



# The State of RevOps

# 2025

200 RevOps professionals weigh in on tech adoption, process efficiencies, priorities, barriers, and opportunities





## INTRODUCTION

# A Slice of the RevOps Landscape

As we venture into 2025, the landscape of Revenue Operations (RevOps) is evolving rapidly, reflecting an increasing recognition of its role in accelerating growth, improving revenue, and enhancing the customer experience. At a time when businesses are striving for greater alignment between departments, RevOps plays a pivotal role in bridging gaps and ensuring a cohesive approach to revenue generation. As companies increasingly formalize their RevOps functions, an opportunity is emerging for them to unlock the full potential of these new departments—and for RevOps to evolve and prove the value it can deliver.

This report aims to capture the current state of RevOps within organizations, illuminating the trends, challenges, and opportunities that professionals are navigating. As we gear up for the upcoming year, there's a palpable feeling of optimism among RevOps professionals: They're keen to explore innovative approaches and technologies to optimize their operations. Yet challenges persist—particularly in the areas of process efficiency, success metrics, and the effective implementation of new tools.

We hope the following insights, along with our suggestions and best practices, serve you well. Thank you to those of you who contributed your perspectives to this larger RevOps story. Our ultimate hope is that you feel empowered to meet whatever 2025 will bring with curiosity, confidence, and even joy—along with a sense that you've got someone in your corner. (That someone's us.)

---

## CONTENTS

<b>Introduction: A Slice of the RevOps Landscape</b> .....	<b>2</b>
<b>Key Takeaways</b> .....	<b>3</b>
<b>Survey Demographics</b> .....	<b>4</b>
<b>RevOps' Adoption &amp; Perceived Value</b> .....	<b>6</b>
<b>Revenue Growth Confidence &amp; Tech Budget</b> .....	<b>13</b>
<b>Tech Stack Utilization</b> .....	<b>17</b>
<b>AI Adoption &amp; Confidence</b> .....	<b>28</b>
<b>Process Documentation &amp; Manual Processes</b> .....	<b>36</b>
<b>Priorities &amp; Alignment</b> .....	<b>49</b>
<b>About Rattle</b> .....	<b>55</b>

# Key Takeaways

## RevOps Grows Up

79% have a formal RevOps function going into 2025, and the fact that nearly ⅔ of smaller companies have formalized RevOps underscores the function's broad appeal.

## Track it to Prove It

Even the most commonly tracked RevOps metric—revenue growth impact—is monitored by fewer than 60% of organizations. (Want your org to recognize the value of your contributions? Start tracking more metrics!)

Still, 65% believe RevOps has been perceived as more valuable within the organization in 2024 compared to previous years.

## Revenue Outlook is Bright

More than 80% say they're feeling better about revenue attainment this year than they were last year. (Only 53% were so optimistic last year!)

## Gearing Up for Budget Growth

84% of respondents expect their tech budgets to either hold steady or increase in 2025.

## Tech Stack Efficiency Gaps

There's plenty of room for RevOps to extract greater value from their tech stacks: 45% report having underused tools.

## Larger Firms Lag in AI

67% have implemented AI tools in their RevOps or SalesOps processes—and the larger the company, the less likely it is to have invested in AI tools by now.

## Logistical Barriers to AI Adoption

Bandwidth constraints and budget constraints are the top two reasons organizations aren't using AI yet.

## Expecting AI to Deliver

Yet 86% have medium-to-high confidence in the imminent value of AI to their RevOps departments.

## Sales Data Confidence Gap

Just 26% of respondents have full confidence in the opportunity data provided by their Sales reps.

## The Heavy Price of Process Gaps

99% of RevOps agree that precious dollars are lost due to process issues. Nearly ¾ of you say you're missing out on more than 10% of revenue due to process gaps, and ¼ of you are missing out on more than 20% of revenue due to process gaps.

## Alignment Challenges

47% report that RevOps and Sales leaders are only somewhat aligned or not aligned at all. (That's a considerable share of teams for whom improved coordination could enhance overall performance!)

## Unified Focus on Sales Process

Both Sales leaders and RevOps rank sales process improvements as their top priority for 2025.

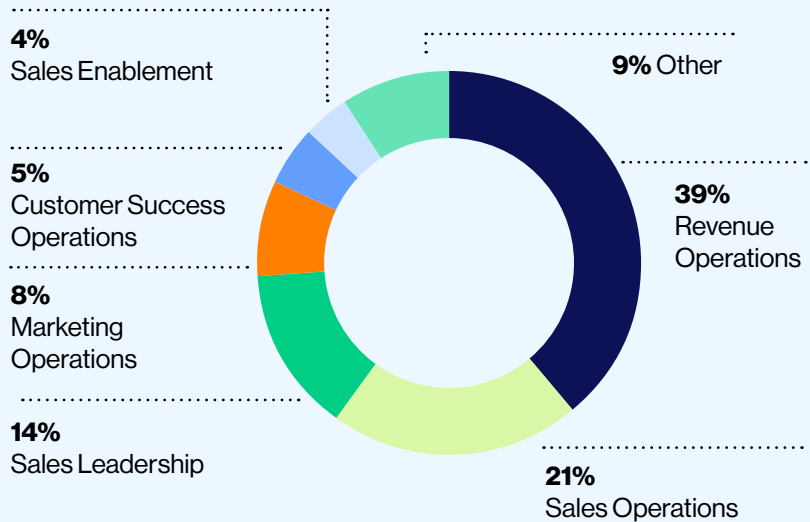


WHO WE HEARD FROM

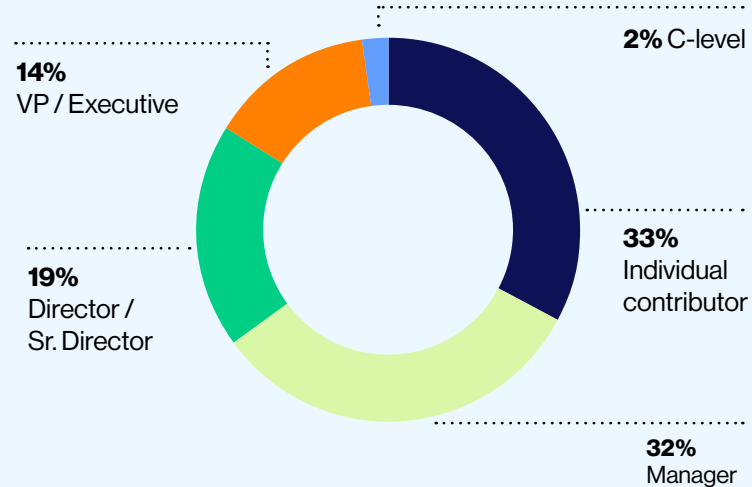
# Survey Demographics

The survey includes 199 participants, ranging from large enterprises like Atlassian and Twilio to smaller organizations of fewer than 100 employees. Companies span both tech and non-tech sectors, B2B and B2C markets. All respondents live and work in the United States; one-third (67%) of them are manager-level or above.

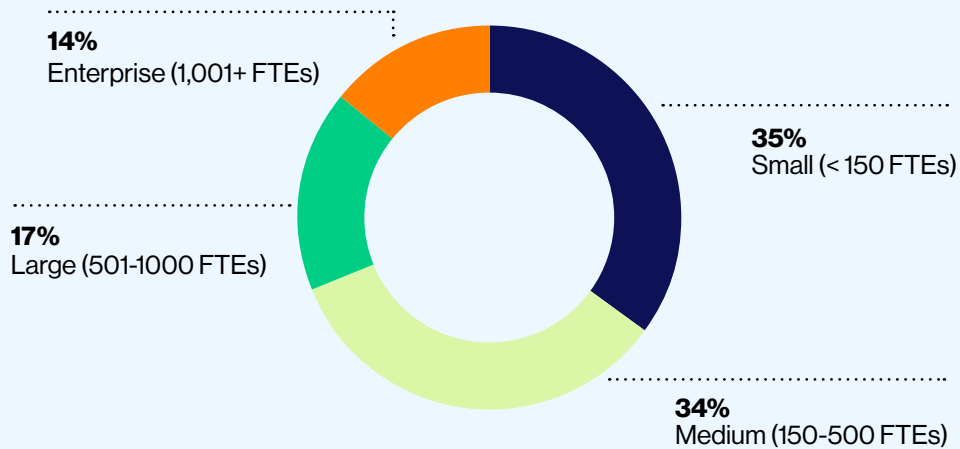
RESPONDENTS BY DEPARTMENT



RESPONDENTS BY LEVEL



RESPONDENTS BY COMPANY SIZE



\* "Other" included CEO, General Operations, Business Operations, Marketing Leadership, Sales ICs, and roles that covered multiple departments, e.g., Head of Marketing & RevOps



# RevOps' Adoption & Perceived Value

RevOps has quickly evolved into a critical element of companies' growth strategies, and the majority of respondents believe their role is perceived as valuable... but teams need to track more metrics to better quantify their impact on the organization.

**There's a clear relationship between the scale of a business and the presence of a dedicated RevOps team — but the fact that nearly 2/3 of smaller companies have formalized RevOps underscores the function's broad appeal. You'll remember that RevOps roles on LinkedIn increased by 300% in 2021; by 2023, RevOps had become the fastest-growing job in the United States.**

---

Gartner predicted that 75% of the highest-growth companies in the world would be deploying a RevOps model by 2025

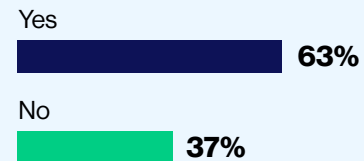
---

Indeed, Gartner predicted that 75% of the highest-growth companies in the world would be deploying a RevOps model by 2025. The great news? Y'all are ahead of the game: 79% of respondents have a formal RevOps function going into 2025.

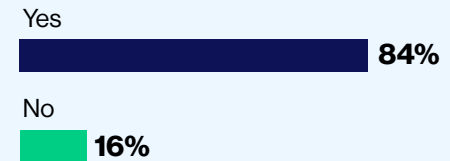
Collectively, the data shows that RevOps has swiftly evolved into a critical element of companies' growth strategies as they seek to streamline processes and improve alignment across revenue-generating departments.

### Does your organization have a formal RevOps team in place?

#### SMALL



#### MEDIUM



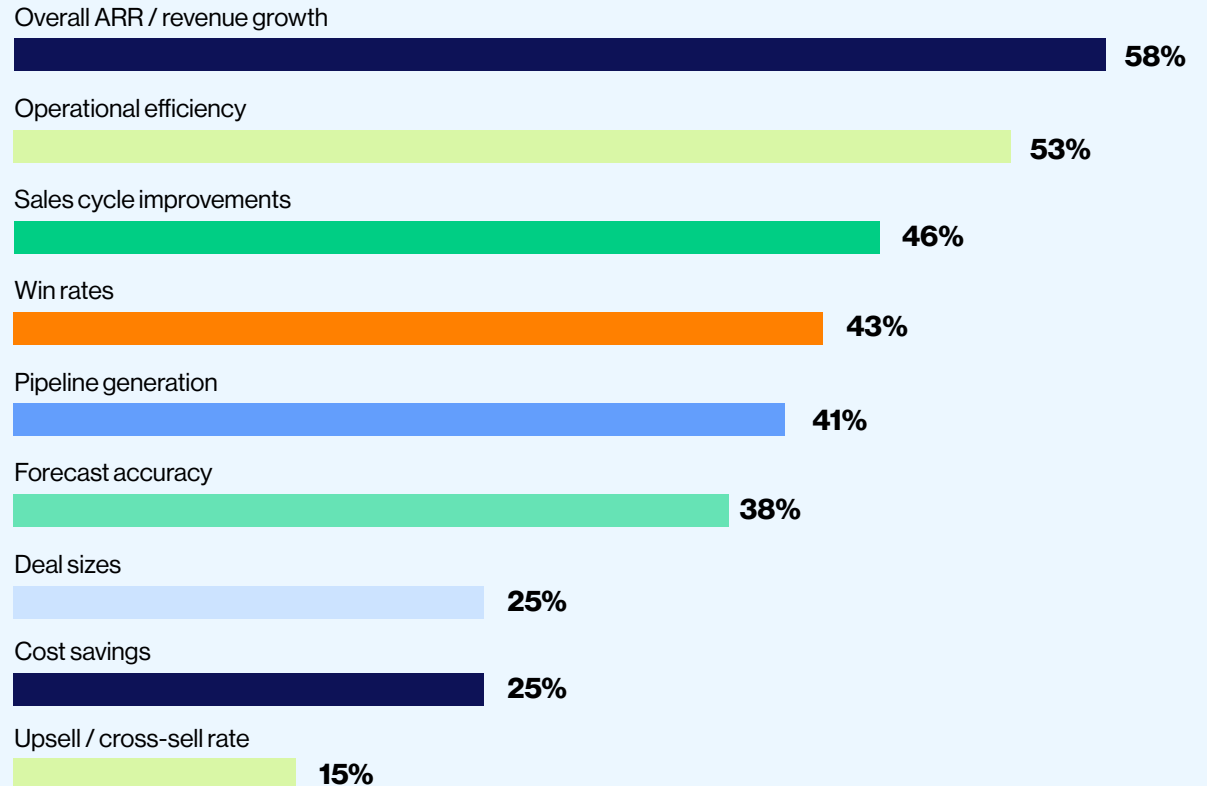
#### LARGE AND ENT



Our biggest takeaway from this set of data is the old adage: You can't improve what you don't measure. Remarkably, even the most commonly-tracked RevOps metric—revenue growth impact—is monitored by fewer than 60% of organizations. RevOps professionals: Want your organization to recognize the value of your contributions? However you can, start tracking more of these metrics. Your goal is to optimize processes, align departments, and drive revenue. Prove that you're doing it!

Which brings us to...

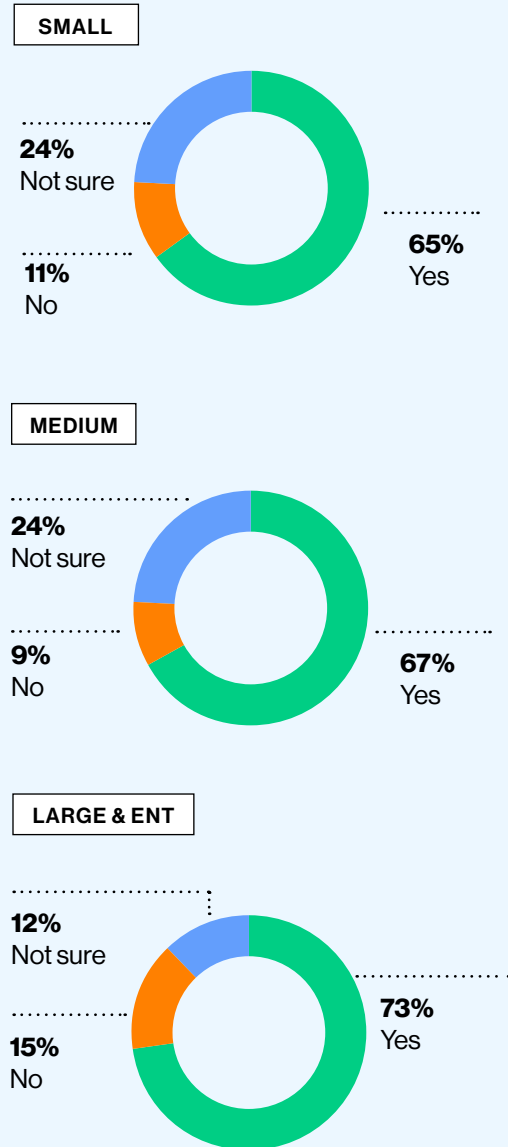
### What metrics are used to measure RevOps' impact on the organization?



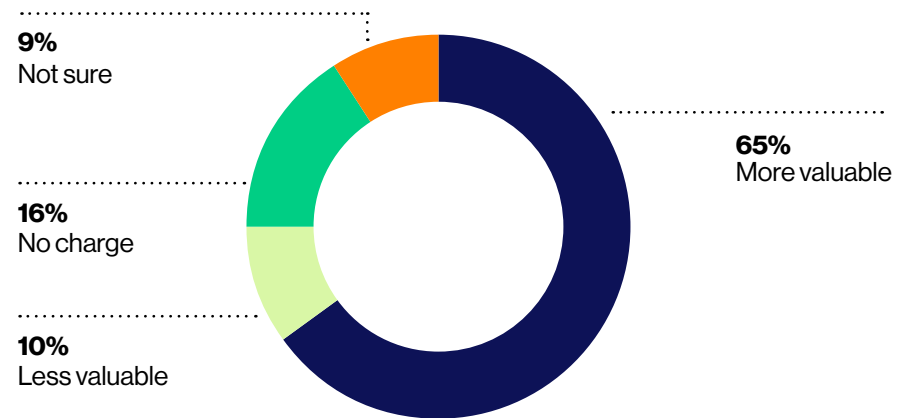




### Does your organization view RevOps as a pivotal role in the organization?



### In your opinion, how has RevOps been perceived within your organization in 2024 compared to previous years?



The impact of the RevOps function becomes more obvious as organizations grow in size. While we'd love some more emphatic "yeses" here when it comes to the value RevOps delivers, the data looks more promising than last year, when 63% of RevOps respondents felt their role wasn't seen as directly influencing revenue growth.

