# The Perfect Storm

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When the winds of change blow, some build walls while others build windmills.

The past few years have shown us how powerful those winds can be. Our choices—whether to resist or harness that power—determine whether we thrive or falter.

This book is about those who chose to build windmills.

Because there's been a heck of a lot of wind these last few years.

# The Pandemic That Changed Everything

Do you remember the first time you heard about the novel coronavirus burning its way through China?

Or the first time you realized it wasn't limited to China, Italy, or another distant country.

It was everywhere.

I do. And I clearly remember thinking that nothing would ever be the same again.

COVID-19's impact on every aspect of our lives has no modern precedent. The last time the world dealt with a global pandemic on this scale was in 1919, but the world back then was nowhere near the interconnected, globalized world we operate in today.

It wasn't just a health crisis; it turned our entire world upside down.

Yes, the reality we all once knew was upended; how we live was altered thoroughly. But the way we work, too, has changed.

Suddenly, everything we knew about work and business was in flux.

Overnight, nearly all companies had to switch to entirely remote work. For some, that transition was relatively simple; for others, it became nearly impossible.

While the ecosystem for enabling remote work greatly benefited from this need, the workers, each of us, had to live in

a world that shrunk down to, often, a single room.

Sometimes, we didn't even have a room.

And let's not forget the challenge of having kids at home for an entire school year, along with the overwhelming anxiety brought by a global pandemic.

For businesses, it wasn't only switching to remote work or managing supply chain disruptions; it was a seismic shift that called into question long-standing strategies, particularly those centered on aggressive, unchecked growth.

As Brian Tully, Senior VP of Sales at LiveU, eloquently expressed when we spoke earlier this year, "COVID changed the way we perceive the normal of everything."

The pandemic forced a reset, compelling revenue leaders to adapt to a reality where the usual rules no longer applied. The focus shifted from rapid expansion to survival, from scaling fast to scaling smart.

Customers changed, too. The pandemic accelerated digital adoption, compressing a decade's change into just a few months. B2B buyers now expected seamless, real-time digital interactions, a shift that caught many businesses off guard.

The rise of digital platforms made it clear that the old, slow-moving sales cycles would no longer suffice in this new environment.

Technology has conditioned buyers to expect immediate, personalized experiences. The traditional, one-size-fits-all approach to customer engagement became obsolete almost overnight. Businesses had to quickly adopt real-time analytics

and leverage customer insights to meet these heightened expectations and deliver tailored solutions.

The pandemic also triggered a significant shift in spending patterns. With the rise of digital channels, online spending surged. Post-pandemic, many buyers still prefer these digital avenues.

This shift not only changed sales transactions but also how customer relationships were built and maintained.

One of the most striking changes was the disruption in brand loyalty. The convenience and value offered by digital channels led many buyers to experiment with new solution providers. Successful brands swiftly adapted to these preferences, offering new products and seamless, value-driven experiences.

These shifts highlight a critical truth for revenue leaders: the ability to adapt quickly to meet evolving buyer expectations is no longer optional—it's essential for survival.

The companies that thrived during this period recognized these changes early and adjusted their strategies accordingly.

## **Economic Upheaval and Its Ripple Effects**

When the pandemic hit, many in the business world prepared for the worst. But then something strange happened, especially in the tech industry: business boomed.

With the shift to work-from-home, the need for tools to support digitized workplaces and businesses skyrocketed. With the low interest rate environment and government-sponsored economic

stimulus, a massive influx of capital flooded the tech space. In that environment, many companies that should not have received initial or ongoing funding were able to close huge rounds.

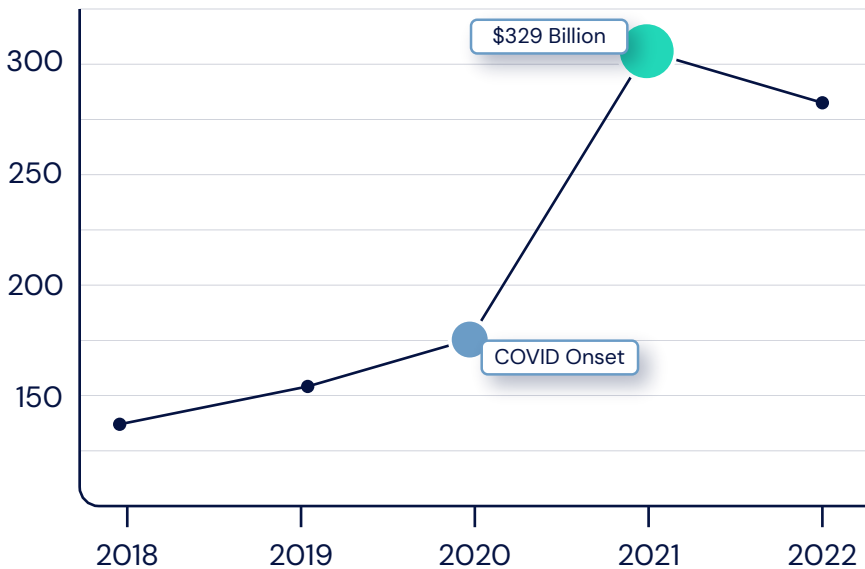
Those old metrics like Customer Acquisition Costs (CAC) or Lifetime Value (LTV) no longer mattered.

Let's take a walk down memory lane and look at some impressive numbers from those times:

- In 2021, venture capital-backed companies in the U.S. raised a record \$329.9 billion, almost double the previous year's \$166.6 billion (source: PitchBook and Bain).

## Statistic: **\$329.9 billion in Venture Capital Funding in 2021**

Total venture capital funding (in billions).



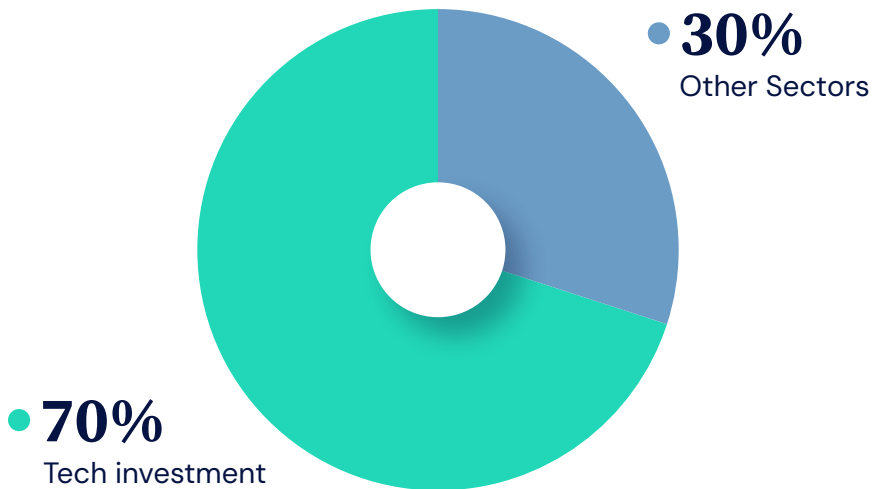
Source: PitchBook



- Investments in tech companies made up nearly 70% of total venture capital investments in the first quarter of 2021 (source: PitchBook and Bain).

