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What to Expect with an OpFocus Operational Roadmap and Growth Services



# Do You Want To Sustain Long-Term Growth For

### Years To Come?

If you are facing barriers preventing you from rapid growth such as internal misalignment, a disorganized tech stack, or unreliable data—it doesn't have to be that way.

Where do you want your organization to be a year from now? What about 3 years from now?

There are two paths on the road to revenue growth, one leads to success and one leads to failure.

#### Continue doing what you always have

You continue to struggle sharing internal goals, your systems do not play well together, and you can not reliably forecast revenue growth. You continue to feel frustrated watching other investor-funded SaaS companies reach 2x or 3x annual growth. You're unsure of your organizations' ability to scale.

#### Take the steps necessary to achieve hypergrowth

You have internal alignment on goals to increase revenue, systems that are seamlessly integrated, and data you can trust. This builds momentum for your business seeing 2x or 3x annual growth. You're confident in your organizations' ability to scale.

If you prefer the first scenario for some reason, we'd love to show you it doesn't have to be like that. If you prefer the second scenario, you've found the right partner.



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# Who is OpFocus?

The value of our bench of consultants surpasses technical expertise, extending into the type of partnership we'll create.

#### **RevOps and SaaS Expertise**

OpFocus works exclusively with SaaS companies and knows what it takes to scale SaaS teams like yours.

#### Reliable Partners

We're a community of experts who partner with you to make Salesforce your single source of truth, so you can make data-driven decisions and scale ARR sustainably.

#### A People Driven Partnership

People are at the heart of every organization. Our partnership goes past solving your operational issues and extends to reaching growth targets.





You are a good fit if you answer yes to any of the following



Acquiring other companies

 Experiencing friction in your Go-To-Market Stack

Experiencing changes in leadership

Seeing significant growth

"Our most recent round of funding placed a lot of emphasis on our ability to scale internationally and take on new lines of business. Investors wanted to look at all the different KPIs and the robustness of our go-to-market engine.

A lot of this fundamental work was supported by OpFocus."

Toby Carrington
VP of Revenue
Operations
Seismic

Not every team needs an operational roadmap and growth services. If you already have a comprehensive 12-18 month plan aligning operational priorities across departments, there's no reason to undergo a separate roadmap effort.

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# How do I engage with OpFocus?

- Operational Excellence Roadmap
- Growth Services
- Why do I need both together?





"OpFocus helped us think through how and what to prioritize for phase one. With their input, we put together a plan that enabled us to crawl, walk, run."

# **Operational Excellence Roadmap**

An Operational Excellence Roadmap is a list of recommendations based on an evaluation of your current processes, industry best practices, and what we know works for high-growth SaaS companies.

Sherrie Mersdorf SVP of Marketing Healthgrades



01

#### **Team Alignment**

We assign your team prework to evaluate your people's current state, process, systems, data, and governance. We then facilitate discovery workshops to identify the delta between your current Salesforce tech stack and your ideal tech stack to support growth.



#### **Prioritized Growth Recommendations**

Our Growth Advisors take the information from the discovery workshops and prescribe a prioritized list of recommendations. These recommendations will focus on optimizing processes, eliminating inefficiencies, improving data structures, and implementing tools & methodologies to support the scaling of revenue growth.



# Roadmap Deliverables

Your Roadmap looks 6-18 months out, recommending changes to your processes and tech stack designed to improve operational efficiency and accelerate growth.

Below are the three factors we include in our recommendations to inform

you on the best sequence of actions.

Level of Complexity how difficult is this project?

Perceived Urgency
how immediate of a need is this?

Estimated Cost for each Project

what is the lift in terms of cost and resources?





### Topics you should ask your Salesforce Growth Partner

Like most projects of this type, the cost of an Operational Roadmap depends on many factors. Operational Excellence Roadmap projects typically require an investment of between \$50K and \$150K. This cost includes the discovery process, review meetings, documentation, and final recommendations.

#### What factors affect MY Roadmap cost?

Multiple business units
Roadmap projects involving many business units are more complex and require more discovery.