What surprised us most is more than 20% of respondents said they weren't sure whether their organizations perceived them as pivotal. But here's what we know (and what we know *you* know): Companies with RevOps teams report 19% faster revenue growth and 15% higher profitability than those without. Those numbers are from Forrester, which also reported that public companies with RevOps functions saw a 71% higher stock performance than those without them in 2019.

Our point? There's a direct correlation between a company's profitability and the existence of a RevOps function. If RevOps professionals currently aren't experiencing internal visibility and appreciation for their roles, they might engage in some of the following (we'd like to see more respondents certain their organizations know their value next year!):

---

There's a direct correlation between a company's profitability and the existence of a RevOps function

---



1 MONTH TO  
**25 mins**  
TIME TO ROLL  
OUT A PROCESS

8 HOURS TO  
**13 mins**  
AVERAGE TIME  
PER APPROVAL

“Our team moves incredibly fast. I didn't want to interrupt that, but we needed more standardization. The extra time Rattle gives us is the difference between a good fiscal year and a bad one. If it hadn't been for Rattle, it would have taken us another month before we were able to sell anything.”

**Eric Filowitz**  
Senior Director of RevOps & Enablement



## Steps to strengthen awareness of what RevOps brings to the organization

**Demonstrate measurable impact.** RevOps can showcase KPIs that align with company goals, such as improved revenue growth, enhanced sales efficiency, or reduced customer churn. Sharing dashboards or regular performance reports that highlight these improvements can garner leadership attention.

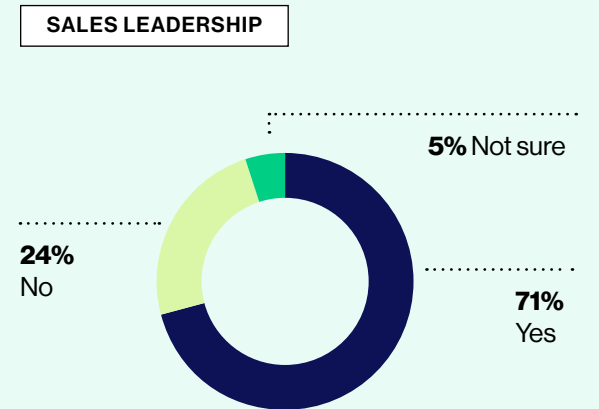
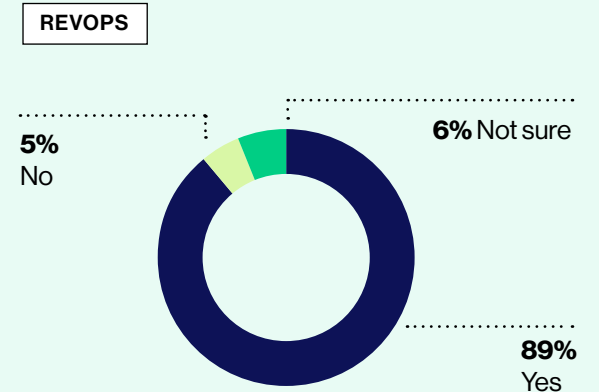
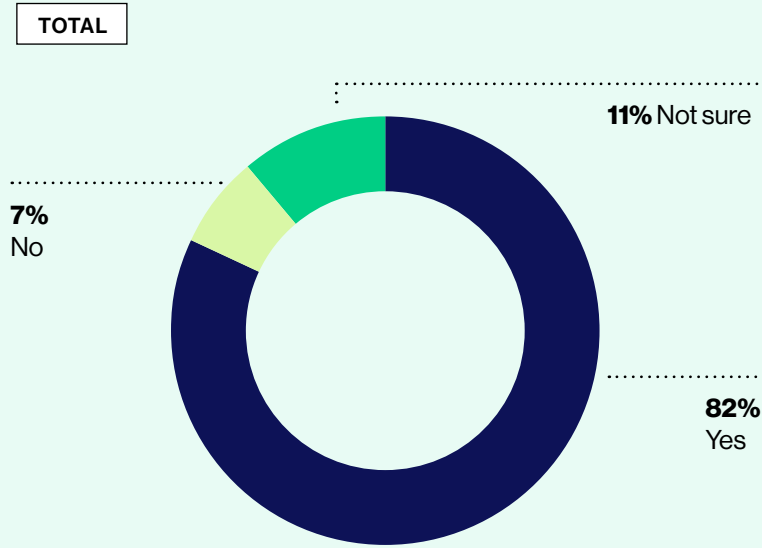
**Engage in more cross-departmental collaboration.** By actively working with Sales, Marketing, and Customer Success teams to streamline processes and solve pain points, RevOps can position itself as a key enabler of these departments' successes. Host cross-departmental meetings or working groups to identify and resolve bottlenecks, and strengthen your organizational presence.

**Get executive sponsorship.** Securing a champion at the executive level, such as the Chief Revenue Officer (CRO) or Chief Operating Officer (COO), can help elevate the function within the organization. Frequently communicate with executives about RevOps initiatives and progress to highlight your alignment with company-wide initiatives. (In other words, get a seat at the table if you don't already have one! You should be at all strategic meetings where revenue, forecasting, and growth are discussed.)

**Launch internal awareness campaigns.** RevOps teams can build internal awareness through newsletters, presentations, or workshops that explain how their work benefits the company's growth and operations. Showcasing successful case studies internally can further highlight your team's contributions.

**Adopt AI and automation.** Implementing new technologies that directly improve internal processes will highlight the efficiency and strategic value RevOps brings. Demonstrating successful tech-driven results will capture attention from leadership and peers alike.

**Do you feel that RevOps' growing importance in the industry has positively impacted your career prospects?**



Compared to last year, respondents are 20% more likely to see RevOps' growing importance as positively impacting their career prospects this year: Only 62% said "yes" to this question in 2023.

Still, we feel the discrepancy between internal appreciation and external prospects: While only 68% of you feel your organization recognizes the importance of your role, 82% of you feel the rising excitement around RevOps in the industry has led to better opportunities *outside* your organization.

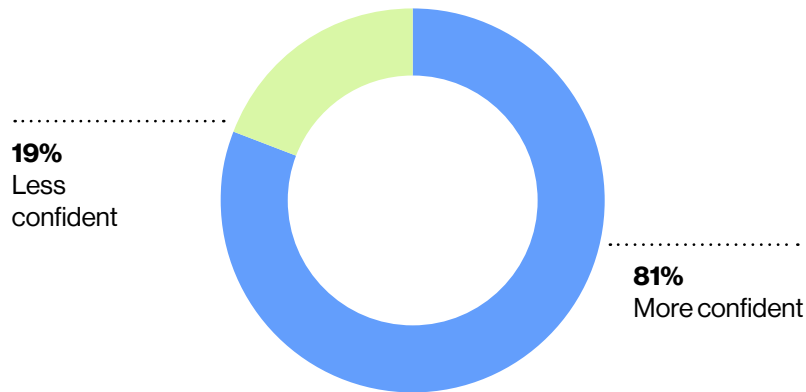
It might seem a bit contradictory, but this is likely a consequence of RevOps' nascency. While there's a growing excitement about the role, it hasn't yet fully permeated organizations' cultures, and that's something you can feel firsthand from within. The line you'll need to walk now: advocate for your contributions within your organization, but capitalize on opportunities elsewhere. As the field matures, these dynamics will foster a deeper appreciation for RevOps.



# Revenue Growth Confidence & Tech Budget

A significant majority are feeling better about revenue attainment this year than they were last year, and 84% expect their tech budgets to either hold steady or increase in 2025. That's a notable YoY increase when it comes to new tool adoption for RevOps—in fact, it's a 400% increase from 2023.

**Compared to how you felt entering 2024, how confident are you in your company's revenue attainment/growth prospects for 2025?**



More than 80% of respondents say they're feeling better about revenue attainment this year than they were last year. (That number was only 53% last year!) And in case you're wondering, the numbers didn't vary much by company size: Businesses across the board are equally optimistic about 2025. Enough said? (We think so.)



65% TO  
**95%**  
FILL RATE OF  
RISK NOTES

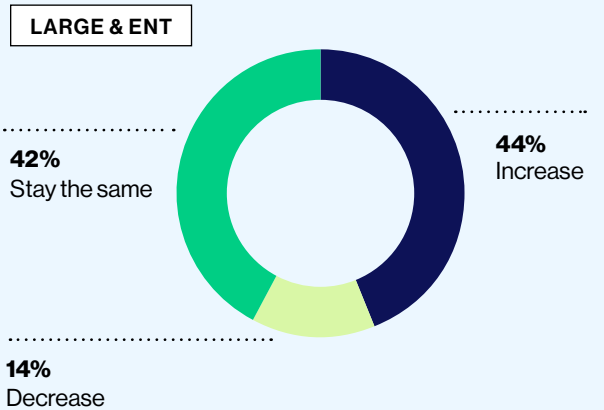
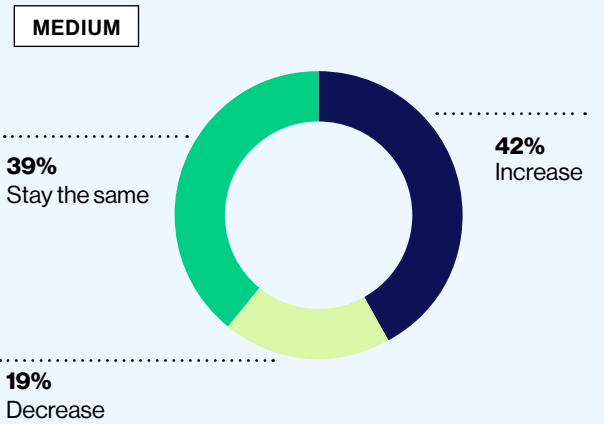
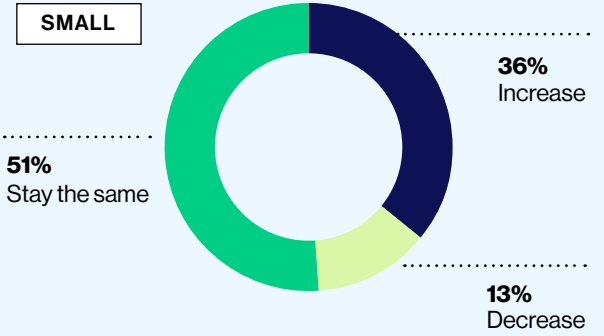
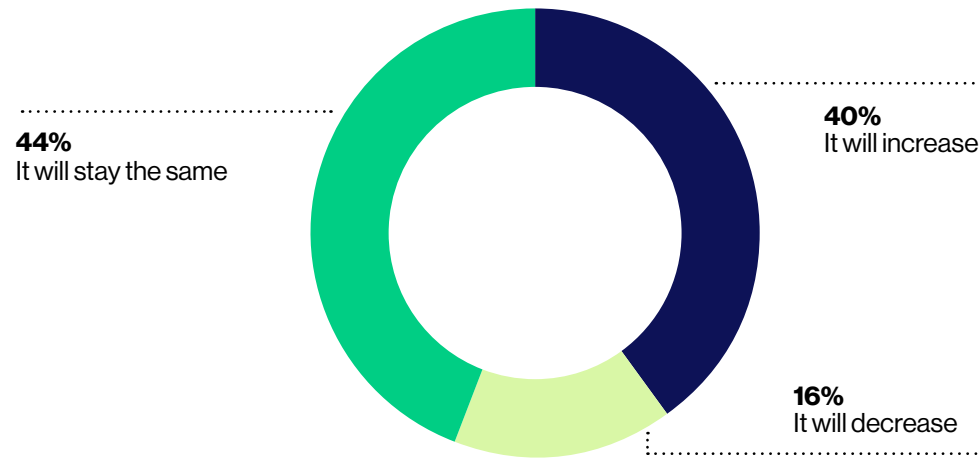
**\$500K+**  
SALARY SAVED

“We used to see forecast slips at the last mile because we weren't solving for risk in a programmatic way. Being able to derive these insights early and often has, without a doubt, helped us mitigate lost revenue. Rattle has solved that forefront of moving deals along the way we expect.”

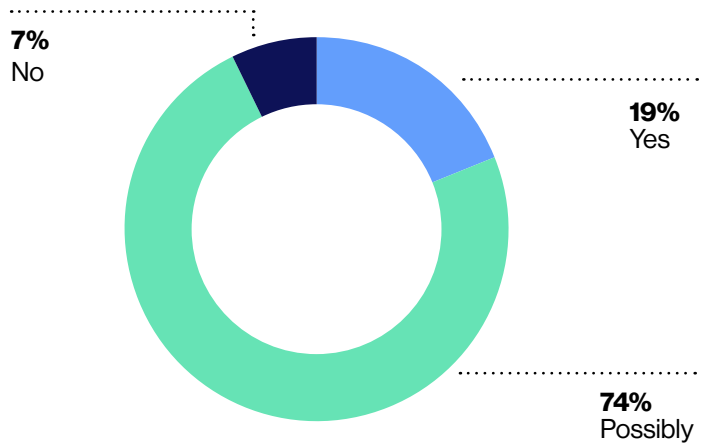
**Trevor Greyson**  
Head of Business Technology



### Compared to 2024, how will your technology budget change in 2025?

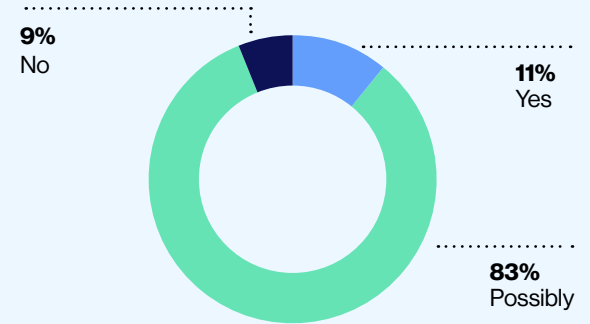


**Do you expect your revenue team will add new tools to its tech stack in 2025?**

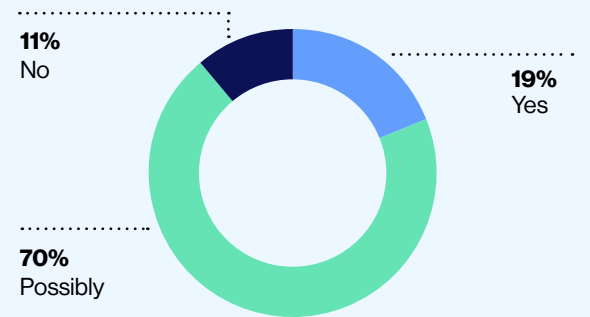


84% of respondents expect their tech budgets to either hold steady or increase in 2025. And while the majority of respondents say they'll "possibly" use that budget to onboard more tools this year, it's worth noting the significant YoY increase in new tool adoption: In 2023, only 4% of respondents said they'd be adding new tools; in 2024, 9% said they'd be adding new tools; and this year, nearly 20% of respondents say they'll be adding new tools to their RevOps tech stacks. (Put simply, your competitors are aiming for a competitive advantage, so stay sharp!)