Statistic:

## 70% of Total Venture Capital Investments in Q1 2021 Were in Tech



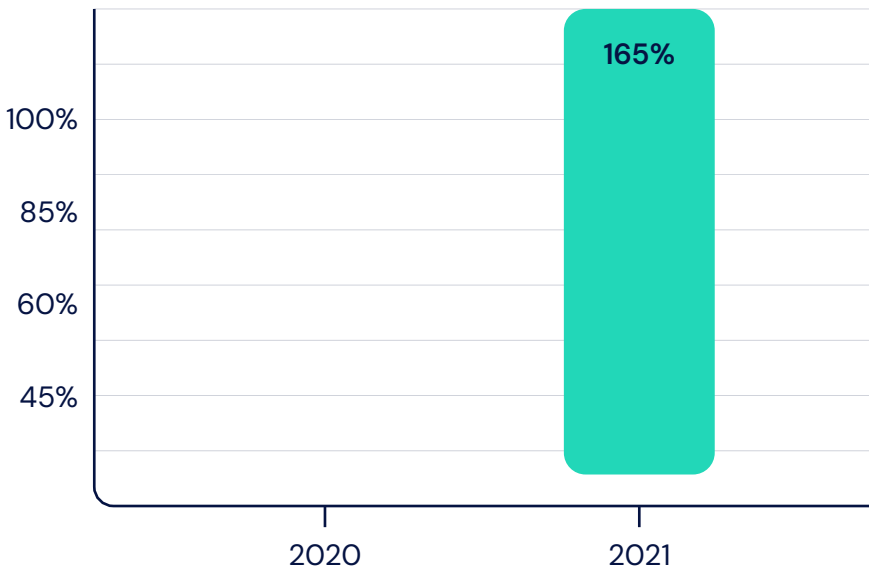
Source: Why Venture Capitalists Are Doubling Down on Technology | Bain & Company

- Late-stage deals saw a 165% increase year over year, indicative of a growing focus on more established tech startups (source: PitchBook and Bain).

Statistic:

## Late-Stage Deals Increased by 165% Year Over Year in 2021

Percentage increase in late-stage deals.

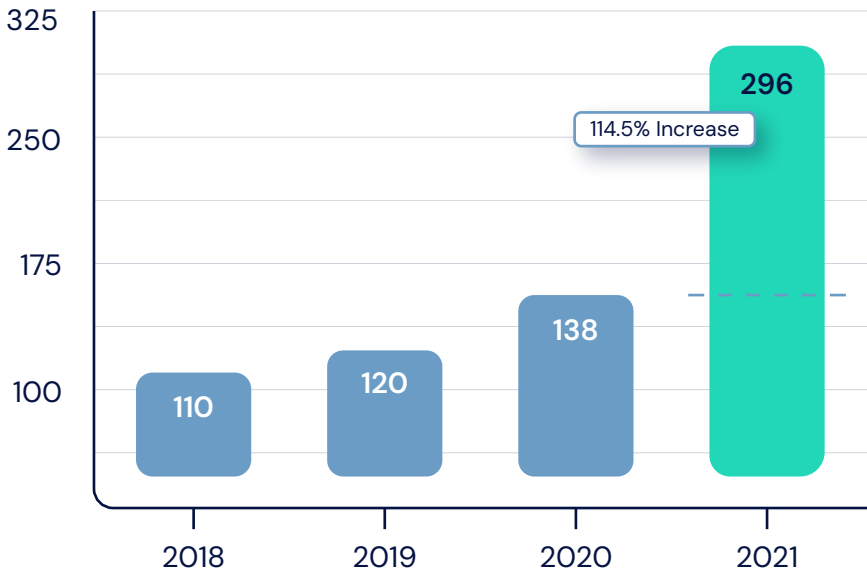


Source: Why Venture Capitalists Are Doubling Down on Technology | Bain & Company

- In 2021, there were 296 VC-backed IPOs in the U.S., a 114.5% year-over-year increase (source: PitchBook).

**Statistic:**  
**296 VC-Backed IPOs in 2021 (114.5% Increase)**

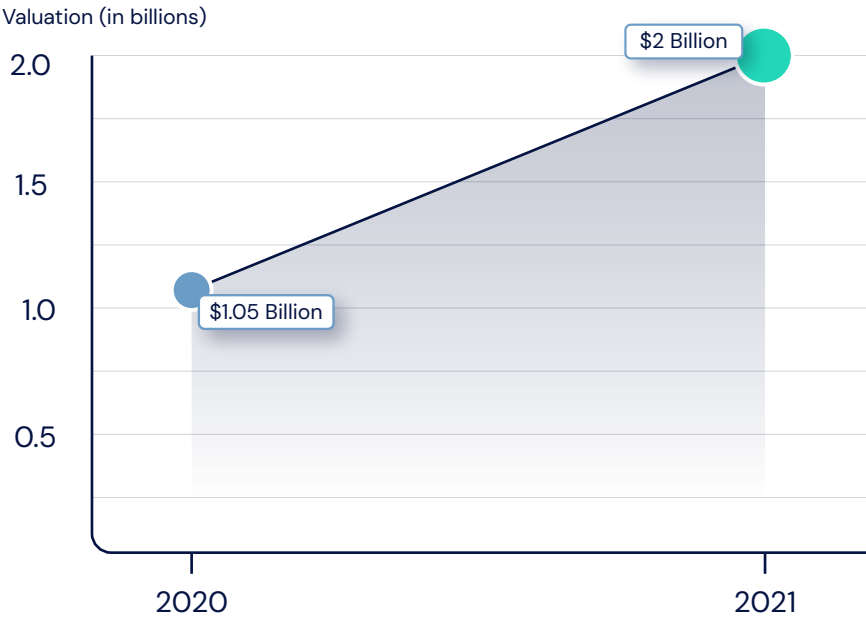
Number of VC-backed IPOs.



Source: Six charts that show 2021's record year for US venture capital - PitchBook

- Notable tech IPOs, such as Rivian, GitLab, and Aurora, contributed to this spike in VC-backed public listings (source: PitchBook).
- By the end of 2021, the average valuation of venture capital-backed firms exceeded \$2 billion, more than doubling from the previous year's \$1.05 billion (sources: S&P Global and PitchBook).

Statistic:  
**Average Valuation of VC-Backed Firms Reached \$2 Billion in 2021**



Source: Six charts that show 2021's record year for US venture capital - PitchBook

- The IT sector alone saw a valuation increase of \$1.7 trillion during this period (sources: S&P Global and PitchBook).

It was, alas, only a sugar high.

In 2022, the US Federal Reserve finally began to take action after months of contending that the highest inflation we had seen in 40 years was merely “transitory.” They instigated massive hikes in interest rates, which sent shockwaves through the economy, creating a ripple effect that’s hard to ignore.

Much like treating cancer with radiation, sometimes the cure is nearly as bad as the illness.

While interest rate hikes help lower inflation, they wreak havoc on economies.

The cost of borrowing skyrocketed, making it more expensive for companies to service their debts. The tech sector, once the economy’s most significant growth engine, was particularly hard hit.

After a decade of feasting on near-zero interest rates and easy access to capital, these firms felt the squeeze. Growth investments were slashed, hiring freezes became the norm, and many were forced to make deep cuts to keep up with their debt obligations.

The result? A wave of austerity measures and layoffs continues to reshape the business landscape.

Just as quickly as the capital flooded the market, it dried up.

Companies that didn’t pivot from “growth at all costs” to “scalable growth” found themselves in a tough spot, slashing

budgets, downsizing, and scrutinizing every dollar spent.

In the immortal words of Warren Buffet, “It’s only when the tide goes out that you learn who has been swimming naked.”

And there were a lot of naked swimmers.

Once mighty “unicorns” fell back to earth. Massive headcount cuts were seen across companies once thought immune to such things.

But, most importantly, the old mantra of “Growth at all costs” was, once and for all...

Dead.

It was a hard lesson, but those who adapted quickly navigated the storm more gracefully.

## The AI Revolution

As if the pandemic’s one-two punch, followed by massive economic headwinds, wasn’t enough, a third significant disruption came to the fore.

In November 2022, just as the first hints of sustained inflation became evident, the world was treated to its first taste of ChatGPT.

