# HOW TO RUN REVENUE BY OPTIMIZING YOUR COLLABORATION AND GOVERNANCE

Clari

Running revenue at your company isn't just about a good-enough sales process anymore.

Between renewals and upsells, deal negotiation, and stakeholder involvement, truly running revenue today takes both a high amount of collaboration and a high level of governance.

**Collaboration determines what you do; governance controls how you do it.**

To remain competitive and secure every new logo, upsell, and renewal—you need both.

Up to 50% of today's employees are revenue-critical. But all too often "systems" boil down to CRM, spreadsheets, and business intelligence tools. They're three decades old and siloed by function, without a centralized focus on revenue. Marketing might have lead generation insights, sales might have CRM inputs, and customer teams might have renewal notices—but these aren't shared consistently across teams.

In this guide, you'll see how your company's revenue health measures up and how to create your ideal balance between collaboration and governance.

# WHERE YOU WANT TO BE

It's time to change how you make room for collaboration without sacrificing the control that your governance has introduced—with the overarching goal to be a more dynamic revenue org.

- For **your team**, this means leaning on shared processes and driving toward shared outcomes. You have what you need in place to motivate each member to take the right action, in the right way, at the right time.

- It means **your goals** are revenue-oriented and reflect the actions and collaboration of the entire GTM team.

- It means **your data** provides a single source of truth for everyone, from individual reps to your VP of RevOps. You can give (and get) real-time updates for all of your overlapping teams.

- Finally, it means that **your processes** aren't just documented and efficient—but also fully adopted and adaptable.

In turn, this kind of cohesion will translate into:

**Optimizing your collaborative spaces.** For example, your sales managers can spend more time directing action instead of reviewing past actions. With clear data and goals, they can come to each 1:1 ready to discuss what's already happened and how they can step in to support.

**Refocus coaching to where it will have the biggest impact.** Maybe your SDRs are booking meetings—cold outreach isn't the problem. But if your AEs are having trouble with next-stage conversion, there may be a qualification issue to dig into. Alternatively, if your numbers look good until Closed/Lost, it may be a financial or stakeholder involvement issue.

**Getting a better "health check" across the revenue org.** No more inaccurate forecasting. No more ineffective QBRs, with too much time digging into the numbers instead of the story they tell. With a more consistent cadence and async reviews, you'll be better equipped to connect the dots when it is time to get together.

# RevCG is about getting everyone inside the GTM org to dance to the beat of the same drum by allowing complete visibility and in-depth collaboration.

### Holly Procter
SVP Head of Global Sales at Clari

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But for you to get to this ideal state, you first have to have to understand where you are now.

In the matrix below, we've outlined four levels of maturity that we typically see with our clients here at Clari. In each quadrant, you'll see bullets for Team, Goals, Data, and Processes. Team and Goals reflect where you stand with collaboration, while Data and Processes connect to your governance skills.

## High Collaboration, High Governance
### [RevGG]

**Team:** By leaning on shared processes and a drive toward shared outcomes, you motivate each member to take the right action, in the right way, at the right time.

**Goals:** You create revenue-oriented targets and GTM strategy team-wide.

**Data:** You value a single source of truth and aim for automated, real-time updates for overlapping teams.

**Processes:** All adopted processes are documented for maximum efficiency and optimization.

## High Collaboration, Low Governance
### [Prioritization]

**Team:** Team members are clear on the "why" but not on the "how."

**Goals:** You lack a common anchor point to bring teams together around revenue.

**Data:** Without a shared dataset to manage against, you're unable to focus on the highest-impact actions. ("Without data, you're just another person with an opinion.")

**Processes:** Your deal and pipeline review cadences are irregular (and unregulated)—so it's hard to assess what's working and what's not working to improve processes over time.

## Low Collaboration, High Governance
### [Evolution]

**Team:** While key players are clear on tasks, they're unclear on shared responsibility or action items.

**Goals:** All targets are process-oriented instead of outcome-oriented.

**Data:** Although you record important information, it's siloed and hard to access.

**Processes:** Your procedures are highly documented, but leave little room for adjustments and flexibility.

## Low Collaboration, Low Governance
### [Foundation]

**Team:** Conflicting mandates result in misalignment and lack of collaboration.

**Goals:** "Busy work" outcomes don't provide a clear tie to revenue or retention.

**Data:** Access to information is manual, siloed, and slow.

**Processes:** Your systems are ad hoc and undocumented, resulting in inefficiencies.

Some organizations are super collaborative but lacking in the management and hygiene of their process. In contrast, other companies have established processes, but hyper-static tasks lead to lower collaboration among teams.

**Take a look at the four different stages above —do any of the descriptions stand out?**

**(Heads up:** You can also take our eight-question assessment here to get your specific results and next steps.)

Once you know where your organization stands, read on for more insights about your current state—and actionable steps you can take to improve in the future.

# LOW COLLABORATION, LOW GOVERNANCE

Your SDR performance is based on meetings booked, so they're throwing unqualified leads over the fence to your AEs—but your AE performance is based on revenue.

- Deal updates are irregular and often take up large portions of your 1:1s and sales team meetings.

- Forecasting is a chore, with more than a few manual (and often inaccurate) steps.