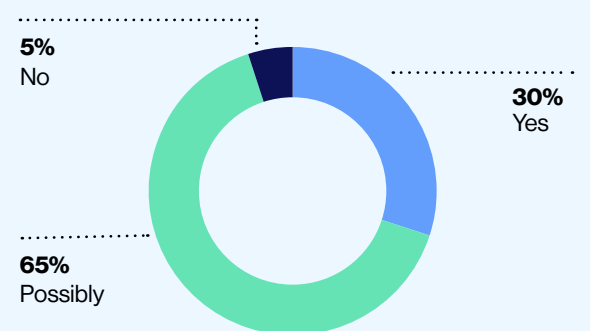
**SMALL**



**MEDIUM**



**LARGE & ENT**



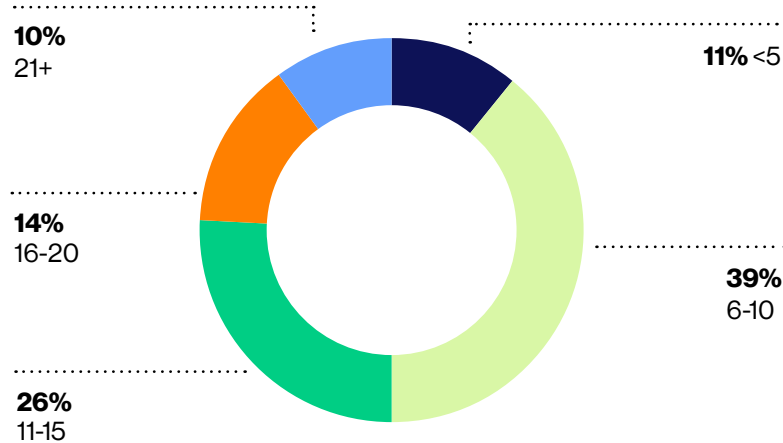




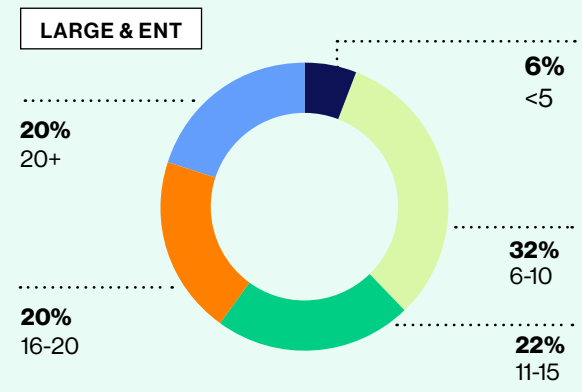
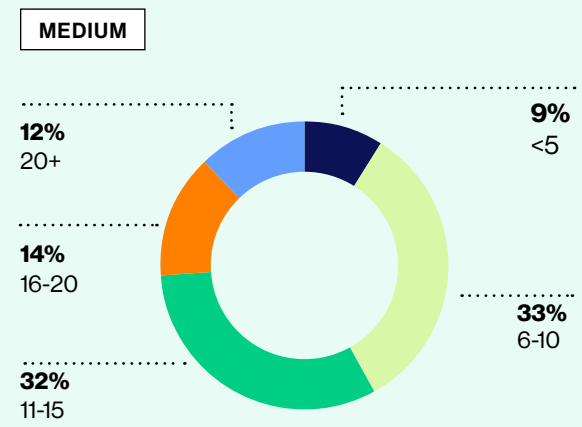
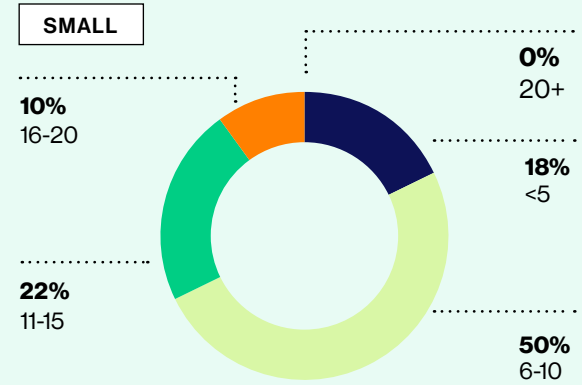
# Tech Stack Utilization

There's plenty of potential for RevOps to extract greater value from their tech stacks: 45% of respondents report having underused tools, and only 5% conduct monthly tech stack reviews. RevOps must track tool adoption, and up their game on training and enablement resources.

### Approximately how many tools are in your revenue tech stack?

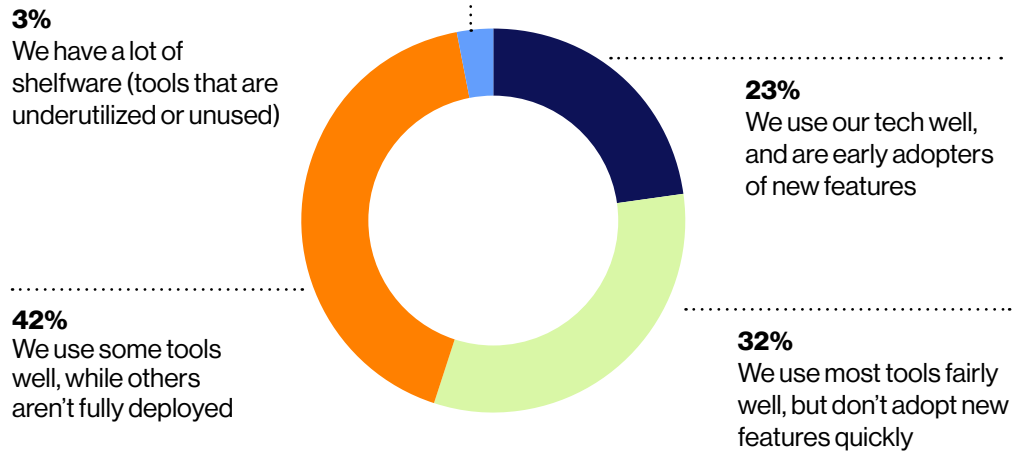


*Exactly no one* is surprised to see a direct correlation between company size and the number of tools in RevOps' tech stacks. Most small companies (68%) utilize fewer than 11 tools in their stacks; 18% use fewer than 5. On the other hand, 40% of enterprises use more than 16 tools; 20% exceed 20 tools. These organizations must leverage a more extensive range of technologies to manage their more complex workflows and operations.

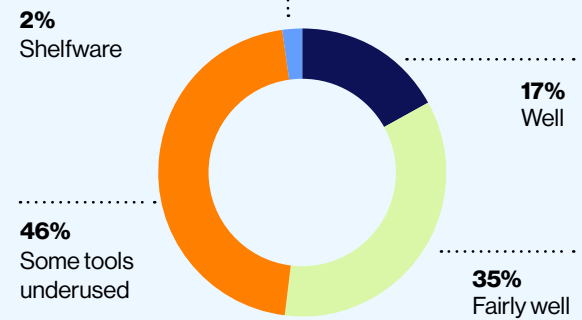




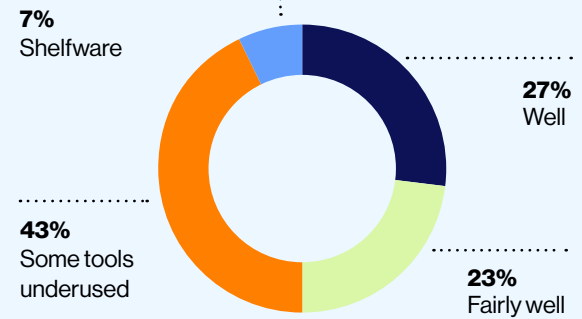
### How well-utilized is your company's tech stack?



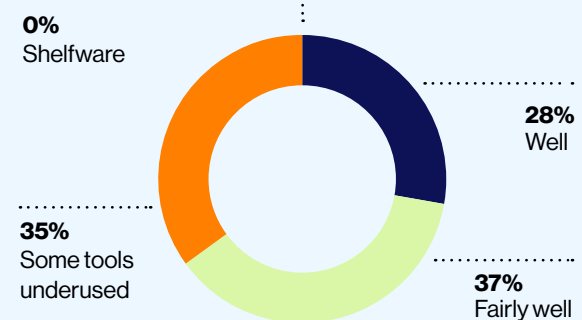
#### SMALL



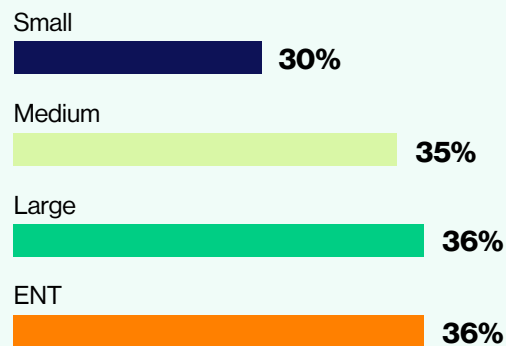
#### MEDIUM



#### LARGE & ENT



**How much of your tech stack would you consider “shelfware” (i.e., underutilized or unused tools)?**



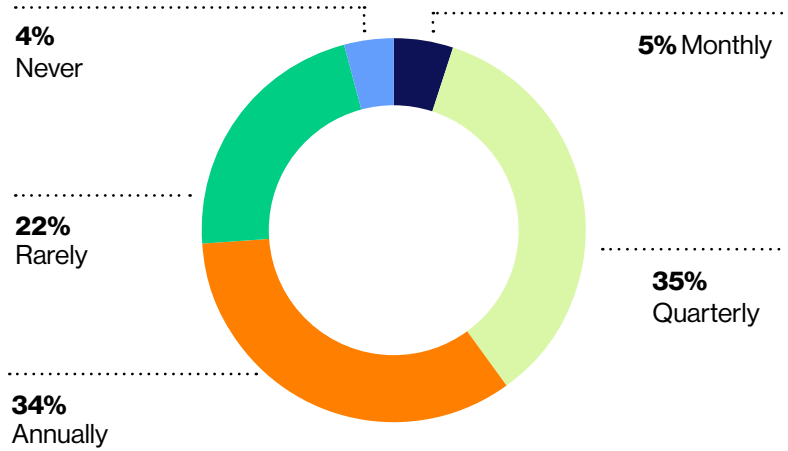
The main takeaway is that there’s plenty of potential for RevOps to extract greater value from their tech stacks. Half of medium-sized companies (50%) and *nearly* half of small companies (48%) report having underused tools, highlighting inefficiencies in how tech stacks are being deployed. Medium-sized companies report the highest percentage of shelfware, reflecting a challenge in scaling tech stacks effectively as they grow. 65% of large and enterprise companies believe they use their tech stacks “well” to “fairly well”—yet few organizations are maximizing their tools’ potential. (Indeed, when the question was posed differently, respondents across the board said an entire third (33%) of their tech stacks are shelfware.)

---

The main takeaway is that there’s plenty of potential for RevOps to extract greater value from their tech stacks.

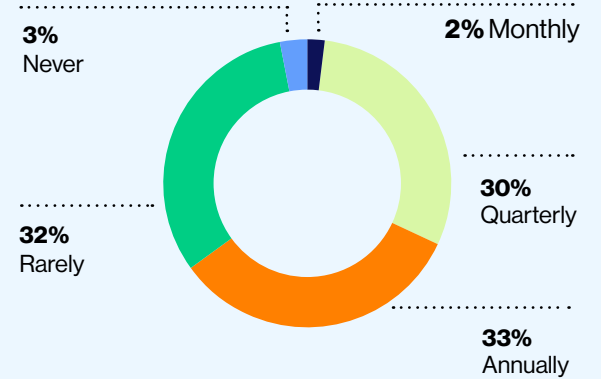
---

### How frequently do you review the effectiveness or ROI of your tech stack?

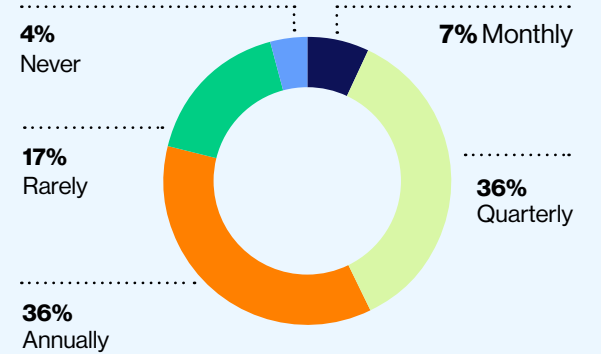


Only 5% of respondents conduct monthly tech stack reviews, suggesting that continuous assessment practices aren't widely adopted. With 22% of organizations rarely reviewing and 4% never doing so, there's a risk of stagnation and missed opportunities to optimize for improved efficiency and ROI. RevOps teams should ideally review the ROI of their tech stacks on a monthly or quarterly basis to ensure maximum value, agile decision-making, and alignment with business goals.

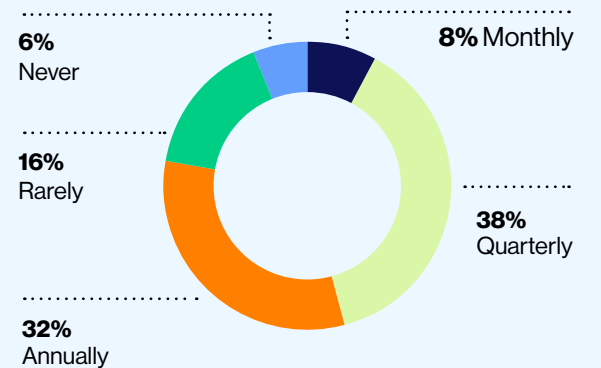
#### SMALL

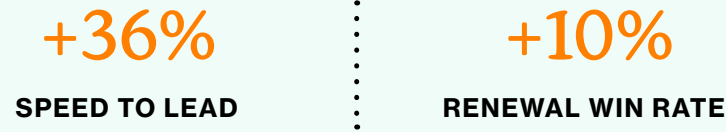


#### MEDIUM



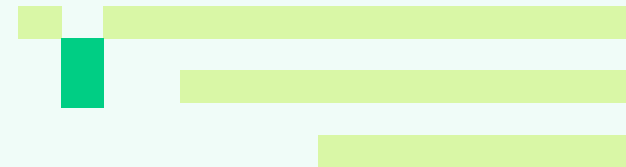
#### LARGE & ENT





“Without Rattle, you are dependent on each person: ‘Look at this report, this dashboard.’ How do you reinforce that?... The result with Rattle is a 36% faster Speed to Lead and Intercom hitting their SLA for the first time ever.”

**Karen Lau**  
Sales Operations Manager



## Steps to strengthen awareness of what RevOps brings to the organization

**Regularly audit your tech stack.** Conduct routine assessments of all the tools in your stack to ensure they're being fully utilized in alignment with business objectives. Remove or replace underused tools, and identify gaps where new tools could add value.

**Standardize tool usage across departments.** Ensure consistent use of tools across Sales, Marketing, and Customer Success. Align processes to ensure teams are using the tools in a way that supports seamless data flow and collaboration.

**Invest in training and enablement.** Provide continuous training for all team members on how to use the tools effectively.

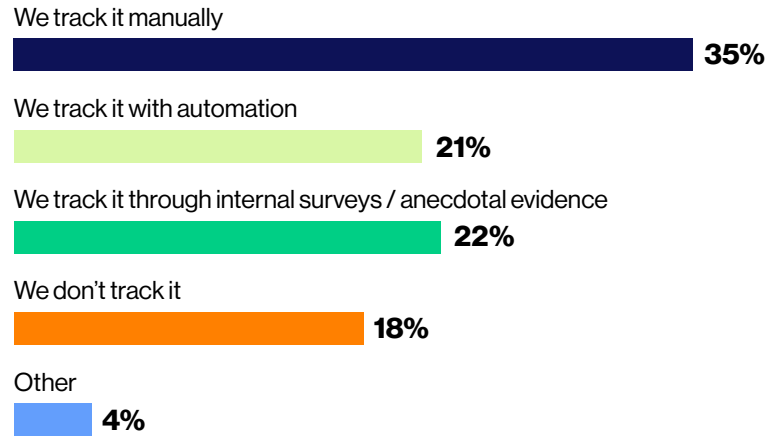
**Stay current with feature releases.** Continuously monitor the latest developments and newest features of your existing tools to realize the full value of these advancements.

**Integrate tools to eliminate silos.** Ensure all the tools in your stack are integrated to prevent data silos and manual processes. By connecting your CRM, sales enablement platform, marketing automation platform, CMS, and analytics tools, you can achieve a unified view of Revenue Operations.

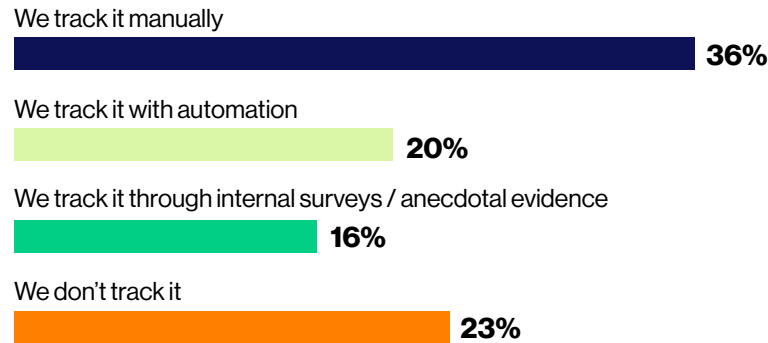
**Focus on data quality and governance.** Maintain high data quality standards by regularly cleaning, updating, and organizing data across all tools. This enables better decision-making and increases the value of insights gained from your tech stack.

**Monitor and measure performance.** Use key metrics to monitor how each tool contributes to business outcomes, such as efficiency improvements, revenue growth, or deal velocity. Set clear KPIs for tool performance and ROI, and track their impact over time. Adjust your stack as necessary to maximize value.