AI suddenly became the talk of the town.

I was not immune to its allure, and I’m sure many of you have had quite a few “aha” moments while interacting with large language models since then. No longer just a playground for tech geeks, AI

was now on everyone's radar.

But here's the thing—AI isn't magic.

This point has come up constantly over the last year in my discussions with our guests on the podcast. When I brought it up with Chirag Gulati, CEO and Chief Architect at RevSolutions and a decade-long specialist in the Salesforce admin space, he said, "AI is there... but if you don't have the data, AI cannot just create data for you."

The real challenge is figuring out how to operationalize AI in a way that delivers value, not just hype.

## Chapter 2

# Adapting to the New Normal



When I started these conversations with revenue leaders, I had no idea how much I'd learn. Each chat was like opening a window into a different world of problem-solving and adaptation. But one thing stood out: the ability to roll with the punches is critical to survival.

### Flexibility: The Secret Sauce of Success

Pete Kazanjy, co-founder of Atrium, drove this point home for me. Picture this: we're chatting about how jarring the shift was from an "easy money," low interest rate environment to a high-inflation, high interest rate world was. Pete leans in and says: "I think you have to be agile and respond to it. Whether that

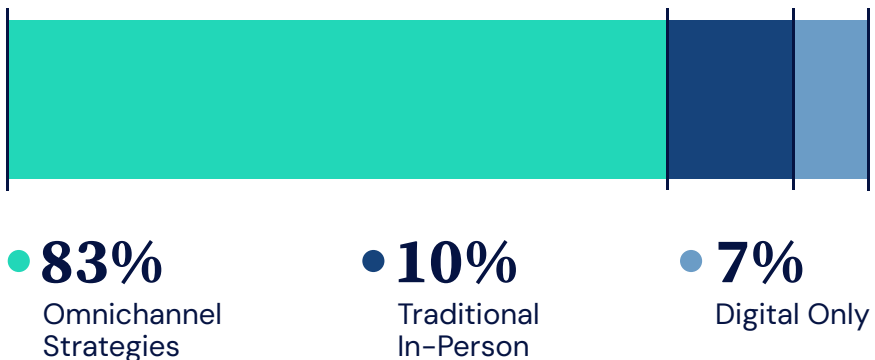


means, okay, budgets are drying up. People are fussier about their spending, meaning we need to refactor our discounting or approval workflows or whatever.”

It hit me then that flexibility is more than just significant strategy shifts. It’s about being willing to tweak even the most minor things to stay on course. This echoes broader trends in the B2B world, where flexibility is critical.

A [recent report](#) noted that [83% of B2B leaders](#) now believe that omnichannel strategies—letting customers choose between digital, in-person, or hybrid interactions—are more effective than traditional methods.

Statistic:  
**83% of B2B Leaders Prefer Omnichannel Strategies**



Source: It’s Official – Omnichannel is the Leading Approach to B2B Sales – Digital Doughnut

But it's not just about business processes. Amie Weizer, the Director of Global RevOps at Zensai, opened my eyes to the fact that flexibility must be baked into the company culture.

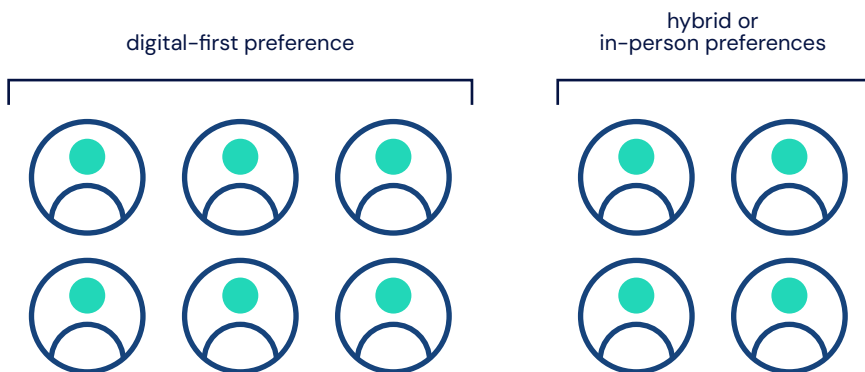
She told me:

"What we do is aim to bring human success to every employee. Human success is about creating unparalleled learning, growth and engagement for every employee. That means that we like to make sure that our employees are having human success just like our customers are."

I love this approach. Amie and her team realized that to bend without breaking everyone must be connected and supported. As companies embrace hybrid work models, research shows that [60% of B2B buyers prefer digital-first interactions](#), pushing organizations to be more flexible in how they engage customers and employees.

Statistic:

## 60% of B2B Buyers Prefer Digital-First Interactions



Source: The digital sales cycle is here to stay – here's how to embrace it | Marketing Dive

## Goodbye “Growth at All Costs,” Hello Smart Growth

Remember when “growth at all costs” was the battle cry of every startup? Yeah, those days are over. My chat with Jeremy Donovan, Executive Vice President of RevOps and Strategy at Insight Partners, hammered this home. Jeremy’s got a bird’s-eye view of the software investment world, and he didn’t mince words:

“As organizations have shifted from growth at all costs to efficient growth, that ethos and the actual strategy and operations behind that has shifted, has pushed its way down right into the rev ops organization.”

It’s not just about tightening belts. Jeremy made me realize it’s about rethinking what growth even means. He went on:

“Rev Ops leaders are paying a whole heck of a lot more attention to things that were more conventionally in FP and finance to understand what is the actual return or cost of various channels.”

This shift isn’t killing growth—it’s making it smarter. Research from Bain & Company shows that [80% of B2B leaders now focus on “targeted growth”](#) by doubling down on customer retention, data-driven marketing, and intelligent resource allocation.

Jeff Ignacio, Head of GTM Operations at Keystone AI, put it in a way that made me chuckle:

“If you’ve been in the startup world, every year has felt like a decade. We’ve had to tap dance and dodge a lot of different challenges out there.”

I love Jeff’s dance metaphor. It perfectly captures how rev ops folks have had to stay on their toes, ready to pivot at a moment’s notice.

## Data: The New North Star

Gone are the days when you could go with your gut. Every leader I talked to emphasized data’s importance in navigating this new landscape. But here’s the kicker—it’s not just about having data; it’s about making sense of it.

Nick Gollop, a seasoned RevOps advisor, really nailed this point when he said that having a single source of truth for data should be the North Star. But he also warned me about a trap many fall into:

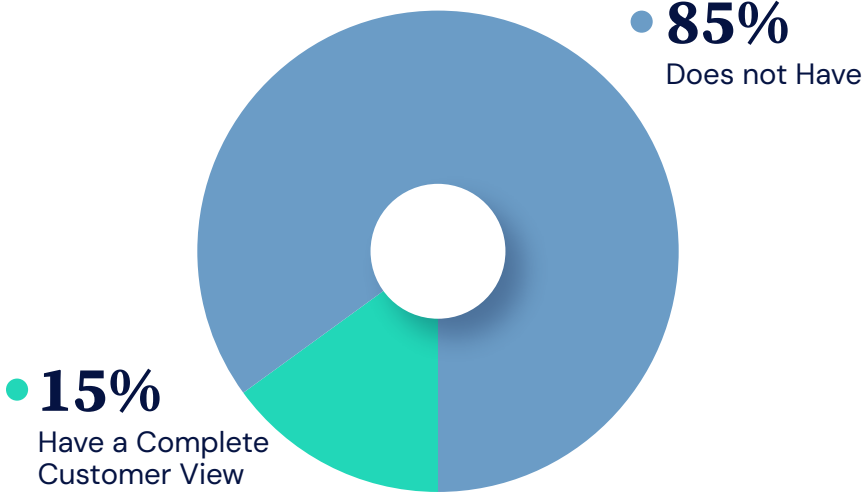
“The bigger you get, the more data you have, but the more noise you also have. So you get big, you can still have a lot of data and structure, but if you don’t really know how to harness that, it’s also pointless.”

