Revenue Operations Foundations and Alignment Training Course

10 – 14 May 2027
New York

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Ref: 1135_183840 **Date:** 10 – 14 May 2027 **Location:** New York **Fees:** 12000 Euro

Overview

Revenue Operations Foundations and Alignment Training Course is a one-week course for revenue operations, sales operations, marketing operations, customer success operations and commercial analysis teams who leave with an integrated RevOps operating plan. Participants align the revenue lifecycle through role clarity, lifecycle handoffs, process governance, CRM data governance, pipeline forecasting, shared revenue metrics and operating cadences. Agile Leaders Training Center develops revenue operations foundations and cross-functional commercial alignment.

Who Should Attend

- Teams responsible for coordinating marketing, sales and customer success operations
- Functions responsible for revenue-process definitions, ownership and handoffs
- Commercial analysts responsible for pipeline, conversion and retention reporting
- CRM and business systems teams responsible for shared revenue data
- Managers responsible for cross-functional revenue reviews and decisions

The course assumes participants can work with basic CRM records, pipeline reports and commercial processes, and it leaves out sales techniques, campaign execution, software administration and advanced financial forecasting.

Departments and Industries

The course supports departments and industries that depend on coordinated customer acquisition, conversion, onboarding, retention and expansion processes.

- Marketing, sales and customer success operations
- Commercial strategy, business systems and analytics teams
- Technology, software and subscription businesses
- Professional services, financial services and telecommunications
- Manufacturing, distribution and business-to-business services

Learning Objectives

By the end of this course, participants will be able to:

- Build a RevOps role and decision-rights map
- Analyze revenue lifecycle stages, ownership and handoffs
- Apply CRM data definitions and quality controls
- Use pipeline, forecast, conversion and retention measures
- Evaluate technology, workflow and dashboard requirements
- Build an integrated RevOps operating plan

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Course Agenda

Day 1: Revenue Operations Model and Role Clarity

- RevOps Operating Model Canvas
- Revenue Team Role and Responsibility Map
- Decision-Rights and Escalation Matrix
- Revenue Lifecycle Stakeholder Map
- Cross-Functional Alignment Diagnostic

Day 2: Lifecycle Processes and Handoffs

- Customer and Revenue Lifecycle Stage Map
- Stage Entry and Exit Criteria Dictionary
- Marketing-to-Sales Handoff Workflow
- Sales-to-Customer-Success Transition Checklist
- Revenue Team Service-Level Agreement

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Day 3: Data, CRM and Technology Governance

- Revenue Data Dictionary and Ownership Register
- CRM Record Quality Control Checklist
- Source, Stage and Status Governance Rules
- Revenue Technology Stack Capability Map
- Workflow Integration and Change-Control Log

Day 4: Pipeline, Forecasting and Shared Metrics

- Pipeline Stage and Coverage Review
- Forecast Category and Assumption Register
- Funnel Conversion and Velocity Dashboard
- Retention, Expansion and Customer-Health Scorecard
- Revenue Performance Review Cadence

Day 5: Revenue Operations Practice

- Exercise: Diagnose Role and Process Misalignment
- Exercise: Redesign Lifecycle Handoffs and Service Levels
- Exercise: Repair CRM Definitions and Data Controls
- Exercise: Interpret Pipeline and Retention Metrics
- Capstone Exercise: Integrated RevOps Operating Plan

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Practical Exercises

The course uses suggested activities to turn disconnected commercial processes and data into governed revenue operations decisions.

- Suggested activity: map ownership and handoffs for a software customer lifecycle
- Suggested activity: reconcile CRM stage definitions across a manufacturing sales channel
- Suggested activity: build a shared dashboard from pipeline, conversion and customer-health measures
- Suggested activity: design a revenue review cadence with decisions, inputs and accountable owners

FAQs

Who suits revenue operations foundations and alignment training?

Revenue operations, sales operations, marketing operations, customer success operations, CRM and commercial analysis teams suit the training. Participants should be able to work with basic CRM records, pipeline reports and commercial processes.

How does revenue operations training differ from sales operations training?

Revenue operations training coordinates processes, data, technology and measures across marketing, sales and customer success. Sales operations training concentrates more narrowly on sales productivity, territory, pipeline and sales-team support.

What belongs in an integrated RevOps operating plan?

An integrated RevOps operating plan contains role clarity, lifecycle stages, handoff rules, service levels, shared data definitions, CRM controls, technology responsibilities, metrics, dashboards, meeting cadences and improvement priorities.

How does CRM data governance support revenue operations?

CRM data governance gives revenue teams shared definitions, accountable owners, quality controls and change rules. It reduces conflicting reports and makes lifecycle, pipeline, forecast and customer-health decisions traceable.

Which shared revenue metrics support cross-functional alignment?

Shared revenue metrics include stage conversion, pipeline coverage, deal velocity, forecast movement, retention, expansion and customer health. Teams should define calculation rules, owners, review frequency and the decisions each measure supports.

Conclusion

Participants take back an integrated RevOps operating plan containing roles, lifecycle definitions, handoff rules, data controls, shared measures and review cadences. The plan changes disconnected commercial activity into coordinated revenue-process governance. It gives marketing, sales and customer success teams a common basis for managing pipeline, forecasts, retention and improvement priorities.