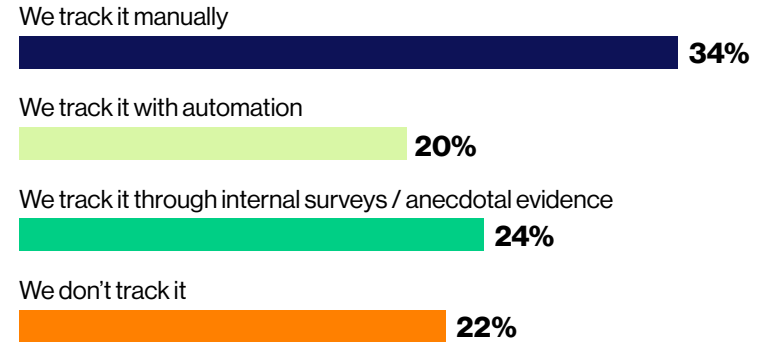
### How do you track tool adoption and utilization?



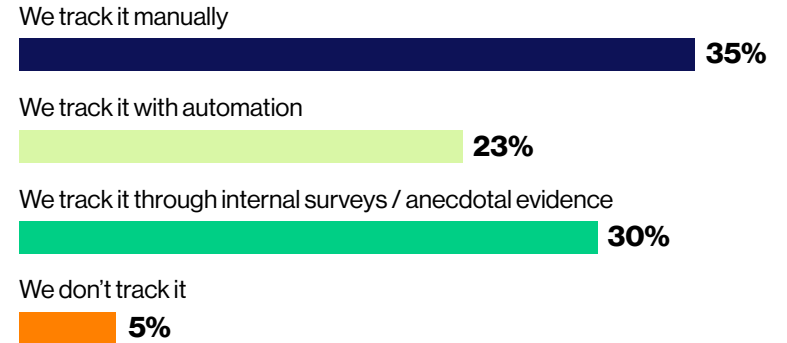
**SMALL**



**MEDIUM**



**LARGE AND ENT**



Across the board, manual tracking is the most common approach to tracking tool adoption and utilization, indicating room for improvement in automating these processes—especially for scaling companies. Large and enterprise-level companies are slightly ahead of smaller organizations in using automation to track tool adoption (23% compared to 20%), and are also more likely to rely on surveys or anecdotes (30%), compared to small (16%) and medium-sized (24%) companies. The latter could reflect the challenges of tracking usage across larger teams and more complex workflows, where direct observation may be more difficult.

Nearly ¼ of smaller companies don't track usage at all, highlighting a potential risk for inefficiency or tool underutilization. This may indicate that smaller companies struggle with the resources or processes needed to implement formal tracking mechanisms.

\* Most respondents who selected "Other" said either that tracking methods depend on the software, or that they use system-generated reports or in-product reporting



## Recommendations for tracking RevOps tool adoption and utilization

**Implement formal tracking mechanisms.** Even the most basic-level of tracking can uncover unused tools and adoption challenges, boosting the overall value of your tech investments.

**Establish clear metrics for assessing the ROI of each tool in your stack.** This will provide a concrete basis for evaluation and facilitate more informed decision-making.

**Upskill teams on using tracking tools effectively.** Training employees on tracking methods—whether manual or automated—fosters a greater appreciation for the importance of tracking practices. From there, it's a virtuous circle.

**Automate tracking to increase efficiency.** Automation can reduce errors and speed up tracking, offering a more efficient approach to collecting and analyzing data.

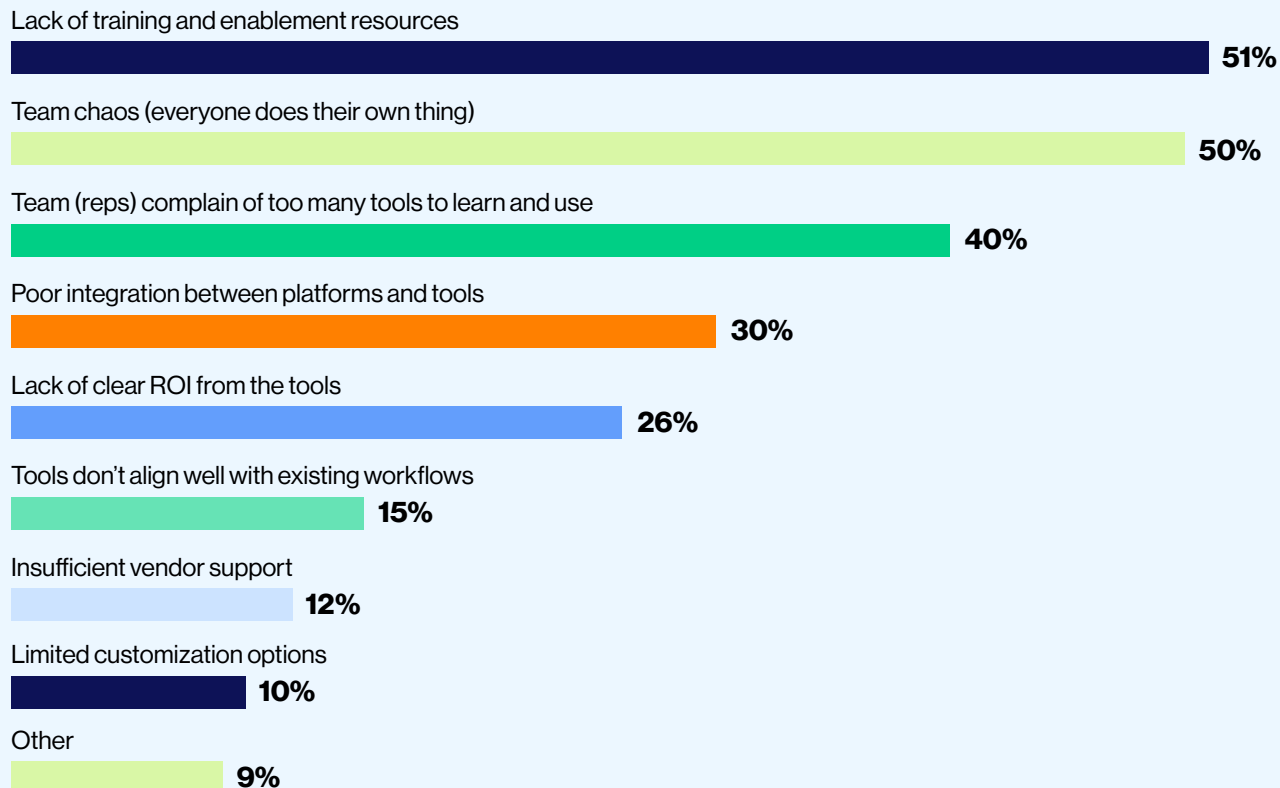
**Encourage feedback loops.** Implement feedback mechanisms that allow employees to share insights about tool effectiveness. This can enhance the review process and lead to more informed adjustments in the tech stack.

**Use a combination of qualitative and quantitative data.** While qualitative insights from surveys are important to capture employee sentiment, companies gain a more holistic understanding by pairing them with data-driven insights from automation tools. This combined approach provides a fuller picture of tool utilization and effectiveness.

**Implement frequent review cycles to monitor tool adoption.** All companies—especially those that track manually—should establish routine assessments for tool utilization data. This will enable early identification of underused tools, making it possible to implement timely changes or provide necessary training.

**Foster a culture of accountability.** Encourage teams to take ownership of tracking and reviewing tool usage. This could involve setting specific goals for utilization, promoting a sense of responsibility among team members.

## What are the primary barriers to better tool adoption for your organization?



\* Almost every respondent who chose "Other" said some version of "limited bandwidth" or "RevOps time constraints."

## The top-three barriers to tool adoption are the same, regardless of company size.

RevOps would do well to develop training programs tailored to different teams and roles, and to create support resources (think tutorials, FAQs, and knowledge bases) to assist with tool usage. Reduce chaos by establishing clear guidelines on which tools to use and when. Foster collaboration and gather input from team members to reach consensus on standardized practices. To simplify tool usage, assess the tools being used (see above!) and streamline the stack to the most essential tools that add value. Provide user-friendly guides or cheat sheets that summarize the key functionalities of each tool.



“It was hard to chase where the truth lived. Everyone operated with their own system. Rattle helps everyone focus on the right thing to do for each deal at the right moment. Since implementing Rattle, we’ve been able to normalize all our processes, and personalize our sales process to allow for variation between a \$50,000 deal versus a \$500,000 deal.”

**Shivam Shah**  
Director of RevOps

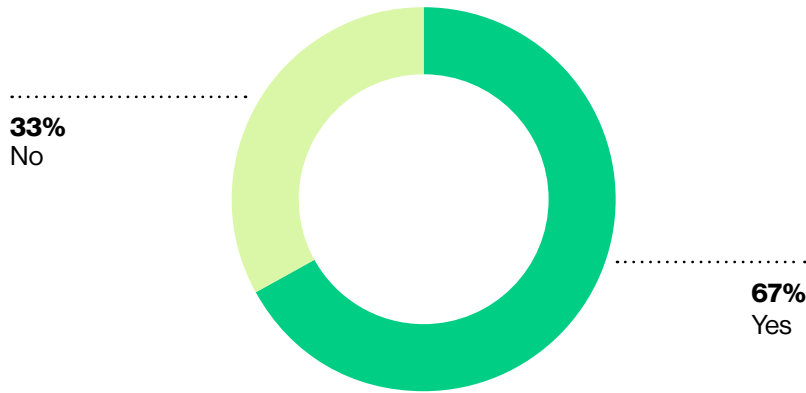
**Postscript**



# AI Adoption & Confidence

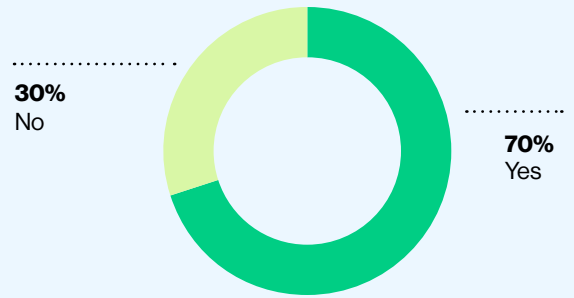
Despite the hype around AI, 1/3 of RevOps pros have yet to leverage it in their workflows. Yet 86% of respondents have medium-to-high confidence in the imminent value of AI. This explains why organizations are more open to allocating both budget and bandwidth for new technologies in 2025 than they were in 2024.

**Have you implemented any AI tools in your RevOps or SalesOps processes?**

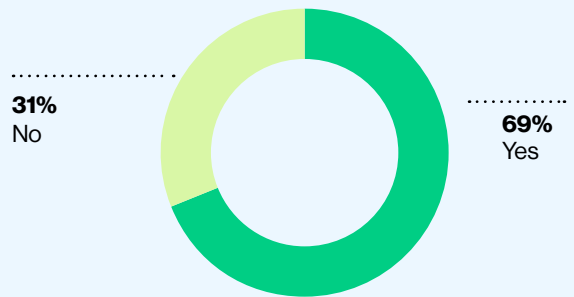


Considering the hype around AI, we were surprised to see such a large percentage of RevOps pros have yet to implement the tech for a single use case: 1/3 of respondents haven't started leveraging AI at all yet. And the larger the company, the less likely it is to have invested in AI tools by now: 10% *less* likely, in fact, than its smaller counterparts. Whether this is because smaller, younger teams have less legacy infrastructure, fewer bureaucratic hurdles, a stronger commitment to innovation, or cultures more likely to promote experimentation, the point is: they're competing for your share of the market with more advanced tools.

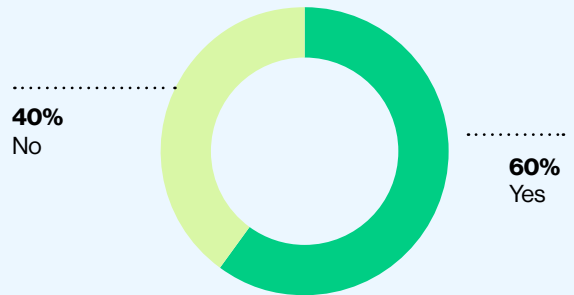
**SMALL**



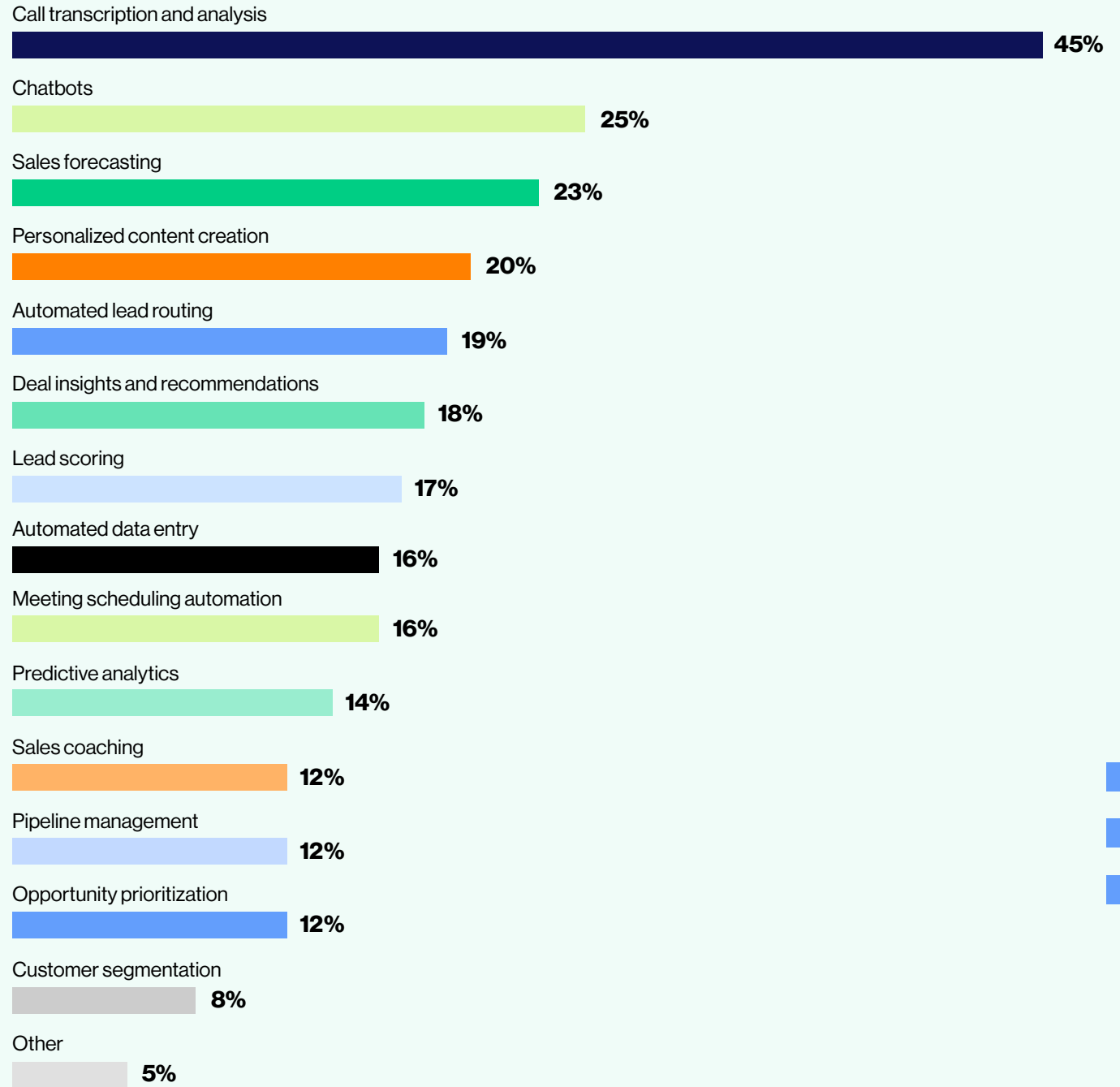
**MEDIUM**



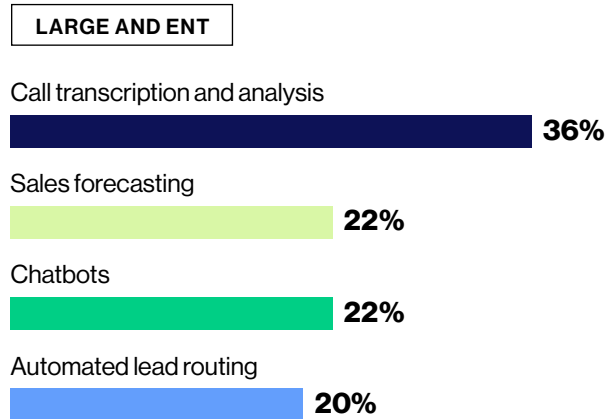
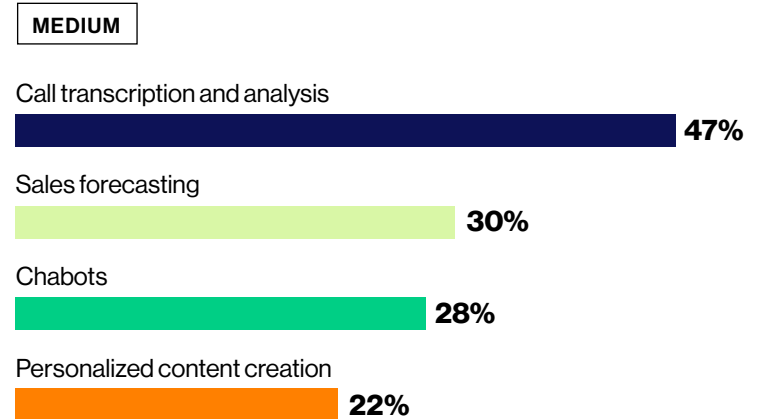
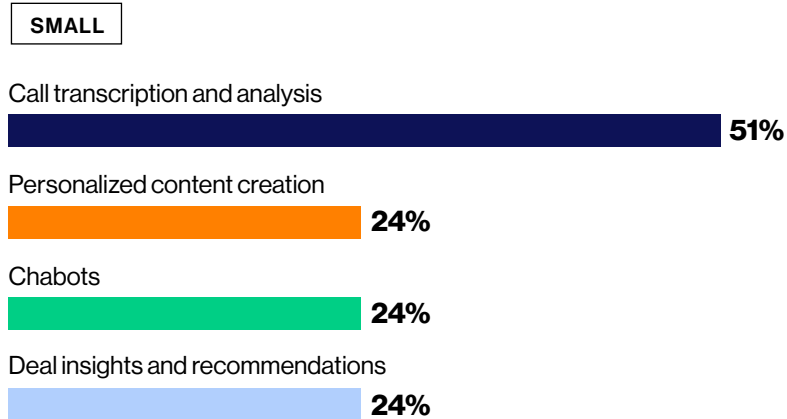
**LARGE & ENT**