It reminded me of trying to drink from a fire hose—sure, there’s plenty of water, but good luck not drowning.

The research supports this. According to McKinsey, [only 15% of B2B companies have a complete view of their customers.](#)

Statistic:

## Only 15% of B2B Companies Have a Complete Customer View



Source: 2020 Trends Report: Customer Centricity – B2B International

## Meeting Customers Where They Are

The pandemic didn't just change how we work—it completely upended how customers expect to be served. Today's B2B buyers are more digital-savvy than ever and expect seamless, tech-enabled experiences. James Eaton from Dozuki shared an insight that captures this digital transformation:

“Now we have to be much more creative in the way we approach prospects and the way we engage with them in every step of the opportunity lifecycle... The way I've approached this is how can I get smarter and how can I compress my sales cycle that much more so we can increase our pipeline velocity.”

James' observation cuts to the heart of how digital tools reshape B2B sales. It's not just about having a website or sending emails anymore. It's about using sophisticated digital tools to understand and predict buyer behavior, create intent, and engage at precisely the right moment.

Meeting your customers where they are—providing them opportunities to interact in ways they prefer—has never been more critical. Gartner recently found that [75% of B2B customers preferred self-service](#) rather than starting their decision-making process by contacting sales reps.

But adapting to customers isn't just about geography. Pete Kazanjy, co-founder of Atrium, dropped a term that stuck with me: "The important thing that we have to do as sales leaders and revenue operations people is be mindful of the change, but then also be mindful of... the term Lindy."

I had to look up "Lindy" after our chat. It's this idea that the longer something has been around, the longer it's likely to stick around. Pete's point resonated with me—yes, we need to adapt, but some good business and relationship-building principles are timeless.

## The Human Touch in a Digital World

AI and automation have been game-changers, no doubt. But as I talked to more leaders, I realized there's a tricky balance to strike between tech efficiency and that irreplaceable human connection.

Matt Volm from RevOps Co-op put the AI revolution into perspective for me:

"Here I am talking about AI in the podcast. ... At this time last year, I don't think anyone was talking about OpenAI or ChatGPT

or anything yet.”

It’s wild to think how quickly things have changed. Matt went on: “So, think about a year and a half ago, right? No one was, that was not a thing. So just look at all the things now that people are doing with that, all the companies that have just spun up in that space. And the fact that it literally seems to be the only thing that people can talk about, but you don’t need to understand any coding or developing skills to be able to leverage a tool like that to do your job.”

This democratization of tech is exciting, but it also made me wonder—where do we draw the line? How do we keep that human touch that makes sales and customer relationships unique? And Matt isn’t alone in this concern.

According to McKinsey, although companies have seen massive gains in efficiency by adopting AI and automation, [66% of B2B companies still need help to balance digital tools](#) with maintaining a personalized, human touch in customer interactions.

While AI can streamline processes, the relationships and nuances of B2B sales still require a personal connection.

## Wrapping Up: The Road Ahead

After all these conversations, one thing is clear: there’s no one-size-fits-all solution to thriving in this new normal. It’s about staying flexible, focusing on smart growth, leveraging data wisely, meeting customers where they are, and finding that sweet spot between tech and human connection.

The pace of change isn’t slowing down anytime soon. But if

there's one thing I've learned from these incredible leaders, it's that with the right mindset and tools, we can survive and thrive in whatever comes next.

In the next chapter, we'll dive into how companies reshape their revenue operations to tackle these challenges head-on. Trust me, this is about to get really good.



## Chapter 3

# Reimagining Revenue Operations



When I started in sales, “revenue operations” wasn’t a term. We had sales ops, sure, but what about the idea of a unified approach to revenue? That was still a pipe dream.

Fast-forward to today, and [Revenue Operations \(RevOps\) is the fastest-growing and most highly sought-after role in the United States.](#) According to recent studies, by [2026, 75% of the world’s highest-growth companies will have deployed a RevOps model](#)—a clear sign that this approach is here to stay.

### The Rise of RevOps: More Than Just a Rebrand

One of the most eye-opening conversations I had was with Jeremy Donovan, Executive Vice President of RevOps and

Strategy at Insight Partners. Jeremy's position has given him a unique broad view of the RevOps space:

"There's been the retitling of sales operations and the potential broadening," Jeremy told me. "I say the potential broadening because the truth is a lot of revenue operations still is sales operations, and I'd love to see some data on what those responsibility splits are."

Jeremy's point stuck with me. It's not enough to slap a new title on an old role. True RevOps is about breaking down silos and creating a unified approach to revenue generation. Research shows that companies using RevOps models are [1.4 times more likely](#) to exceed their revenue goals by 10% or more.

Jeff Ignacio, Head of GTM Operations at Keystone AI, echoed this sentiment, but with a twist:

"The term revenue operations doesn't yet exist in a lot of companies. It might also have a different naming convention, so go-to-market operations. I actually think that's a better word for it, but rev ops is the label that's kind of stuck."

It's funny how sometimes the names we choose can shape our understanding. Whether RevOps or go-to-market ops, the core idea is the same: aligning all revenue-generating functions under one umbrella. This shift is significant as businesses [increasingly realize that silos between sales, marketing, and customer success are growth inhibitors](#).

## Breaking Down Silos: Easier Said Than Done

If you've ever tried to get sales, marketing, and customer success to play nicely together, you know it's more complex than drawing a new org chart. I asked Shantanu Shekhar, Head of Revenue

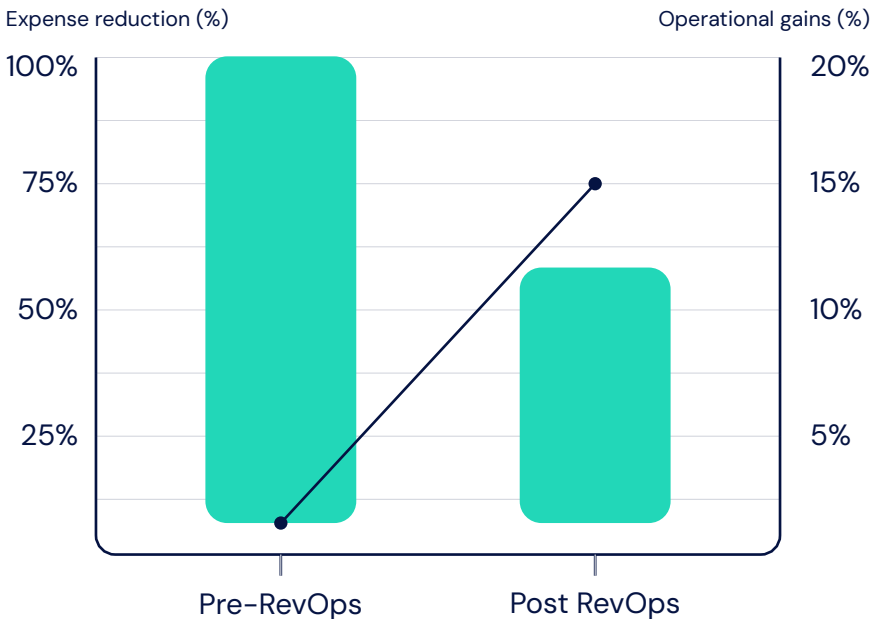
Operations at Personio and former Sr. Director, GTM Operations at Gong, about this challenge.

“I think there’s really two cores,” Shantanu explained. “One is making sure from a process side you’re set-up, and second from a system side.”