Inclusion of acquired companies

Acquiring a new organization leads to many decisions on what to keep and what to retire increasing Roadmap duration.

Messy/over-engineered current states

Tech stacks that have a lot of unused or redundant platforms often take longer to sort out extending the duration of a roadmap evaluation.





## Topics your Salesforce Growth Partner should ask you

- A new round of funding
  Closing a Series B or C gives you a resource
  boost and growth mandate to begin a roadmap
  engagement.
- A lull in sales or success cycles
  A seasonal lull in your sales or customer
  engagement cycles is an ideal time to take on this
  sort of project.
- A new product launch
  Your current revenue growth strategy is adequate for your previous offering, but what about with the update?

- Navigating an acquisition
  Acquisitions can be an arduous task to
  accomplish on your own. A roadmap successfully
  navigates.
- A new growth goal
  Scaling for hypergrowth after setting a new goal
  means you have to reevaluate your operations to
  maximize your organization's potential.

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# What information should I prepare in advance of a Roadmap?

When you begin your Operational Roadmap, you'll want to start improving your organization as soon as possible. Prepare this information ahead of time to help our team quickly scope out the level of support needed for your team to reach its operational goals.

#### **Determine:**

- Members of your leadership team Each SME's barriers to achieving goals
- The level of interdepartmental alignment
- Growth goals for the company as a whole
- ✓ Your definition of success What your M&A roadmap looks like
- The number and types of Salesforce products & users



The products that make up your tech stack

Current renewal process



# Once I have the Roadmap, what comes next?

01 Prioritize Initiatives

The Roadmap is not the end of your growth journey--it's the beginning. Once you have the Roadmap document, it's time to decide on top priorities and dedicate resources to execute.

02 Bring on a Co-Pilot

Our team of seasoned Salesforce and RevOps experts stand behind our recommendations and are here to guide you throughout your implementation and optimization to navigate around pitfalls and common fallacies.

03 Accelerate Growth

You can rely on our advisors, consultants, and developers as an extension of your team, knowing your business and system as well as your in-house rockstars.



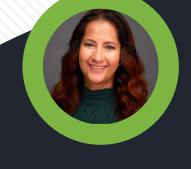
## **Growth Services**

Standalone, Growth Services stocks your team's bench with all-stars when your roster is overloaded and unable to catch up.

#### The key offerings from a Growth Services engagement include:

- Salesforce Expertise
  Filling platform-specific gaps
  on your team to accelerate
  projects.
- Project Management
  Providing consultation and
  guidance in planning growth.
- Bandwidth
  Teams tackling backlog projects your current team cannot accomplish.
- Flexibility
  Scale your monthly hours up and down as needed.

Growth Services is an excellent way to supercharge your team to catch up on backlog work, tackle new projects, or clean up tech debt. This subscription service ensures you have the right people to drive your projects forward.



"OpFocus really connected to the nature and speed of our business, and forced us to think into the future so we would have a system that worked well not just for today, but also for the longer haul."

Maribel Olvera
SVP of Operations
The Predictive Index

**Growth Services** 

# What does my OpFocus Growth Service team look like?

You'll work with a variety of OpFocus team members, including your account manager, dedicated engagement manager, and a team of specialists.

#### My Account Manager

They serve as your initial point of contact with OpFocus and will assist with connecting you with the right consultants who will best meet your needs.

My Engagement Manager with Growth Advisor

As Revenue Operations veterans, they know what it takes to eliminate operational roadblocks, lead your roadmap, and serve as your primary point of contact.

My Team of Architects, Consultants, & Developers

A team of OpFocus domain experts and developers provide insight and expertise when evaluating your current processes then create a detailed plan for addressing issues.

We select each member of your team based on the domain expertise, GTM frameworks, and tools your organization needs.



**Growth Services** 

# What factors impact your monthly spend for an OpFocus Growth Services project?



#### People

A team with veteran administrators with available bandwidth requires less assistance than teams with few resources.