### Which AI functionalities have you implemented?



### Which AI functionalities have you implemented?



Call transcription and analysis FTW. This is the most widely-implemented AI functionality, with the highest adoption rate among small companies (51%), followed by medium (47%) and large/enterprise companies (36%). Chatbots have similar adoption rates across all company sizes, indicating a broad interest in automating customer interactions. And while smaller companies appear more focused on tools that directly impact customer-facing communications (e.g., content creation), larger organizations prioritize scaling operations with sales forecasting and automated lead routing.

\* Respondents who chose "Other" included functionalities such as prospecting, marketing attribution, lead sourcing, and enrichment.

1 HOUR TO  
**2 min**  
DEAL INSPECTION

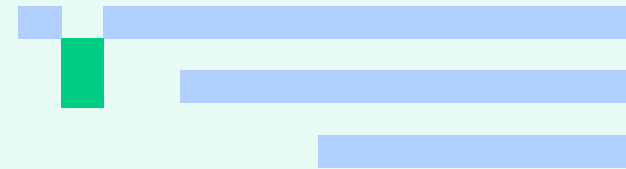


**+30%**  
WIN RATE

“If you minimize leakage at any step of the funnel, you’re adding value to the process... Rattle is the most useful application of generative AI for RevOps that I’ve seen yet.”

**David Ma**  
Head of GTM Ops & Strategy

**ZIP**

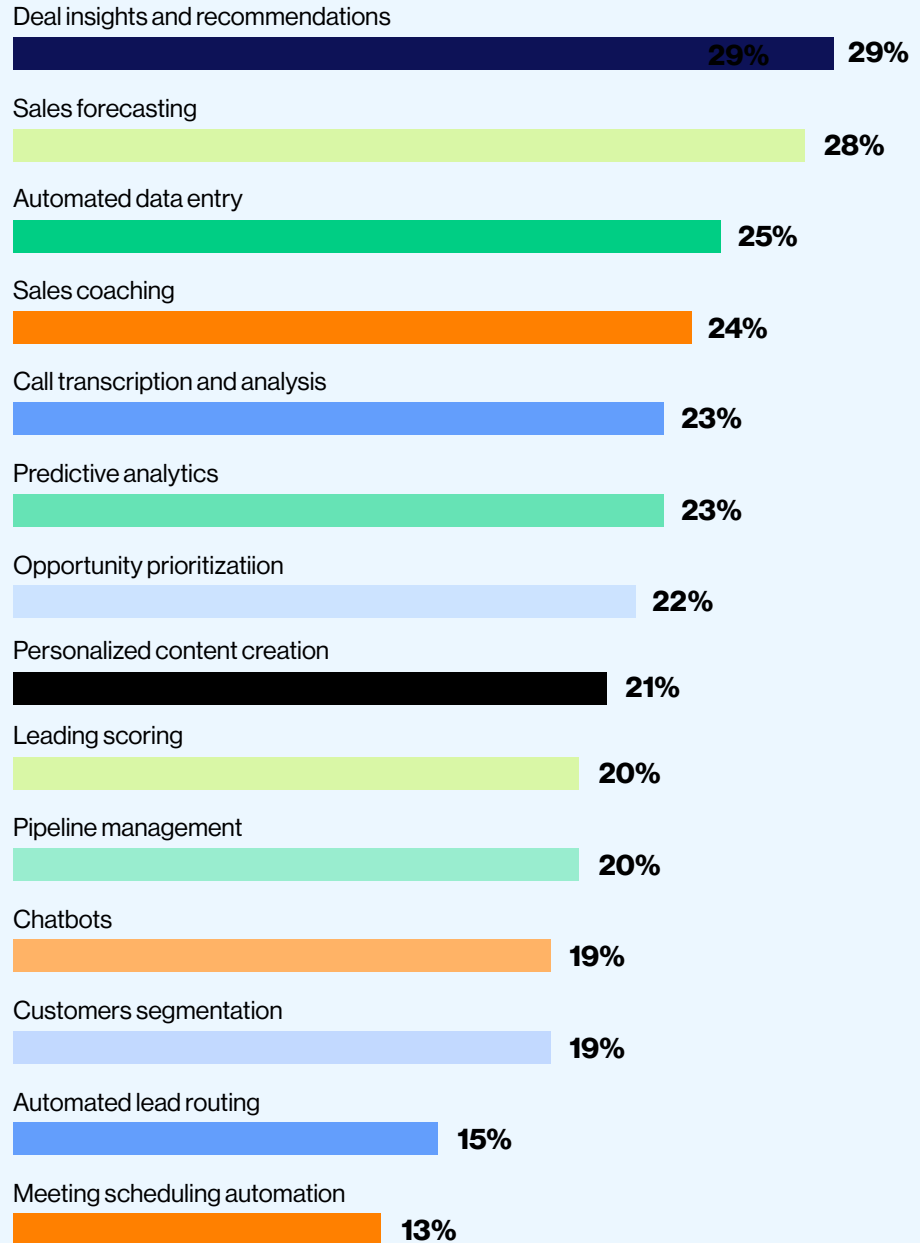




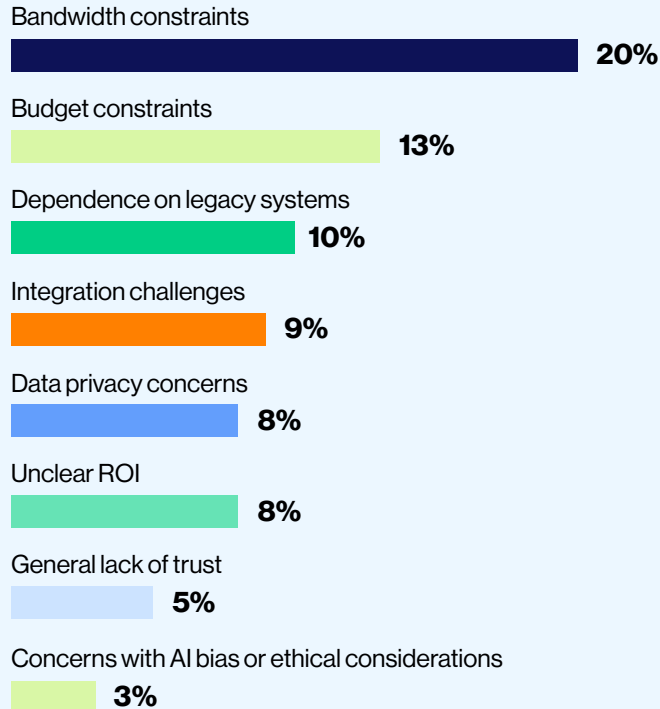
**Smaller companies are more likely to implement AI tools in 2025 than their larger counterparts are.**

For example, they're 10% more likely to introduce deal insights and recommendations features (37% vs. 27%) than large and enterprise companies are, 9% more likely to adopt sales coaching features (31% vs. 22%), and 8% more likely to adopt sales forecasting features (33% vs. 25%).

**Which AI features are you planning to implement in 2025?**



### If you're not using AI, what are the primary reasons?



The 33% of respondents reporting bandwidth and budget constraints indicates that financial and operational readiness is a key barrier to AI adoption for many organizations. These practical challenges are far more prevalent than ethical concerns (3%) or trust issues (5%) when it comes to AI implementation. RevOps is generally confident in AI's capabilities (including its ROI); it's the logistical challenges that pose the real barriers.

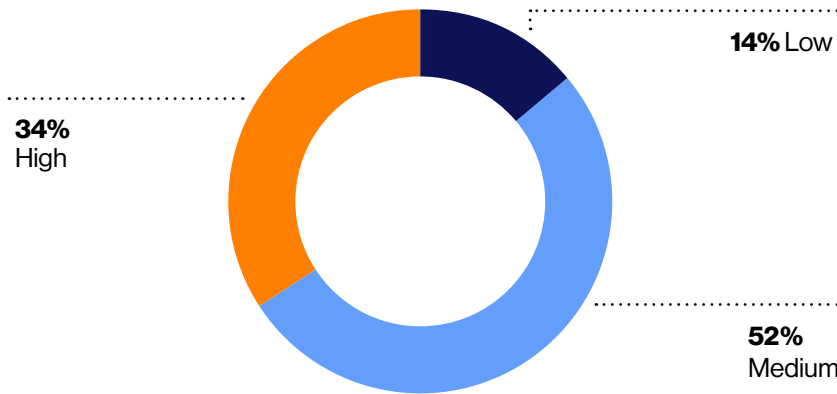
That said, respondents identified the same top-two challenges in our 2024 survey: 52% cited bandwidth constraints and 48% cited budget constraints last year. Those numbers have dropped significantly this year, indicating that organizations are more open to allocating both budget and bandwidth for new technologies.

---

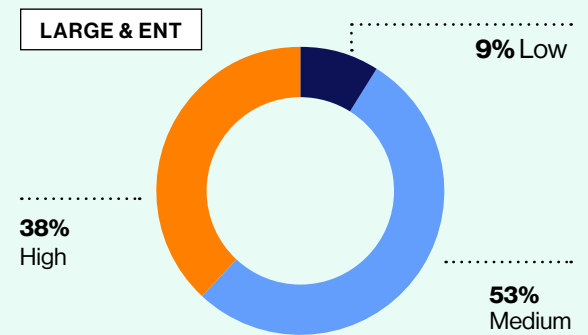
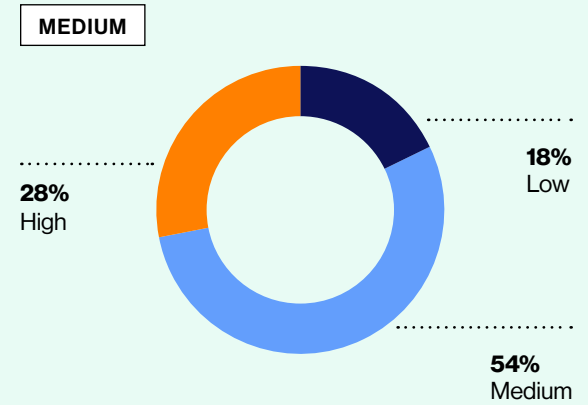
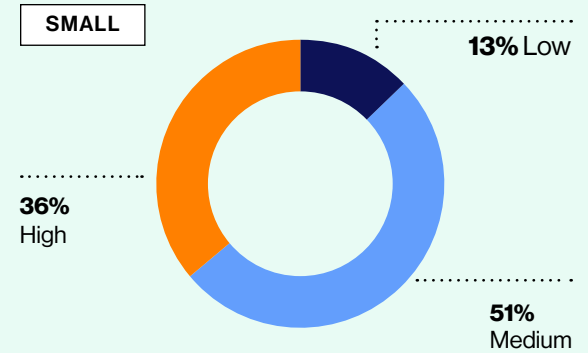
The 33% of respondents reporting bandwidth and budget constraints indicates that financial and operational readiness is a key barrier to AI adoption for many organizations.

---

**How confident are you that your organization will experience significant value from AI in 2025?**



A full 86% of respondents have medium-to-high confidence in the imminent value of AI to their RevOps departments, which bodes well for those who have implemented—or plan to implement—the technology in their stacks. We suspect the 14% who have low confidence in AI are those that haven’t implemented it: After all, an organization simply can’t benefit from a technology it doesn’t use.

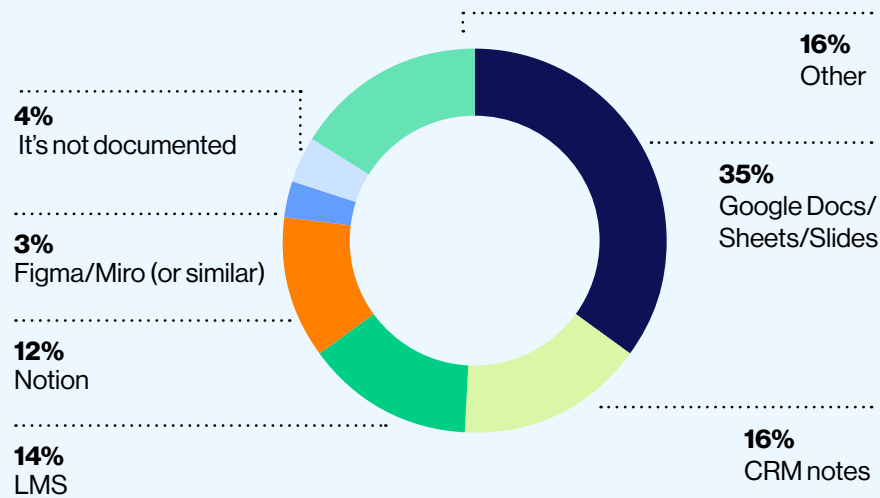




# Process Documentation & Manual Processes

13% of respondents say they either *rarely* or *never* review their sales process documentation, and nearly half still rely mostly or entirely on manual processes. So it's no wonder that only 1/4 of respondents have full confidence in the opportunity data provided by their Sales reps. (RevOps unanimously agrees: precious dollars are lost due to process issues!)

### How / where is your sales process documented?

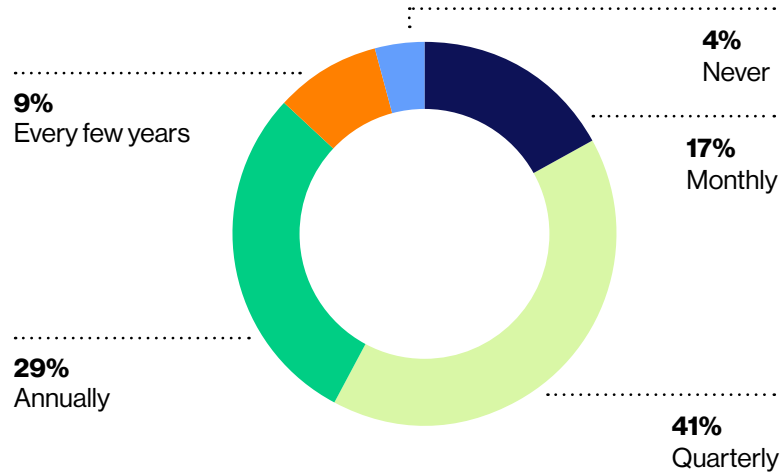


There's clear diversity in the documentation tools chosen by Sales leaders and RevOps professionals, suggesting that teams may be leveraging platforms designed for specific use cases (training, knowledge management, etc.) rather than traditional documentation tools. And while the majority of respondents (51%) document their sales processes with either Google Docs/Sheets/Slides or CRM notes, fewer than 15% say they use an LMS to capture their sales workflow.