Shantanu highlighted that it’s not just about getting people to collaborate; it’s about creating systems and processes that make collaboration the path of least resistance. We see this play out in the stats—companies embracing a unified RevOps approach have seen a [30% reduction in go-to-market expenses](#) by streamlining operations and eliminating inefficiencies.

Statistic:

## Companies Saw a 30% Reduction in Go-to-Market Expenses with RevOps



Source: How Creating The Right Tech Stack Can Drive Revenue Growth

## The Data Dilemma: From Overload to Insights

Every RevOps leader I talked to mentioned data as a critical challenge. It's not just about having data—it's about having the correct data and knowing what to do with it.

With the rise of AI and machine learning, [predictive analytics is critical to making data-driven decisions](#) that optimize resource allocation and guide marketing and sales efforts.

As I reflected on these conversations, it became clear that the future of RevOps isn't just about collecting more data—it's about asking the right questions, focusing on the metrics that truly matter, and using advanced analytics to turn raw information into actionable insights. In a world of information overload, cutting through the noise and finding the signal is becoming the most valuable skill a RevOps professional can have.

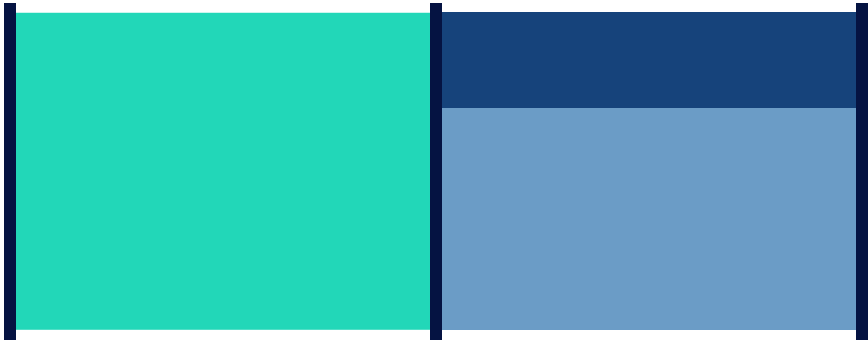
## The Tech Stack Tangle: Less Might Be More

Remember when having a tool for everything was the goal? Yeah, those days are over. The RevOps leaders I spoke with are all about simplification and integration now. They want to reduce waste, increase efficiency, and lessen the chances of tech debt in the future.

Here's a powerful stat that puts things into focus: In 2023, [companies wasted an average of \\$18 million on unused SaaS licenses](#), a 7% increase from the previous year.

Statistic:

## \$18 Million Wasted on SaaS Licenses in 2023



● **\$180M**  
Average tech  
budget in SaaS  
companies

● **\$18M**  
Wasted spending

● **\$162M**  
Effective spending

Source: SaaS license waste tops IT spend challenges | CFO Dive

Matt Volm, Co-Founder and CEO of RevOps Coop, shared a perspective that hit home:

“I am a big believer in, especially these days, just trying to consolidate tech stack, like avoid buying point solutions or technology just to solve a very specific thing.”

Matt’s point about the hidden costs of complexity struck a chord with me. It’s not just about a tool’s price tag but the operational overhead it creates. This simplification trend isn’t going away. As RevOps teams embrace more integrated tech stacks, they’re cutting inefficiencies and focusing on higher-value tasks.

## The Human Element: AI Isn't Everything (Yet)

With all the buzz around AI, you'd think human RevOps professionals might be worried about their jobs. However, the leaders I talked to see AI as a tool rather than a replacement. According to industry research, [81% of sales leaders believe AI can reduce time spent on manual tasks](#), allowing more focus on strategic initiatives. Pete Kazanjy had a refreshing take:

"I think what modern sales does is it's more about helping to facilitate go-to-market in a more fluid, more operationally excellent, more reduced customer acquisition cost version."

Pete's vision of using technology to enhance, rather than replace, human skills resonated with me. It's not about AI taking over; it's about AI making us better at what we do.

## The Human Element: AI Isn't Everything (Yet)

Reflecting on these conversations, I'm more excited than ever about the future of RevOps. Yes, there are challenges—breaking down silos, managing data, simplifying tech stacks, and integrating AI. But incredible opportunities exist to drive real, measurable value for our organizations.

The RevOps leaders who will thrive in this new landscape can balance the strategic and tactical, leverage technology without losing the human touch, and align diverse teams around a common goal of sustainable, efficient growth.

In the next chapter, we'll explore how these principles play out in practice, looking at real-world case studies of companies that have successfully reimaged their revenue operations.

## Chapter 4

# RevOps in Action: Success Stories and Lessons Learned



There's nothing quite like seeing theory put into practice. In my conversations with RevOps leaders, I've been struck by the innovative ways they apply these principles in the real world. Let's dive into some of these stories and see what we can learn from them.

### Scaling Smartly: Gong's International Expansion

One of the most fascinating case studies I encountered was Gong's approach to international expansion. Shantanu Shekhar, their former Senior Director of Go-to-Market Operations for International Markets, shared an eye-opening strategy:

“Let’s say we identify within Europe and APAC, a few English-speaking markets. Let’s start there first because you can translate your product a lot closer. The way you sell is similar; the marketing required, you have to translate.”

What struck me about Shantanu’s approach was its simplicity and pragmatism. Instead of trying to conquer the world all at once, Gong focused on markets where they could leverage their strengths. It’s a great example of scaling smartly rather than just scaling fast. This phased approach, focusing first on English-speaking markets, allowed Gong to enter new regions smoothly while maintaining operational efficiency.

Shantanu went on to explain:

“We had to start looking at whatever worked in the US. Would it work elsewhere? There are certain pieces that translate very easily, but then there are things around what’s the territory size, what’s the actual dollar quota per person.”

I was impressed by this attention to detail. Gong didn’t just translate its product for different regions—it adapted its entire go-to-market strategy, considering market-specific details such as quotas and territory sizes.

Their cross-functional “tiger teams” ensured every perspective—sales, finance, operations—was accounted for in decision-making. This focused yet flexible approach demonstrates how thoughtful expansion can lead to sustainable growth, a lesson applicable to any RevOps strategy.



# Data-Driven Decision-Making: Insight

## Partners' Approach

Jeremy Donovan from Insight Partners provided an approach to data that fundamentally changed how I view RevOps metrics. His key focus? Customer Acquisition Cost (CAC) payback.

“CAC payback. I think that’s probably the big one that RevOps people may not have been paying as close attention to that they are now.”

Jeremy explained that CAC payback wasn’t just about tracking sales and marketing expenses over new bookings—it’s about understanding how every part of the revenue process contributes to growth. He broke it down:

“So that’s sales and marketing expense over new bookings inclusive of new logos and expansion growth. And if you double-click on that, you’ve got sales expense, marketing expense, new logo growth, and expansion growth.”

This holistic approach to metrics, focusing on revenue and optimizing all stages of the customer lifecycle, is becoming more critical than ever. Jeremy’s emphasis on CAC payback highlights how RevOps teams can contribute to overall company efficiency by carefully tracking how dollars are spent across channels.

He added a crucial layer, explaining that the shift from “growth at all costs” to “efficient growth” is now the priority:

“RevOps leaders are paying more attention to things that were

conventionally in FP&A to understand the return on cost across different channels, not just sales.” This shift towards efficiency was critical for Insight Partners as they navigated changing market conditions.

## Building a RevOps Function from Scratch:

### Nicholas Gollop’s Story

Nicholas Gollop’s experience building a RevOps function from scratch is a great lesson in perseverance and strategic thinking.

“If you’re hired to be the first RevOps person to build a function, most of the things you do yourself, but that’s kind of expected. If you’re hired to then inherit and just maintain, that’s a different story.”