#### **Process**

The more functions affected in your projects and the more complex your business processes, the more support your team will need.



#### Tech

Projects that involve multiple interconnected platforms with a series of integrations are more challenging and require more time from platform specialists.



#### Data

The more data sources involved in the audit and more reporting needs you have increases the project complexity.



#### **Timeline**

To complete a project in a short timeline requires a lot of resources compared to a project with a further deadline.

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bandwidth

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	People	Process	Tech	Data	Timeline
"Launch" \$10k+/mo	An abundance of in-house expertise and bandwidth	Well defined and efficient processes	An effective, well integrated tech stack	Clean, up-to- date data	Planning well in advance
"Momentum" \$30k+/mo	Some in-house expertise and bandwidth	Processes in need of optimization	Tech stack with some redundancies or inefficient	Some messy or outdated data	Urgent, but not on fire
"Hypergrowth" \$90K/ month	Little to no in-house expertise and	Inefficient or undefined processes	Ineffective tools and platforms that do not meet	Messy, duplicate, and outdated data	I need it done yesterday

your needs

"I've done many implementations during my career.
None went as smoothly as OpFocus."



Lynn Thayer Director of Revenue Operations Red Canary

# Why do I need a Roadmap and Growth Services together?

Growth Services provides resources to solve immediate pains while a Roadmap outlines the path to sustainable longterm growth. We want you to avoid taking actions now that don't align with the future-state you desire. Engaging in both ensures you solve today's problems while building towards tomorrow's objectives.

- Start Sooner
- Take Action
- Accelerate Growth



"OpFocus helped us envision and deliver the dream state. We wouldn't be where we are today without OpFocus' strategic guidance and expertise."

Brian Gates
SVP of Marketing and
Strategy RainFocus

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#### OpFocus Helps Analytics Leader Sisense Create an Actionable Salesforce Roadmap to Support High Growth and Funding

# to take a challend whether

# "OpFocus allowed us to take a step back and challenged us to consider whether we're doing things certain ways because of legacy or because we want specific measurable outcomes."

#### The Problem

Mike Sitter, VP of Business Operations, and Stas Daszkiewicz, Director of Enterprise Systems and Architecture, realized Sisense's need for a full rationalization between business processes and the architecture of the systems. Because the underlying technology stack had grown organically, it was siloed by teams and lacked governance. Data integrity was also problematic.

#### Solution

Sisense engaged OpFocus to develop a roadmap for rearchitecting Salesforce. OpFocus was recommended to Sisense by one of their investors, Insight Partners.

Sisense chose OpFocus for its unique approach, proven methodology, and deep Salesforce knowledge.

# Stas Daszkiewicz Director of Enterprise Systems and Architecture Sisense



#### The roadmap engagement had multiple workstreams, including...

- Building the right foundation for the go-tomarket technology stack
- Rearchitecting the Salesforce data model according to industry best practices
- Ensuring proper management of assets, customers, and business processes
- Updating and consolidating the tech stack, including turning Sisense's 7 price books and 2 pricing models into 1 book and 1 model

- Integrating with billing and accounting systems so Sisense can drive scalable growth, while ensuring ASC 606 compliance for revenue recognition and IPO readiness
- Putting a partner strategy in place and way to manage partner and professional services engagements for GTM
- Improving customer experience

To ensure Sisense's day-to-day Salesforce operations didn't have hiccups during the roadmap project, they also engaged OpFocus' growth services team for administration and business analyst work.

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# Roadmap & Growth Services Results

Validation & Acceleration

Sisense validated what the team believed to be true in terms of what they lacked and what they needed to do. They accelerated the development of a concrete timeline and action plan.

Governance & Change Management

Sisense identified governance and change management as critical missing parts of their operations. A lack of governance was hurting Sisense's ability to effectively execute on their growth projects.

Predictability

Sisense's roadmap creates the predictability needed for scaling and growing globally. They were able to get a plan in place and understand what the timeline does and doesn't encompass, so they can prepare everyone for the next milestone.