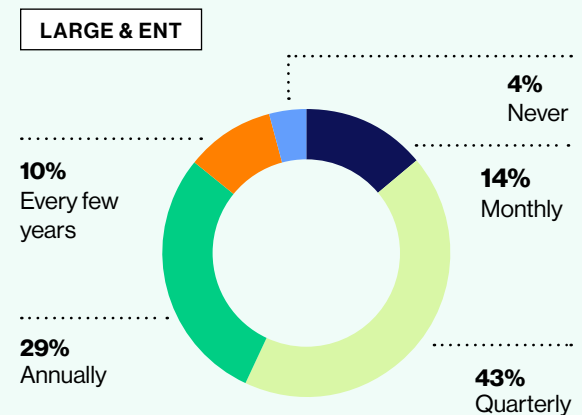
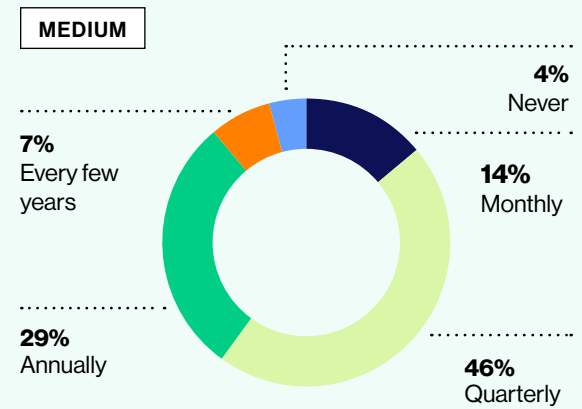
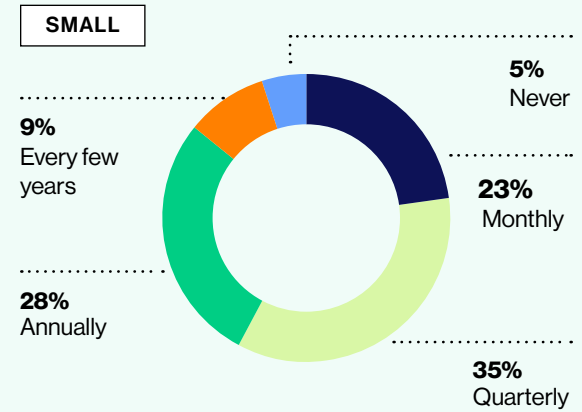
The potential gains here are substantial: Replacing static tools that require manual updates—the Google Sheets and CRM notes so many of you are using—with more agile systems like an LMS facilitates real-time data updates, certification and compliance tracking, and process performance analytics.

\* Respondents who selected "Other" included: Confluence, Seismic, SharePoint, Tetra, Coda, Spekit, Slab, GitBook, Lucidchart, Guru, Highspot, Loom videos, and a variety of combinations (e.g. Google + Confluence + Miro; Seismic + Salesforce; ClickUp + LMS).

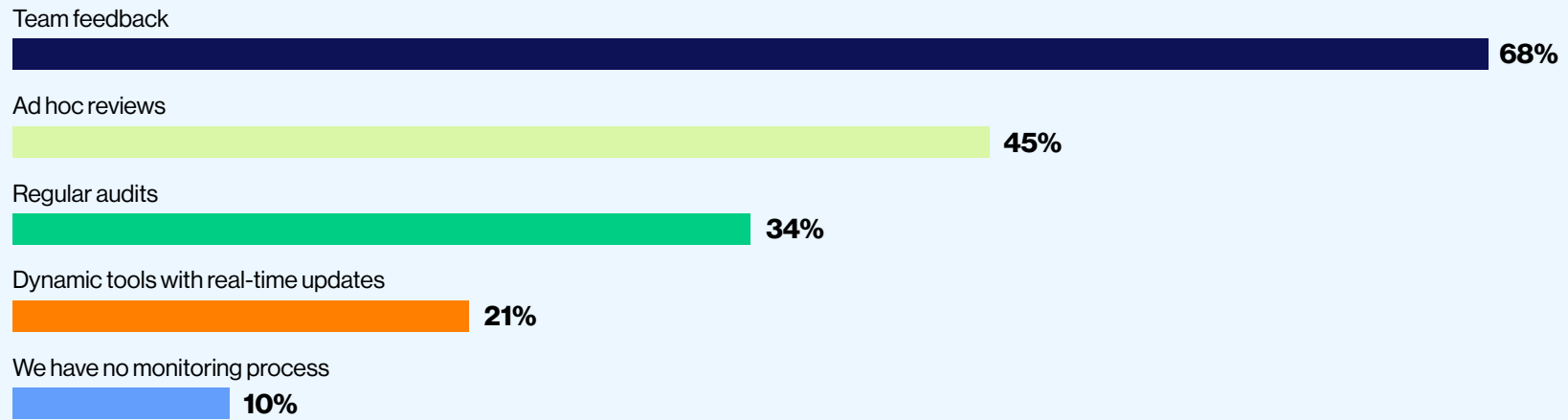
### How often do you revisit your sales process documentation?



Consistent with last year's results, quarterly reviews are still the most frequently implemented cadence. Smaller companies often review even more frequently: Almost ¼ (23%) revisit their sales processes monthly compared to medium and large companies (14% each)—a testament to smaller companies' agility and the likelihood that they're still fine-tuning their approach. Still, 13% of respondents indicate that their organizations either *never* review their sales process documentation, or do so only every few years. This segment of companies may be at risk of operating with outdated processes.



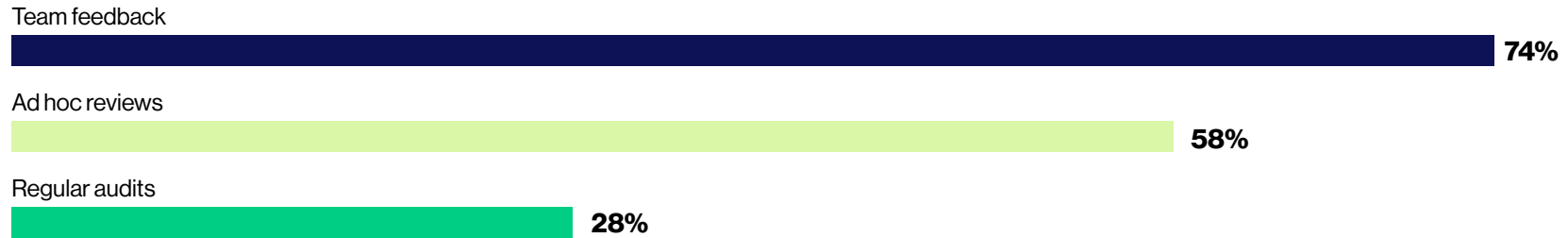
### What methods are used to monitor gaps in your sales process?



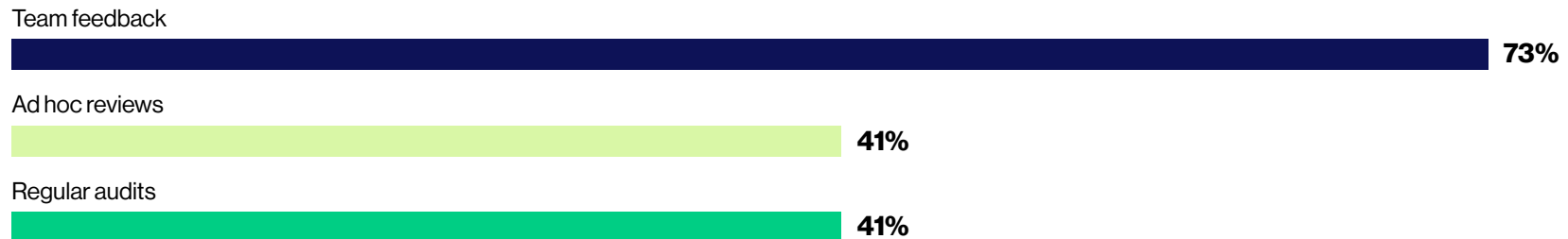


## What methods are used to monitor gaps in your sales process?

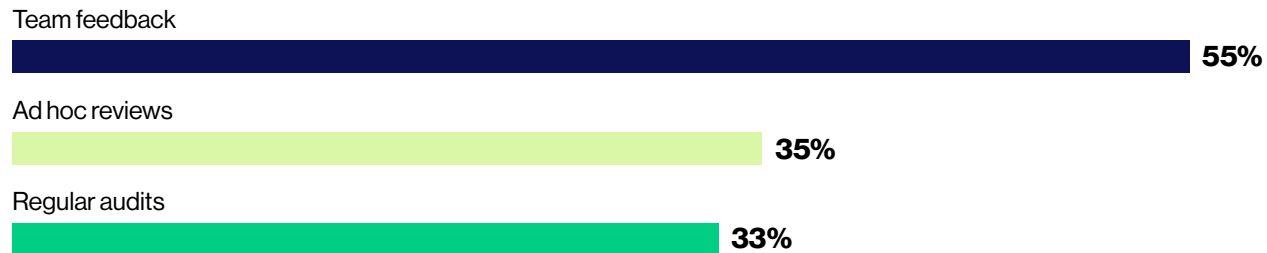
### SMALL



### MEDIUM



### LARGE & ENT





A significant majority (68%) of respondents leverage team feedback as their primary method for identifying gaps in the sales process: Your organizations clearly prioritize those frontline insights. Almost half (45%) of respondents utilize ad hoc reviews, suggesting a more reactive approach in which RevOps tackles gaps as they occur, rather than through planned, proactive evaluations. There's a lack of proactive, structured assessments in many organizations, as evidenced by only 34% conducting regular audits and just 21% employing dynamic tools for real-time gap monitoring.

There's room for improvement here, friends! Employing dynamic tools alongside regular audits can enhance your understanding of performance metrics, identify gaps that need addressing, and give organizations a competitive edge. (And psst! For that 10% of you who have no formal monitoring process in place, you could be missing out on important insights into gaps and opportunities for growth. We're cheering you on to develop a monitoring strategy.)



2 HOURS TO  
**20 mins**  
AVERAGE  
HANDOFF TIME

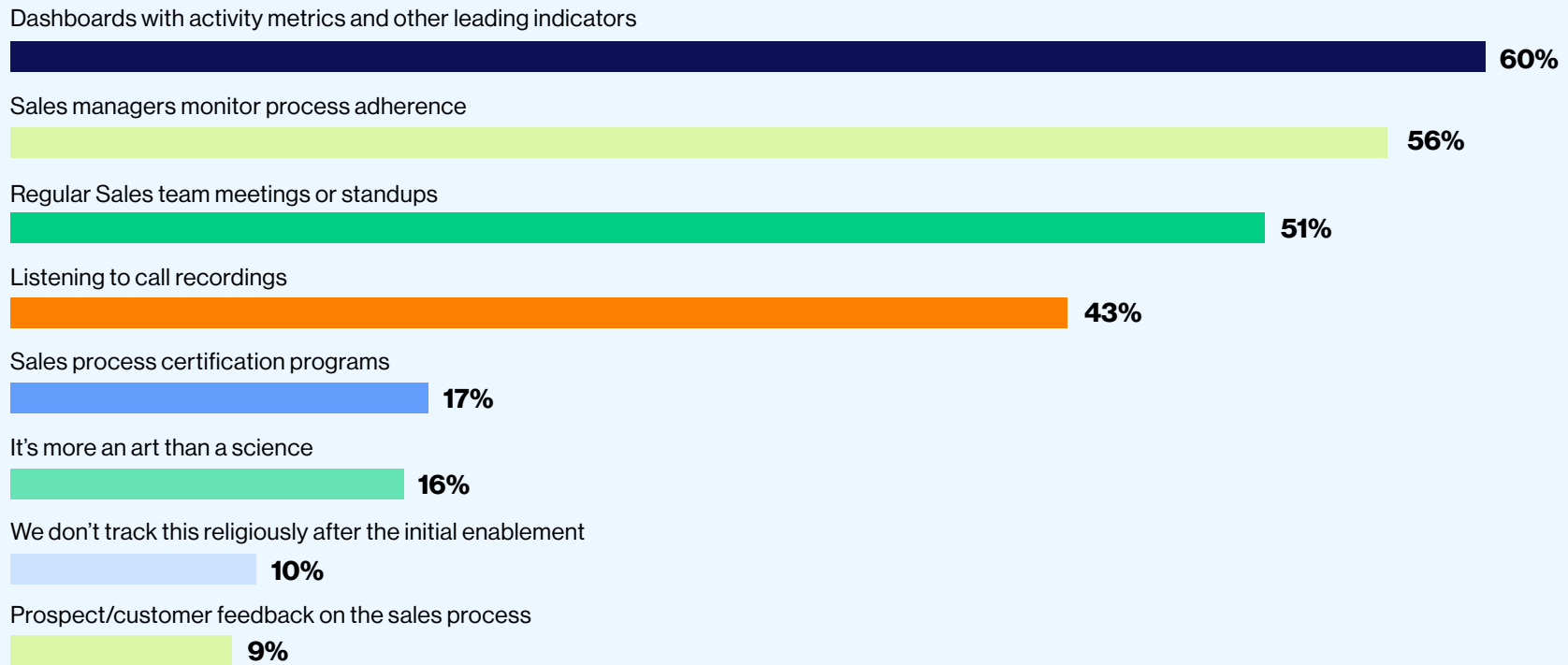
+11%  
WIN RATE

“There was no uniformity in the way we ran deals. That may have been OK a few years ago, but not anymore. Rattle has made me a better manager. The hand-off used to require a 2-hour call. Now it’s done in 20 minutes or less.”

**Zach Lawyrk**  
Head of Global Solutions Consulting

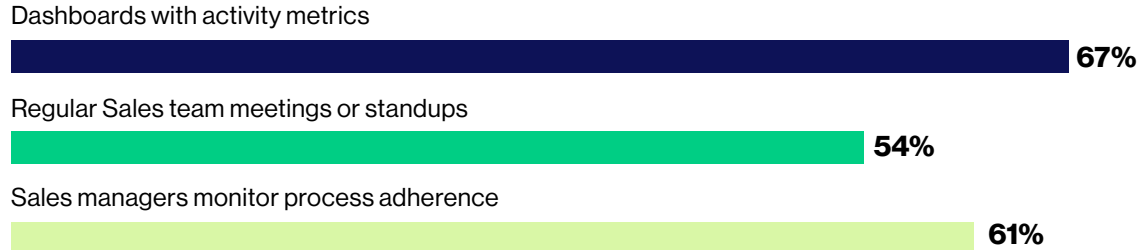


### How do you monitor whether the frontline Sales team follows the sales process?

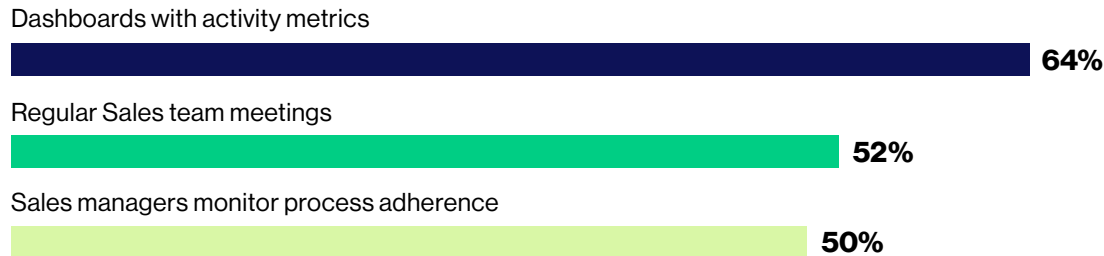


## How do you monitor whether the frontline Sales team follows the sales process?

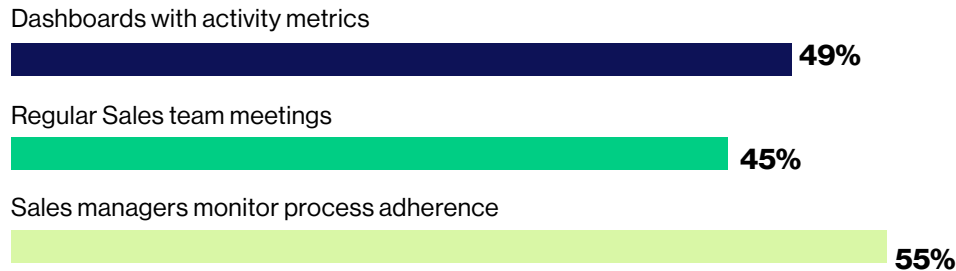
### SMALL



### MEDIUM



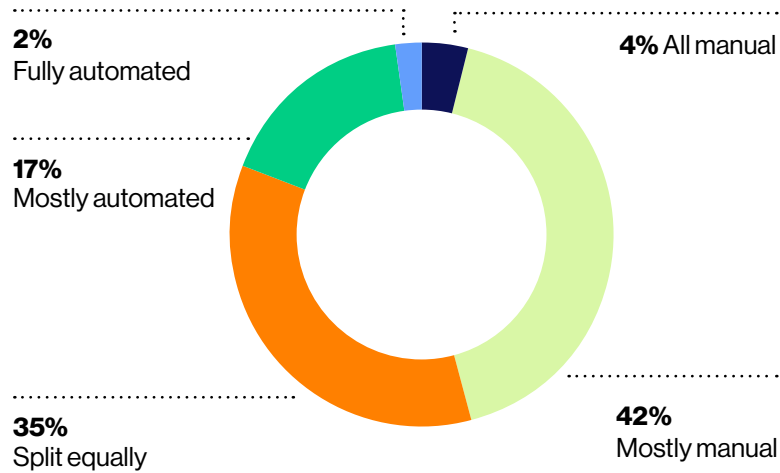
### LARGE AND ENT



The majority of organizations (60%) leverage dashboards with activity metrics to monitor adherence to the sales process, highlighting the importance of quantitative data for performance evaluation and informed decision-making. (Notice that overall, smaller businesses are doing more monitoring than their larger counterparts: They're nearly 20% more likely to be leveraging those dashboards than the largest teams are, for example.) 56% of participants highlight the vital role management plays in overseeing sales process compliance. And half of respondents (51%) depend on regular Sales team meetings to foster accountability and allow team members to discuss challenges and share best practices.