Nicholas didn’t just design an ideal function on paper—he rolled up his sleeves and lived it. His willingness to take on every role, from deal desk management to structuring operational workflows, allowed him to deeply understand the challenges of RevOps and implement effective solutions.

He shared:

“I had to centralize a deal desk function within myself... By doing that, I proved to the business that we needed a deal desk function, showing the amount of errors per order decreased from 30% to 2%.”

This hands-on approach paid off, proving the value of the RevOps function. His ability to scale the function over time while keeping error rates low is a masterclass in prioritizing tasks, even when resources are limited. For any RevOps professional starting from scratch, Nicholas’ journey shows how critical it is to gain

firsthand experience across all aspects of the operation.

## Balancing Technology & Human Touch:

### Atrium's Perspective

Pete Kazanjy underscored the importance of blending technology with human oversight, highlighting how sales performance has evolved:

“Sales is hard because there’s scarce purchasing resources that are being sought after by sellers...sales is a calorically intensive sport.”

Pete explained that while AI and data can help sales teams better target potential customers and improve efficiency, closing deals and managing client relationships still require human effort.

Technology supports but doesn’t replace the hands-on work of selling, where human intuition and relationship-building are essential for converting opportunities into success.

He further elaborated on how modern tools like CRMs and automation have transformed sales processes:

“That used to be a lot harder before we had prospect databases or CRMs, so that’s where sometimes you got bad sales behavior associated with sales.”

Technology has eliminated many inefficiencies by automating repetitive tasks, allowing sales teams to focus on what truly matters—building relationships and understanding client needs. However, Pete also stressed that despite these advancements, technology alone cannot deliver results.

Human creativity, empathy, and judgment are still the driving forces behind successful sales teams. AI may give sales professionals an edge by surfacing data insights and optimizing workflows. Still, the uniquely human qualities—adaptability, innovation, and relationship-building—turn those insights into lasting client partnerships.

Pete's perspective highlights the critical balance RevOps must achieve in this new era of sales. While AI and automation can streamline and optimize many functions, true success will always depend on humans' ability to engage creatively and personally with clients.

At its core, sales is still a human-driven endeavor where technology amplifies human strengths rather than replacing them.

## Cross-Functional Collaboration: Gong's Tiger Team Approach

Shantanu Shekhar shared Gong's approach to cross-functional collaboration, emphasizing the power of tiger teams.

"We actually created a tiger team... it had representation from finance, from operations, from someone who represented sales as well."

Gong streamlined processes and ensured everyone was aligned on critical workflows by bringing together representatives from multiple departments. This approach significantly reduced silos, allowing for faster decision-making and smoother execution across regions.

Shantanu shared that Gong didn't create a one-time tiger team. Instead, they established an ongoing cadence, meeting regularly to address new challenges as they arose. This flexibility allowed them to adapt quickly as they expanded into new markets, proving that collaboration across functions is critical for long-term RevOps success.

## Wrapping Up: Lessons Learned

As I reflect on these stories, a few key lessons stand out:

1. **Start small and scale smartly:** Gong's phased approach to international expansion is a perfect example of how focusing on markets where you can leverage your strengths leads to sustainable growth.
2. **Rethink your metrics:** Jeremy Donovan's focus on CAC payback highlights the importance of tracking holistic, cross-functional metrics in RevOps to optimize every stage of the customer lifecycle.
3. **Be willing to roll up your sleeves:** Nicholas Gollop's story of building a RevOps function from scratch develops firsthand experience, and a willingness to do the work yourself is crucial in the early stages.
4. **Use technology to enhance, not replace, human skills:** Atrium's perspective reminds us that the goal of RevOps tech is to make our human interactions more meaningful, not to automate them away.
5. **Break down silos with cross-functional teams:** Gong's tiger team approach shows how RevOps can bring different parts of the organization together, improving efficiency and driving growth.

These real-world examples show that while there's no one-size-

fits-all approach to RevOps, successful organizations apply common principles. It's about being flexible, data-driven, and focused on creating value across the entire revenue lifecycle. In our next chapter, we will explore the future of RevOps, delving into emerging trends and technologies that will shape the field in the coming years. Keep reading—the future of RevOps is more exciting than ever!

## Chapter 5

# The Future of RevOps: Trends and Predictions



Talking with leaders across the RevOps space, one thing has become crystal clear: we're just scratching the surface of what's possible. The future of RevOps is shaping up to be exciting, challenging, and full of opportunities. Let's dive into some of the trends and predictions in my conversations.

### The AI Revolution: Beyond the Hype

AI has been the buzzword on everyone's lips, but what does it mean for RevOps? Jeff Ignacio shared a perspective that got me thinking:

"I think we could probably crush that. I think we'll have better gains. What that means for businesses is you can operate with

fewer resources.”

Jeff’s point about AI allowing us to do more with less is intriguing. But he also cautioned:

“ChatGPT is an AI... I know they’re LLMs, they tend to hallucinate and become wrong, but at some point, that problem is going to be solved, right?”

AI holds immense potential to revolutionize RevOps, but we must recognize its limitations. Chirag Gulati, with his extensive Salesforce experience, added another critical dimension to the AI conversation:

“I think AI is going to still take time. ... Everybody is focusing on AI right now, which is a buzzword, but it starts with [structured] data.”

Chirag’s insight reminds us that while AI is powerful, it’s not a magic solution. The foundation of effective AI use in RevOps is still good, structured data. His point that much of today’s AI technology existed before the recent hype is a sobering reminder to focus on the fundamentals like data quality and structure. It’s a call to approach AI strategically, building on solid data practices rather than seeing it as a shortcut or quick fix.

## The Evolution of the Tech Stack

As we look to the future, the approach to tech stacks is changing. Matt Hadreas captured this shift:

“At the time, I was running an inside sales team...and I had really good data...but more often than those tools sped me up, which is what they were meant to do, they slowed me down.”

Matt emphasized how overwhelming tech stacks can hinder



efficiency, a sentiment driving a shift toward consolidation in RevOps.

Today's teams focus on streamlining their tools to ensure technology supports rather than complicates workflows. Simplifying tech stacks by centralizing data and integrating sales, marketing, and customer success platforms reduces complexity, allowing teams to collaborate more effectively and make faster, data-driven decisions.

This trend is accelerating as companies seek to reduce tech bloat and maximize the impact of their chosen tools. Matt's experience reinforces the need for thoughtful tech choices, ensuring that each tool in the stack delivers measurable value without adding unnecessary operational weight.

## The Changing Role of the RevOps Professional

As the field evolves, so does the role of the RevOps professional. Jen Igartua shared a prediction that I found particularly intriguing:

"I expect in the next ten years that all these VPs of RevOps will become CROs, and we'll have this wave of very technical and very operations-minded CROs."

This prediction underscores the growing strategic importance of RevOps. In the future, we're likely to see RevOps professionals managing systems and driving business strategy at the highest levels. This shift is already happening, with RevOps increasingly focusing on revenue optimization and [predictive analytics](#) to influence strategic decision-making.

# The Rise of Predictive Analytics

Several leaders I spoke with mentioned predictive analytics as a critical trend to watch, but it's essential to understand its potential and limitations.

Jeremy Donovan offered a nuanced perspective on this front:

"I think I can forecast revenue pretty well, but I wouldn't be able to forecast the future of revenue strategy and operations all that effectively beyond what all of us can see off the tip of our nose."

[Predictive analytics is revolutionizing RevOps](#) by allowing teams to foresee challenges and opportunities before they arise. AI-powered predictive models can analyze customer behavior, market trends, and historical data to offer insights that enable companies to allocate resources more effectively and craft proactive strategies.