Good Will

Sisense garnered a lot of good will between departments. Because of the OpFocus discovery process, teams now understand their pain points.

**BEGIN YOUR OWN JOURNEY FOR GROWTH** 



"Companies on a high-growth path would be wise to consider OpFocus at the start of their journey. Their expertise and best practices around establishing corporate policies, designing and integrating systems and applications, and selecting the right tools for the job, are invaluable."

Wike Sitter
VP of Business Operations
Sisense

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# **5** SEISMIC

#### OpFocus Helps Sales Enablement Leader Seismic Break Down Silos and Facilitate Growth with Salesforce & CPQ

#### The Problem

Seismic Software has been growing by leaps and bounds, and for good reason. The challenge with growing so quickly, however, was that Seismic's own sales operations didn't fully mirror the same high levels of efficiency, alignment, and visibility.

The OpFocus Operational Roadmap with Growth Services brought them the Operational Excellence they've been looking for.

#### Solution

Seismic turned to OpFocus to help get Salesforce into the shape they needed. OpFocus kicked off the engagement with what Carrington dubbed "Big Rocks" — the underlying projects required to transform Salesforce into an efficient and trusted source for Seismic.

#### Big rocks included

**data hygiene:** This was key for ensuring accurate, quality data. OpFocus focused on cleaning up fields and shoring up the rules for which records were master records.

**tech stack audit:** pFocus catalogued the software in Seismic's extensive tech stack, investigated the use of each tool, and recommended which to eliminate, and best-of-breed tools to purchase

**lead lifecycle stabilization:** This focused on streamlining the process and rationalizing lead assignments so leads could be worked on quickly.

**acquisition integration & Salesforce org merge:** OpFocus helped merge the Salesforce orgs of companies Seismic acquired.

Once Big Rocks was completed, OpFocus implemented Configure Price Quote (CPQ). This was critical for enabling widespread visibility into deals and an organized, prescribed way for Seismic's 100+ sales people to generate compliant quotes efficiently.

"Not only is OpFocus
a Salesforce expert,
they're focused on highgrowth,
SaaS businesses like
ours, and have proven themselves
with other companies backed by one
of our investors, JMI Equity"

Toby Carrington
VP of Revenue Operations
Seismic

# Roadmap Result

#### Customer Experience

- Seismic broke down silos and strengthen alignment between sales and customer success using Salesforce CPQ.
- Seismic are much better positioned to care for their customers holistically and optimize sales opportunities.

#### Business Funding and Acquisitions

- Seismic merged Salesforce instances and consolidated tech stacks, becoming operationally successful with acquisitions.
- Seismic reinforced investor confidence in Seismic's ability to scale.

#### Bottom-line growth

- Seismic accelerated staff onboarding and made it possible for hundreds of people to accurately quote deals.
- Seismic automated this process, establishing more rigorous controls around discount rates.

#### Continuous Salesforce improvement

- Seismic has leveled up its Salesforce instance into something robust and suitable for their size, scale, and growth plan.
- Seismic's sales operations team can think more strategically about Salesforce and focus on ways to optimize it further.

"OpFocus is an extension of our sales operations team. They know our system back to front. Not only do I trust them to do whatever we need to enhance Salesforce, but I also rely on them for everything from change management guidance to advice on who to hire for our internal Salesforce administration team."

**BEGIN YOUR OWN JOURNEY FOR GROWTH** 

Toby Carrington
VP of Revenue Operations at
Seismic



### What's Next?

After reading this guide, you're thinking one of two things—either you have the information you need and have decided an Operational Roadmap either isn't right for your team, or it is and you want to know more information specific to your organization.

#### Meet with a RevOps Expert

If you fall into the latter category, the next step is to schedule a call to **meet with a RevOps Expert**. They'll speak with you about your organization in more detail and answer specific questions you likely have about timelines and cost. This call enables you to determine if it's time to move forward with an Operational Roadmap.

#### Align your team

Once you've determined it's the right time, OpFocus can help **align the rest of your leadership team** and generate buy-in.



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Your Rocket Fuel for ARR Growth

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