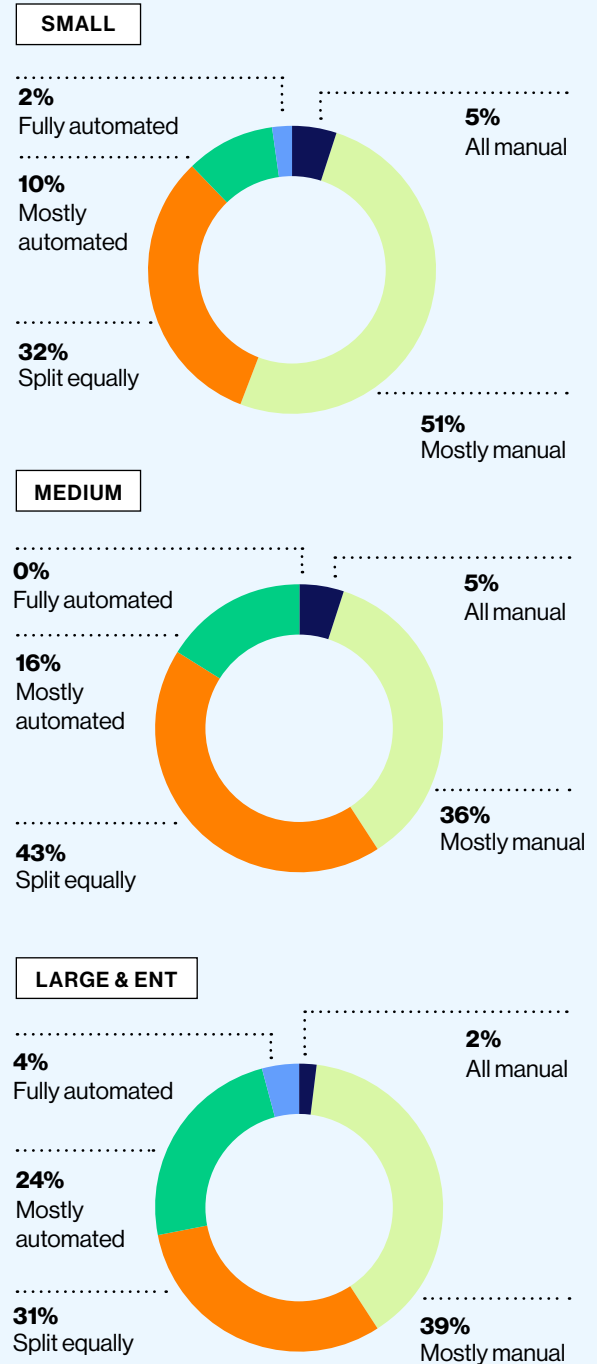
Still, the idea that monitoring adherence is "more an art than a science" is echoed by 16% of respondents, suggesting that there may be a level of subjectivity involved in assessing compliance. And alarmingly, 10% of respondents admitted that they don't track adherence religiously after the initial enablement, which could lead to inconsistencies and gaps in process compliance over time. RevOps, take note of where your areas for improvement are.

### How many of your processes are still manual rather than automated or AI-supported?

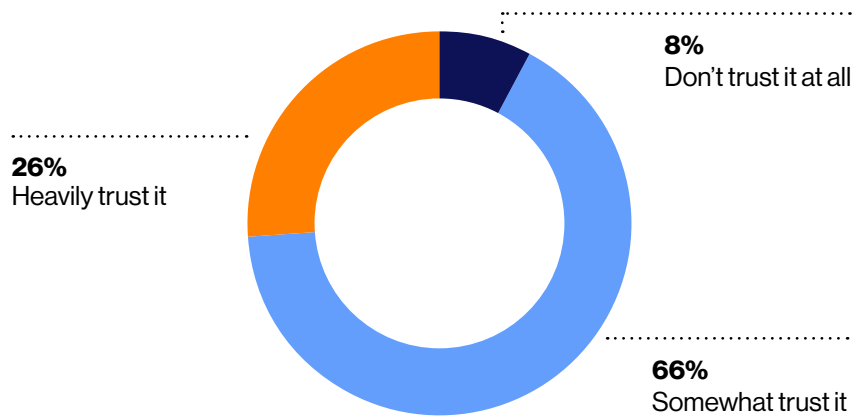


Organizations have considerable room to expand their use of automation and AI technologies: 46% still rely mostly or entirely on manual processes. The 35% of respondents reporting a 50/50 split between manual and automated processes suggests that RevOps is in a transitional stage, in which automation is being introduced but not yet fully embraced. (We suspect this has to do with the bandwidth and budget constraints discussed above.)

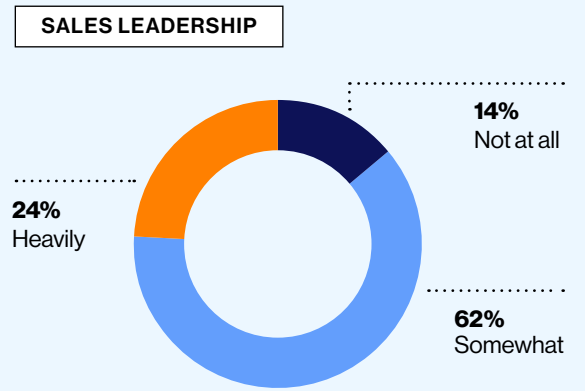
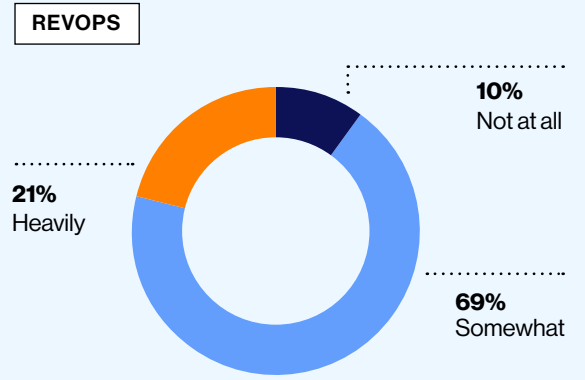
There's a clear correlation between company size and degree of automation, suggesting that larger organizations have the financial and operational capacity to invest more heavily in automation technologies. Still, there's a significant opportunity for organizations of all sizes to enhance efficiency, improve accuracy, and reduce operational costs by integrating more automated and AI-supported solutions: Even among the largest companies, 41% operate with processes that are fully or predominantly manual.

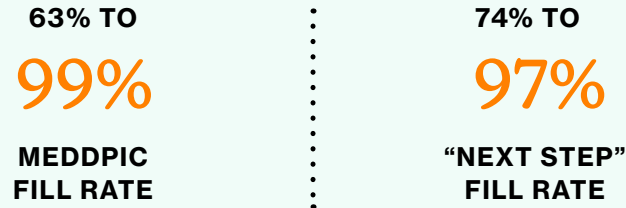


### How much do you trust the data that Sales reps enter for their opportunities?



Just 26% of respondents have full confidence in the opportunity data provided by their Sales reps—and 14% of Sales leaders don't trust their own teams' data at all. One-third of respondents (66%) occupy a neutral zone of cautious confidence in the accuracy of sales information. Respondents at the largest companies appear the most divided: Despite their resources, 10% of large enterprises don't trust their sales reps' data, suggesting challenges in data governance or entry compliance even at scale.

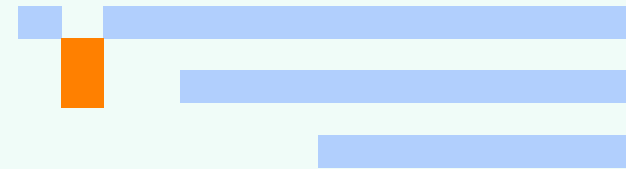




“Today, it’s incredibly rare for a next step to be missing or out of date. We make it so easy that the AEs have no choice... Before, you could spend all day chasing down hygiene issues. Now, with Rattle, that chase is over.”

**Mark Gremban**  
**Director of Sales Operations**

**Abnormal**



## Best practices to improve data accuracy and build confidence in the sales process

**Implement regular data audits.** Establish routine audits of the data entered by Sales reps to identify inconsistencies or inaccuracies. This will help catch errors early and encourage reps to be more diligent with their data entry. Tools like Salesforce or HubSpot can help automate the process.

**Enhance training programs.** Provide comprehensive training for Sales reps focused on the critical nature of data accuracy and proficient use of CRM tools. Emphasizing the value of accurate data in driving business decisions can help foster a culture of accountability. (Maybe you even recognize and reward team members who consistently provide accurate data, motivating others to follow suit.)

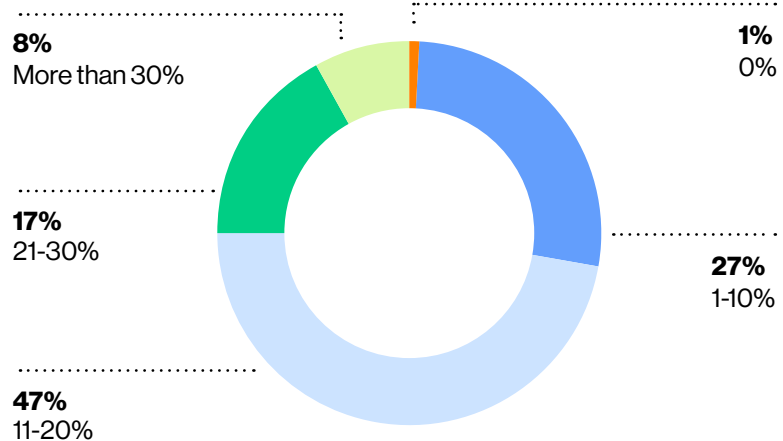
**Leverage data validation rules.** Set up validation rules in your CRM to ensure the data entered meets specific criteria. This can reduce the likelihood of incorrect or incomplete data being recorded, thereby enhancing data quality.

**Adopt process automation tools.** Rattle, for example, seamlessly connects your CRM with the communication tools your team uses every day, like Slack or Microsoft Teams. This bidirectional sync allows sellers to update the CRM without ever having to leave their workspace. We also alert sellers in Slack or Teams when data is missing or a deal requires action. (Think of us as the continuous tap on the shoulder for Sales reps to follow process.)

**Encourage collaboration between teams.** Foster collaboration between Sales and RevOps teams to create a feedback loop where data issues can be identified and addressed collectively. Regular check-ins can help both teams align on data expectations and requirements.

**Engage in continuous improvement.** Regularly seek insights from Sales reps regarding the tools and processes used for data entry. This will help pinpoint challenges and improvement opportunities, ensuring the systems in place are effective and user-friendly.

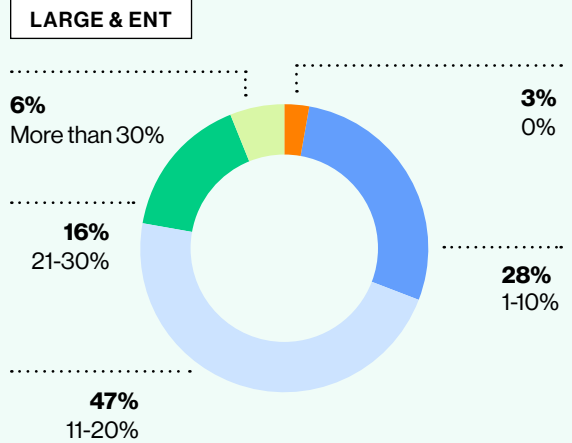
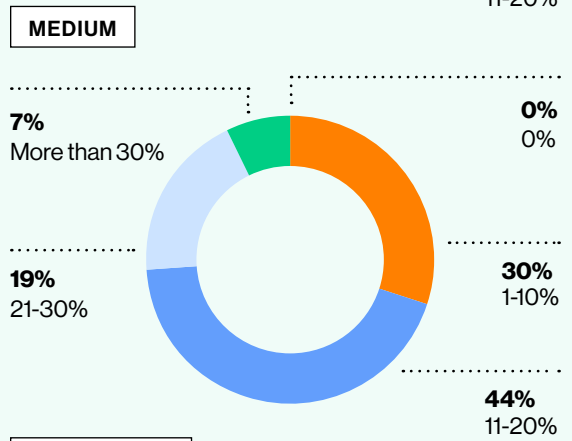
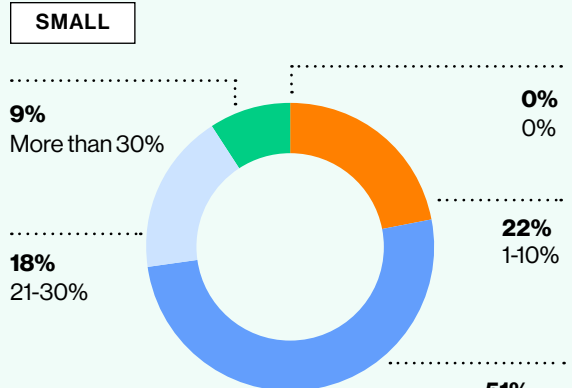
### How much of your revenue is potentially lost due to execution gaps in your sales process?



#### 99% of RevOps agree that precious dollars are lost due to process issues.

Nearly ¾ (72%) of you say you're missing out on more than 10% of revenue due to process gaps, ¼ (25%) of you are missing out on more than 20% of revenue due to process gaps, and 8% of you are missing out on more than 30% of revenue due to process gaps. The takeaway? Process gaps are costly. If you're generating \$10M in ARR and missing out on 20% of your sales opportunities, that's \$2M lost. If you're generating \$100M in ARR and missing out on 20%, that's \$20M lost. And onwards and upwards.

And here's the link: 42% of respondents say they revisit their sales process just once a year or less. And only 14% of you use a non-static method (LMS) for documenting your process. That's a recipe for stagnation, process gaps, and lost revenue. Process inefficiencies exist, in no small part, because RevOps is required to manually modify every document related to the sales process rather than employing a dynamic tool that adapts in real-time. But also: You're just not testing or analyzing the efficacy of your process often enough.



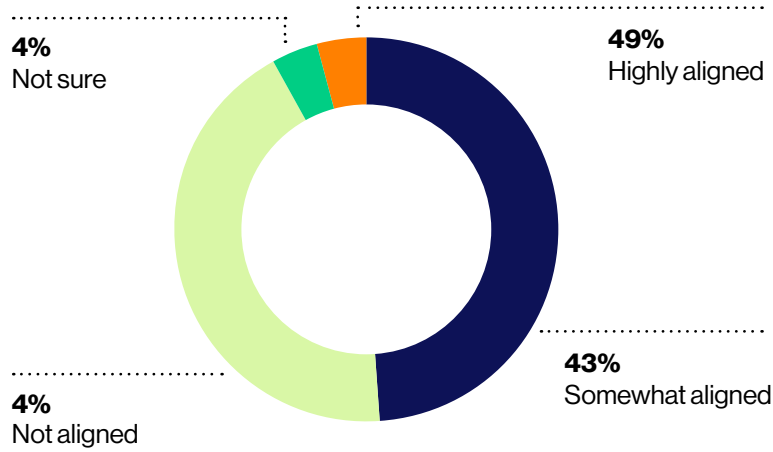




# Priorities & Alignment

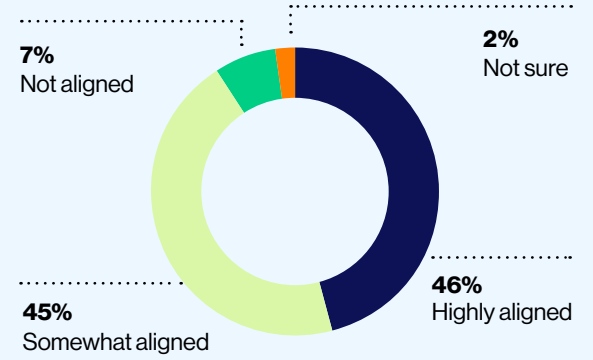
While nearly half of respondents cite strong alignment between RevOps and Sales leadership, the other half report that RevOps and Sales leaders are only *somewhat* aligned or not aligned at all. That said, both Sales leaders (57%) and RevOps (66%) rank sales process improvements as their top priority for 2025.