Jeremy's comment highlights an important point: while predictive analytics can be powerful, it's not a crystal ball. It's most effective when applied to specific, quantifiable aspects of the business, like revenue forecasting.

However, predicting broader strategic shifts or operational changes remains challenging.

In a conversation with Sean Lane, we dug into predictive analytics and how it's being applied in practice:

"The way I think about it is across that entire customer journey; there are two foundational components that should always be there and never change. The first is the CRM [they] use - Salesforce, HubSpot - it doesn't matter. The second is some sort

of data warehouse, and you need to have a strategy for that.”

This insight underscores the importance of a solid data foundation for effective predictive analytics. It’s not just about having a sophisticated AI model; it’s about having clean, well-organized data to feed into that model.

However, when I brought up this topic with James Hunsberger, Senior Manager of Sales Systems at Miro, he cautioned that predictive analytics alone are not sufficient and emphasized the importance of domain expertise and collaborative learning:

“You have to have domain expertise, and we all have our pet tools that we grew up with... it starts almost moving towards a singularity of best practices and just good short development cycles.”

James underscores that while technology and predictive analytics can enhance operations, it is through human interaction and shared learning that organizations can develop the most effective practices. This point highlights that while predictive analytics can provide valuable insights, it’s not a substitute for human expertise and judgment. The most effective approach combines analytical insights with domain knowledge and experience.

By acknowledging the strengths of different tools and learning from one another, teams can converge towards a unified set of best practices, leading to more efficient development cycles.

Predictive analytics is becoming a crucial tool in RevOps, but more is needed. It’s most effective with solid data practices, domain expertise, and a clear understanding of its limitations. As companies refine their use of predictive analytics, we’re likely to see more nuanced and targeted applications that

complement, rather than replace, human decision-making in RevOps.

## The Continued Importance of Human Skills

Despite advances in AI and automation, human skills remain indispensable. Pete Kazanjy captured this sentiment perfectly:

“Sales has been hard for a long time. And the reason why sales is hard is because there’s scarce purchasing resources being sought after by sellers. This is why win rates are not 80% or 50%, but rather around 20% or 15%.”

Pete’s reminder highlights sales’ inherent difficulty and competitive nature, emphasizing that technology can assist. Still, the human element of perseverance and creativity will always be at the heart of success.

## Wrapping Up: Embracing the Future of RevOps

As I reflect on these conversations about the future of RevOps, a few themes emerge:

1. **AI and automation** will play an increasingly important role, but they are tools to augment human skills, not replace them.
2. **Data management and quality** will become even more critical as we rely heavily on AI and predictive analytics.
3. **Tech stack consolidation** will likely continue as companies prioritize integration and simplification over adding more tools.
4. **RevOps professionals** are poised to take on increasingly strategic organizational roles, potentially moving into C-suite positions.

5. The ability to **predict trends** and respond proactively will become a key differentiator for successful RevOps teams.

The future of RevOps is exciting, challenging, and full of potential. The field will continue to evolve rapidly, and those who can adapt and innovate will be well-positioned for success.

In our final chapter, we'll summarize everything we've learned and discuss how current and aspiring RevOps professionals can prepare for this exciting future.

## Chapter 6

# Preparing for the Future of RevOps



As we wrap up our journey through the world of RevOps, I can't help but feel excited about what's to come. My conversations with leaders in this space have been eye-opening, inspiring, and sometimes challenging. But most of all, they've left me with a clear sense that the future of RevOps is bright—if we're prepared to seize the opportunities it presents.

### Embracing Continuous Learning

A recurring theme in almost every conversation is the importance of continuous learning. The pace of change in RevOps is relentless, and staying on top of new trends and technologies is crucial.

Matt Volm perfectly captured this sentiment:

"It's one of those things I feel like I've seen people on LinkedIn and

some other platforms be like, oh, if you're in RevOps, you need to know Python, SQL, and all this other stuff. And if you do, great, yes, that will most certainly help you. Is it a requirement? No, I don't think so. ... Like anything else, the broader your skillset, the more things you have in your toolbox. But is that a requirement to be successful in the role? No."

What I love about Matt's perspective is that it's not just about acquiring technical skills. He emphasizes that RevOps's success comes from a broad skill set and adaptability.

Technical expertise, like knowing Python or SQL, is beneficial but not essential. Instead, the focus should be on continuous learning that works best for you. Matt also touches on the importance of understanding where technology is headed, particularly with the rise of AI:

"Just look at all the things now that people are doing with it [AI]; all the companies that have just spun up in that space. And the fact that it is literally seems to be the only thing that people can talk about, but you don't need any developing skills to be able to leverage a tool like that to do your job."

Matt reminds us that staying curious and adaptable to emerging technologies is key, but success in RevOps doesn't hinge solely on coding knowledge.

The need for reskilling and upskilling is particularly crucial in a world increasingly dominated by AI and automation. According to a recent report by DataCamp, [62% of leaders believe AI literacy](#) is now essential for their teams, and AI-driven roles are projected to increase over the next decade.

Investing in skills that complement technology will be vital to staying competitive.

## Balancing Technical and Soft Skills

While technical skills are essential, many leaders emphasize the continued importance of soft skills. Sean Lane shared an insight that resonated with me:

“The whole job is ambiguity. If you don’t like that, you’re not going to enjoy this type of job, you’re not going to enjoy this type of work. But if you embrace that and thrive in those situations, there’s no better gig to have.”

In a field that’s changing as rapidly as RevOps, navigating uncertainty, embracing ambiguity, and adapting quickly is just as important as any technical skill. [Experts in leadership development echo this](#), noting that as AI reshapes industries, skills like problem-solving, emotional intelligence, and adaptability will become even more vital.

## The Power of Cross-Functional Understanding

As RevOps continues to evolve into a more strategic role, understanding how different parts of the business interact becomes increasingly essential. Jen Igartua highlighted the critical role of RevOps in uniting various teams:

“I got very obsessed with the idea of I needed to unify these teams... we were breaking down tech silos and data silos and eventually people silos.”

Jen’s focus on breaking down silos emphasizes the importance of connecting teams across sales, marketing, and customer success to drive seamless operations. She explains how these



functions are often misaligned despite their common goals:

“Why is it that they’re so misaligned when it’s so obvious that they’re actually on the same page? We should be mad at finance; they’re the ones not giving us budget. Why are we mad at each other?”

This highlights a recurring issue in many companies—teams working in isolation and unintentionally hindering one another. Jen’s experience points to the need for RevOps professionals to bridge these gaps, ensuring that teams are aligned and working together rather than in conflict.

Beyond aligning teams, RevOps is crucial in improving processes that connect different departments. Jen emphasizes the importance of proper handoffs between marketing and sales, which is often where alignment breaks down:

“It’s crazy that we have these super high expectations, but we’re giving people basically the bare minimum... Instead of just stamping a lead with ‘MQL,’ why aren’t we providing more context, like, ‘Hey, this company just did some funding,’ or ‘Their CEO is engaged in the platform,’ or ‘They visited these key product pages’? That kind of insight is invaluable for sales.”

By providing this deeper level of information, RevOps can ensure that sales teams have the right insights to have meaningful conversations with prospects and customers. This approach leads to better outcomes across the entire customer journey, from marketing engagement to post-sale success.

Ultimately, Jen’s approach to breaking down silos and fostering collaboration highlights the strategic importance of RevOps in modern organizations. Connecting the dots between sales,

marketing, and customer success is essential for driving seamless operations and better customer outcomes. According to recent research, companies that emphasize cross-functional collaboration are [significantly more likely to achieve revenue growth](#).