### How aligned are RevOps and Sales leaders on team priorities?

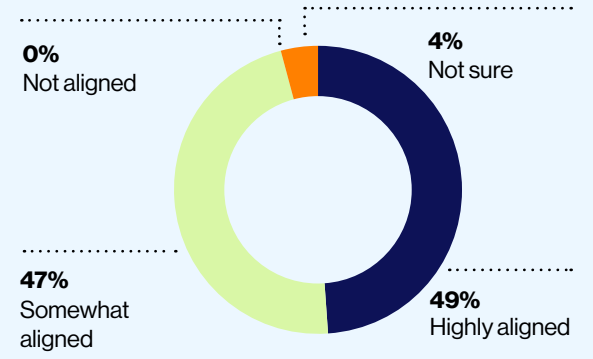


With 49% of respondents citing strong alignment between RevOps and Sales leadership, it's clear that collaboration is a priority. But there's room for improvement: 47% of respondents report that RevOps and Sales leaders are only somewhat aligned or not aligned at all. That's a considerable share of teams for whom improved coordination could enhance overall performance.

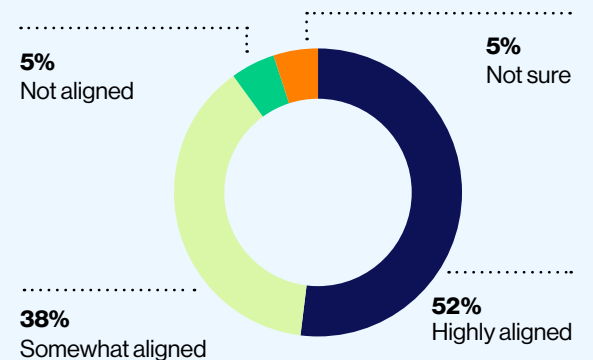
#### SMALL



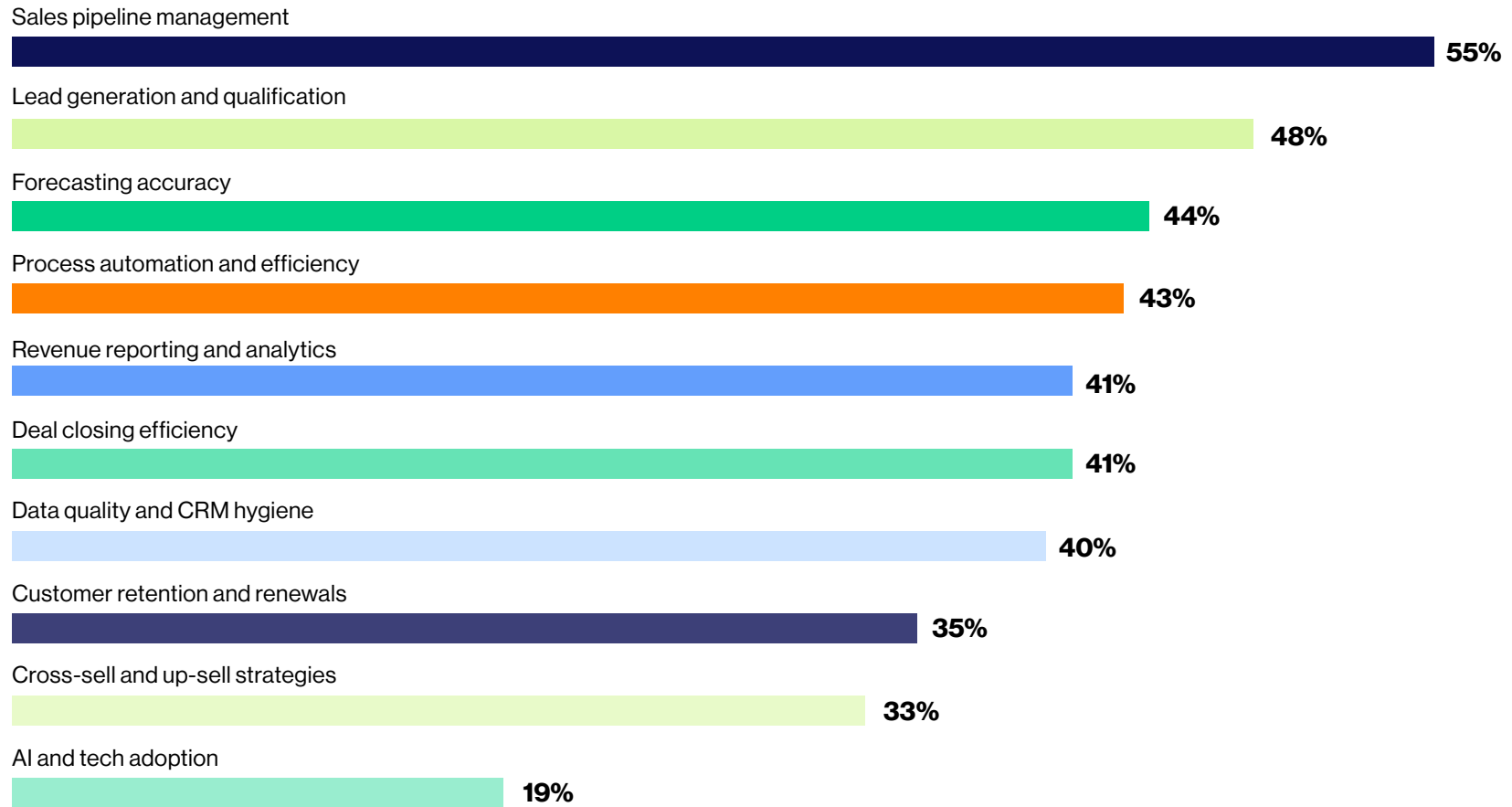
#### MEDIUM



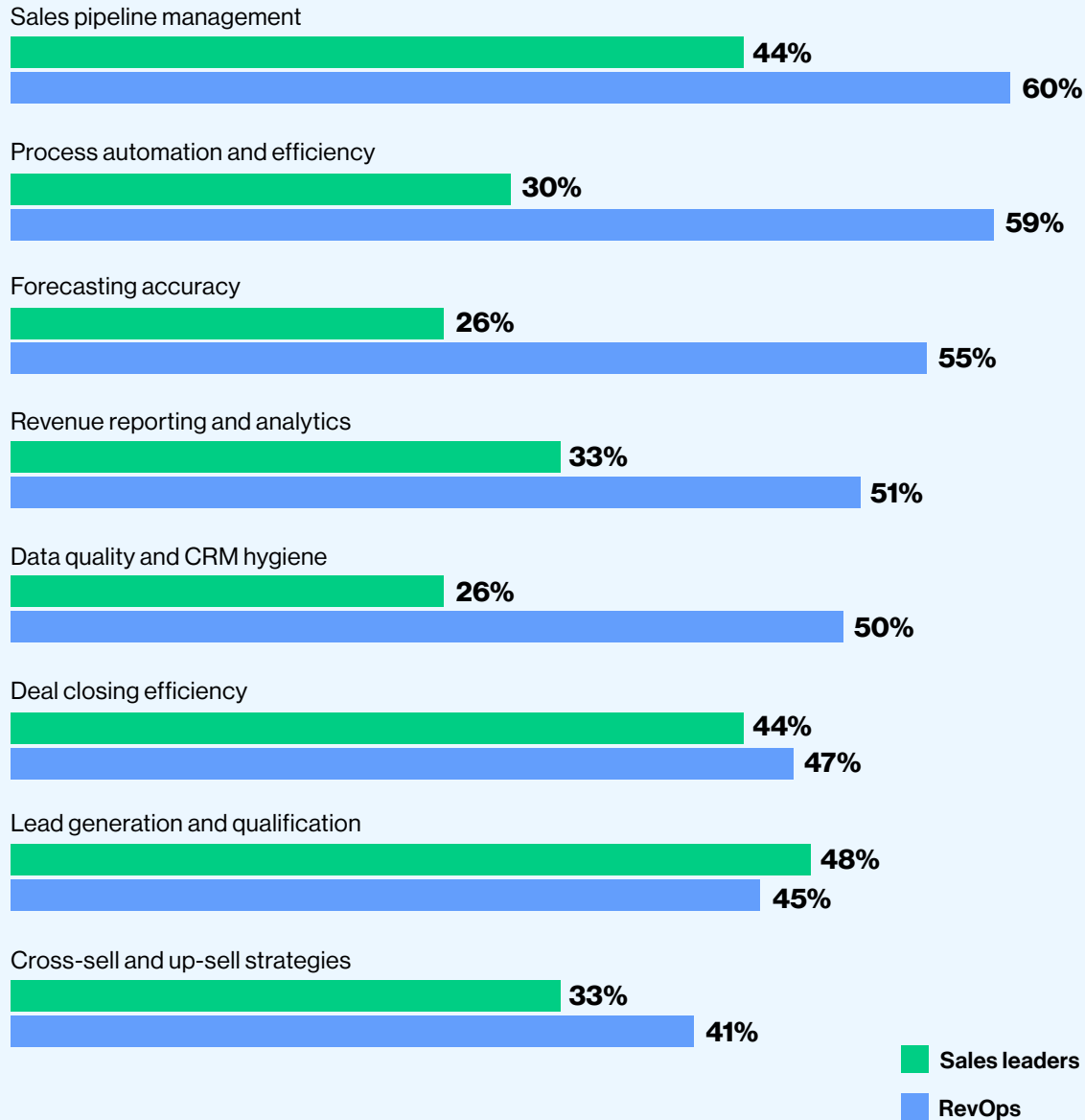
#### LARGE & ENT



### Which three areas of the revenue lifecycle are your RevOps/SalesOps team working on improving?



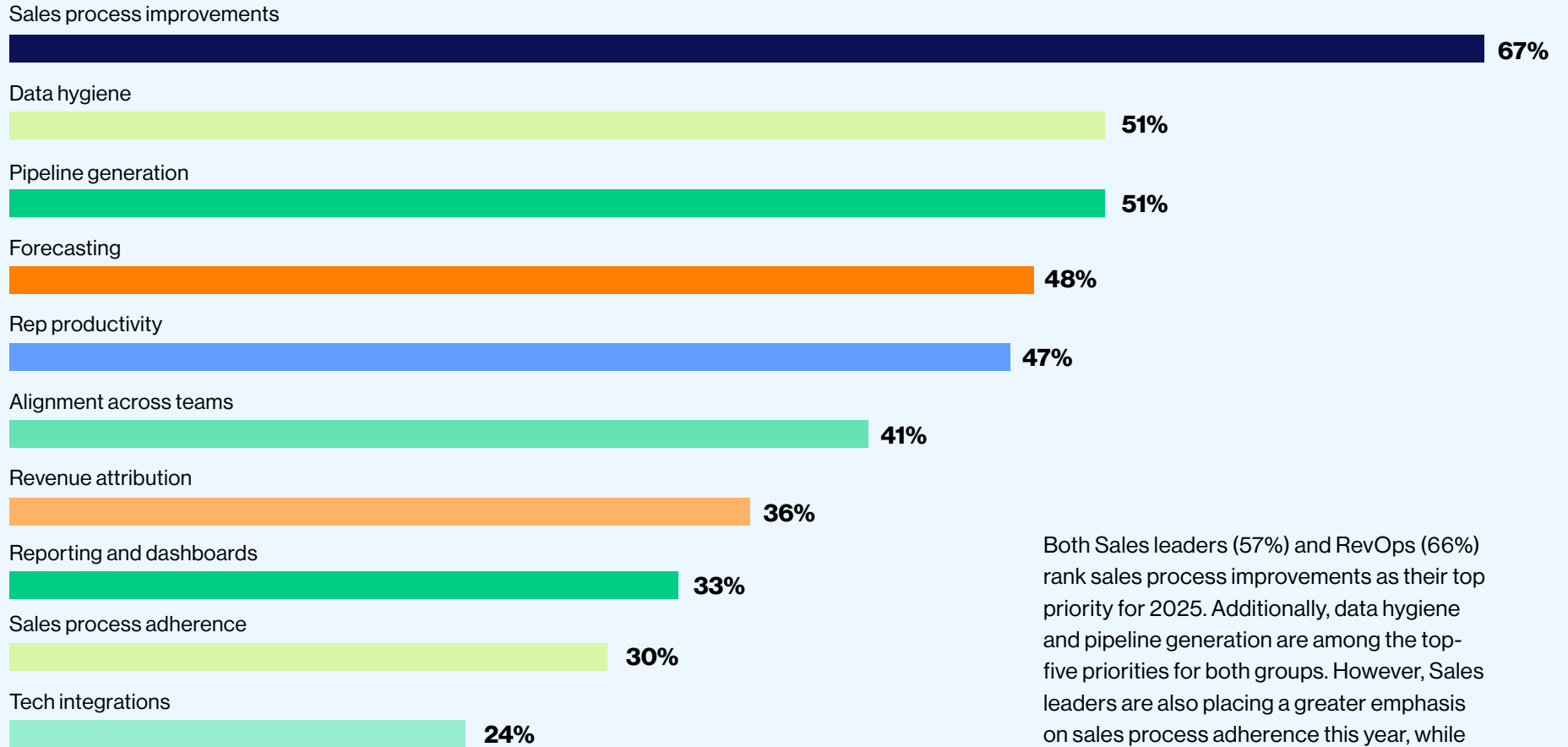
## Sales leaders/RevOps



While Sales leaders and RevOps align on some key areas—including sales pipeline management and revenue reporting—their top-5 priorities highlight different operational emphases. Lead generation and qualification (48%) and deal closing efficiency (44%) are top priorities for Sales leaders, reflecting their emphasis on improving direct sales activities and driving deals across the finish line. By focusing on cross-sell and up-sell strategies (33%), Sales leaders also aim to expand revenue opportunities within their existing customer base.

On the other hand, the priority given to process automation and efficiency (59%) illustrates RevOps' dedication to optimizing operations and facilitating seamless workflows. Prioritizing data quality and CRM hygiene (50%) signals that RevOps teams aim to maintain the trustworthy data essential for effective decision-making and performance evaluation. RevOps also places significant emphasis on forecasting accuracy (55%), which is crucial for long-term efficiency and predictability.

### What are your top 5 priorities for the upcoming year for your team?



Both Sales leaders (57%) and RevOps (66%) rank sales process improvements as their top priority for 2025. Additionally, data hygiene and pipeline generation are among the top-five priorities for both groups. However, Sales leaders are also placing a greater emphasis on sales process adherence this year, while RevOps prioritizes forecasting accuracy.



“We used to do this in a spreadsheet... Rattle can take a vanilla process that is working in a mediocre fashion and make it impactful for the entire GTM team.”

**Kieran Snait**  
VP of Revenue Operations



## About Rattle

The root cause of missed opportunities and lost revenue is often that sellers fail to follow process and update the team’s CRM. This leads to RevOps chasing reps to ensure compliance (not the best use of their time), waving incentives and nagging reminders to follow the sales process and update the CRM in a timely manner.

If established processes were consistently followed, data would be accurate and complete, leading to better data hygiene, far more reliable forecasts—and ultimately, more wins. This is a sweet spot for Rattle. In fact, our customers have seen:

IMPROVED FORECAST  
ACCURACY UP TO

30%



INCREASED WIN  
RATES

30% lift



SAVED  
IN HEADCOUNT

\$500K



IMPROVED DATA  
CAPTURE FROM

69% to 97%

Abnormal

REDUCED DEALS STUCK  
IN STAGE UP TO

70%





### **About the Author**

Lauren Shufran is a content strategist straddling the B2B SaaS space and the creative arts, where they collaborate with artists and craft narratives as a ghostwriter. They've led content teams at early-stage startups, building asset libraries from the ground-up; and they've got a PhD in 16th-century literature. When they're not wordsmithing, they're hiking the hills of Marin County. Come at them with your favorite Shakespeare quote.

## Learn More About Rattle

If you'd like to learn more about how Rattle can help your organization, please visit our website for more information or schedule a demo with our team [here](#) or by using the QR code below. We look forward to partnering with you on your path to success!