By unifying data, technology, and people, RevOps professionals can create smoother workflows, improve customer experiences, and drive long-term revenue growth. As Jen says, the goal is clear: “Unify the business stack.”

## Leveraging Data & AI Responsibly

As discussed throughout this book, data and AI are set to play an increasingly important role in RevOps. But with great power comes great responsibility.

Jeff Ignacio provided an insightful take on how AI is shaping the future of RevOps:

“The first time I ever learned how to automate something was reading ‘Automate the Boring Stuff,’ a Python book, and I learned how to use automation to quickly shave time off my day. Also, leverage the AI tools that are out there... they’re pretty powerful to help you become a 4x or 5x operator.”

Jeff’s experience highlights the transformative potential of AI and automation in RevOps, particularly for efficiency and productivity. He encourages professionals to embrace AI tools to amplify their capabilities.

However, he also emphasizes the importance of learning the foundational skills first, as AI is most effective when paired with a solid understanding of the processes it’s optimizing.

AI is already proving transformative in areas like predictive analytics, but as Jeff suggests, [the key to leveraging these tools is learning how to use them responsibly](#). As more companies adopt AI to streamline operations, ensuring data integrity remains critical.

Jeff warns that while AI can significantly enhance efficiency, it requires a thoughtful approach:

“If you’re thinking at the SQL data warehousing, data visualization layer... one thing that I’m doing is I write the query myself... and then I go into ChatGPT, and it shows me a new tip, a way of becoming more productive.”

This underscores the importance of pairing AI with human oversight to avoid errors and maintain control over the output. While AI can accelerate workflows, RevOps professionals must critically assess the results and ensure they meet business standards.

As AI becomes more embedded into RevOps processes, companies must remain vigilant about ethical considerations and data governance. The rapid advancement of AI requires RevOps teams to balance automation with responsibility, ensuring that the tools enhance decision-making without compromising accuracy or ethical standards.

By doing so, RevOps professionals can harness the power of AI responsibly, driving productivity while maintaining data quality and integrity.

## Staying Agile in the Face of Change

If there's one constant in RevOps, it's change. The ability to stay agile and adapt quickly to new challenges is crucial. Brian Tully shared a perspective that captures this perfectly:

"We had to make those changes too while we're doing this, and that actually compounds it because then you have, okay, I knew how to sell when it was three phone calls of support... now you're telling me there might be a project manager, and there might be a month and a half of stuff that we're going to do instead of a week."

Brian's emphasis on agility and responsiveness highlights the challenges of pivoting strategies and adapting to new customer needs. He discusses how, even with the best data and insights, the real test comes when teams must quickly adjust to new ways of operating. His experience shows that staying flexible and adapting to more complex sales and customer success processes is critical for thriving in a rapidly changing environment.

He further emphasizes the importance of being agile and responsive, not only in adjusting the sales strategy but also in enabling teams to deal with complexity:

"The constant enablement material cycle through to enable the sales reps and to enable the SDRs is essential... so that the client doesn't go, 'I was promised this,' and then they go over the wall and we're like, 'What the heck are you doing?'"

This reinforces the idea that agility isn't just about reacting to external market changes; it's about preparing teams internally to handle evolving processes and ensure customer success. With

AI and automation driving industry shifts, RevOps teams must stay nimble, keeping both strategy and execution aligned for success.

## Building Your Network

Finally, I can't stress enough the importance of building a solid professional network. The RevOps community is incredibly supportive and always willing to share knowledge and experiences. Matt Volm CEO of one of the most active Revenue Operations communities - RevOps Coop - explains it well:

"We have about 12,000 members from all across the globe. A majority of folks do work in rev ops, but all you really need to be in the community is a passion for revenue operations, regardless of job title."

Matt's openness to sharing and learning from others is an excellent example of the collaborative spirit that makes the RevOps community so unique. Research shows that professional networking remains one of the top factors for career growth, with studies showing that it results in up to [85% of jobs being filled](#). This is particularly true in specialized fields like RevOps.

## Chapter 7

# The Future Awaits: Unlocking RevOps Potential

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The future of RevOps is bright, expanding, and evolving in incredible ways.

And it's happening right now.

As you continue in your RevOps journey, think of the current market challenges as signals of opportunity. The industry's evolution is accelerating, creating niche specialties like GTM Ops, Commercial Ops, and more, but the need for RevOps core competencies—cross-functional insight, real-time adaptability, and tech fluency—remains both high-demand and in short supply.

To thrive, here's what will set you apart:

- **Cultivate Agility to Unlock Strategic Impact:** The ability to pivot is no longer optional; it's the foundation of future-ready RevOps. When you stay agile, you position yourself and your organization to adapt quickly, strategically, and profitably.
- **Embrace Change to Drive Collaboration:** Cross-functional knowledge and integrated operations are essential in a fast-moving market. By fostering internal partnerships and customer-centric operations, you not only enhance your strategic value but also strengthen your company's resilience.
- **Harness AI with Precision and Purpose:** Approaching AI with a blend of enthusiasm and strategic application will allow you to transform data into actionable insights, fueling decisions that keep you a step ahead.
- **Build a Dynamic Network to Fuel Innovation:** The connections you forge today will be tomorrow's pathways to new knowledge, solutions, and growth. Engage with others who prioritize adaptability, and let these alliances help drive RevOps forward.

If you're ready to take these next steps, join us on the **RevAmp podcast**—a space where thought leaders, innovators, and RevOps practitioners come together to share their stories and strategies. Whether you're looking to learn from others, gain actionable insights, or connect with the broader RevOps community, the conversations happening there are designed to inspire and empower your journey.

In RevOps, the most valuable assets are vision and adaptability. You're not just responding to change; you're actively defining what comes next. While other operational roles emerge, a strategic and agile RevOps professional will lead the way.

Your future impact isn't just about managing revenue—it's about setting the pace for business itself.

## Meet the Podcast Guests

Jeremey Donovan, Executive Vice President of RevOps and Strategy at Insight Partners.

James Eaton, Senior GTM Advisor and former Vice President of Sales at Dozuki.

Nick Gollop, Senior Revenue Operations Advisor & Mentor | Founder at RevOps On-Demand.

Chirag Gulati, CEO and Chief Architect at RevSolutions.

Matt Hadreas, Director of Revenue Operations at Support Logic.

James Hunsberger, Senior Manager of Sales Systems at Miro

Jen Igartua, CEO of Go Nimbly.

Jeff Ignacio, Head of GTM Operations at Keystone AI.

Pete Kazanjy, co-founder of Atrium and founder of the Modern Sales Pros community .

Sean Lane, a founding partner at BeaconGTM Consulting and former Operations Leader at Drift.

Shantanu Shekhar, Head of Revenue Operations at Personio and former Sr. Director, GTM Operations at Gong.

Brian Tully, Senior Vice President of Sales at LiveU.

Matt Volm, founder of RevOps Co-op.

Amie Weizer, Director of Global RevOps at Zensai.

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# REVOPS REWIRED

## Rethinking Revenue for the Digital Age

When the pandemic upended life as we knew it, businesses faced a seismic shift that continues to reverberate today. Remote work, digital acceleration, and economic uncertainty reshaped how we connect with customers, grow revenue, and adapt to change.

RevOps Rewired: Rethinking Revenue for the Digital Age is your roadmap to thriving in this transformed landscape. Drawing from conversations with over 40 top revenue leaders from companies like Gong and Miro, Mark Lerner distills actionable insights and proven strategies to navigate disruption, embrace technology like AI, and build agile, data-driven operations.

Whether you're a RevOps professional, sales leader, or executive, this book will equip you to adapt, grow smarter, and lead confidently in the digital age. Discover how to turn change into opportunity and position your team for lasting success.



**Mark Lerner**  
RevOps Community  
Leader