- Deal inspection has moved to the back burner since it's difficult to get the insights you need to improve.

**Does any (or all) of this sound familiar?**

That may be because your teams have little incentive for collaboration, and your leadership lacks what they need for effective governance.

If so, you're most likely facing an undiagnosed revenue leak. People don't know who to work with or how to best manage the sales process, which leads to poor stage conversion rates within the opportunity lifecycle.

**Long story, short: You're facing quite a bit of undiagnosed revenue leak.**

Here's the good news: You're in a great spot to build the right foundation for your growing GTM organization. This is our quick rundown of where you are, where you want to be, and some of the initial steps you can take to get there.

**Your Team**

Your team has conflicting mandates. For example, your SDRs are likely tasked with booking as many meetings as possible, with little or no regard for how qualified those opportunities are. In turn, your AEs are charged with closing deals—even as they jump on calls with poor-fit prospects.

It's a recipe for misalignment, creating a collaboration barrier among your sales reps (let alone other teams within the GTM org).

At the same time, you likely have multiple people touching any given deal. Without the right touches and inputs from the right team, you're facing longer deal cycles, lower deal sizes, and lost deals.

**Your Goals**

Your sales and CS reps are focused on "busy work" outcomes that don't impact revenue or retention. Your AEs are hyper-focused on what's directly in front of them, leaving little room or incentive for collaborating on ABM or better prospecting.

As a result, you're looking at a static, stale sales process: SDRs book the meetings, AEs convert to the next stage, Sales Engineers talk to additional stakeholders, and CS is heads down on implementation rather than communicating expansion and cross-selling opportunities.

You might have a handful of high performers at this stage, but without a clear shared objective, your growth is slower than it could be (or than you'd like it to be).

**Your Data**

Pulling data is manual, frustrating, and siloed by team, which makes reporting slow and visibility across your GTM org close to impossible.

In turn, you're left without a clear line of sight into what's working, what's not, and where you have opportunities to improve your sales process, retention, or expansion.

You can't solve what you can't see, and a poor reporting cadence means you struggle to identify your areas of revenue leak. Identifying revenue leak is the first step to solving it, and you can't identify leakage without visible data.

And that's just the high level.

On the ground, your sales managers spend most of their 1:1 and team meetings gathering updates on deal progression and individual rep numbers. There's little room for coaching, and none of the information that your team leads need in order to give guidance on how to progress an individual deal.

**Your Processes**

Your processes across the GTM org are ad hoc, undocumented, and ungoverned. You know there are inefficiencies, but you can't identify exactly where they are or how to optimize what you have running.

Your revenue meetings are largely focused on immediate outcomes instead of long-term planning and development. Your teams share pipeline progress on a weekly or bi-weekly basis, mostly through face-to-face reviews—time that your reps could spend selling.

**Your opportunity**

**Build the foundation**

It's time to take your first steps toward increased collaboration and governance.

You're in a great spot to lay the foundations you'll need to run revenue. But change doesn't happen overnight. Instead, here are a handful of next steps that you can put into action in the coming weeks.

- Take a step back to assess where the "breakage" lies in team collaboration. Is your team working toward quality or quantity? Are you making space for regular communication and input on deals?

- Ask yourself this question: "If someone were to game the comp system, where would they do it?" This will help you take a deeper dive into whether you're incentivizing the right behavior.

- Identify the process or tool you need in place to gather the data you need to make informed decisions. What will take this from a reactive process to a proactive one?

- Identify one recurring check-in or step in the sales process that will help you optimize what you have running already. Is it more regular deal reviews? Changing up the 1:1 agenda? Bringing in an additional person from GTM to the deal cycle?

# If you can't see it, you can't manage it.

**Holly Procter**
SVP Head of Global Sales at Clari

# HIGH COLLABORATION, LOW GOVERNANCE

Collaboration is nearly always a good thing, but what happens when your team is working together on the wrong thing or at the wrong time? You may be rowing the boat together, but you're bound to end up at the wrong destination.

Your revenue readiness score shows that you have a healthy amount of people influencing an opportunity, sales managers have effective relationships with reps, and AEs and SDRs are likely working closely, but there's no clear direction for any of it.

While your top-of-funnel numbers might look healthy, you most likely have revenue leak further down the opportunity lifecycle without realizing it.

## Why?

Because you can only take the right actions, at the right time, by bringing efficient governance to your collaboration.

For example:

- Can you quickly analyze the last dozen closed/lost deals to assess what went wrong?

- Can your sales managers ask for (and get) deal reviews as needed?

- Can you track outcomes from closed/won all the way through to retention and renewal?

In other words, there's a lot more to running revenue than your sales team working well together or playing nice with the marketing team. Collaboration is mission-critical, but governance establishes how to accomplish the mission in the first place.

Collaboration is mission-critical. But governance establishes the *how* behind collaboration, so that everyone is on the same page.

### Conor Nolen
SVP, Customers for Life at Clari

**Long story, short: It's highly likely that you're focusing on the wrong things.**

"If you don't have a standard (and accurate, and up-to-date) set of data that you're managing, you may be focused on MQLs when you really should be focused on conversions further down the funnel." –*Holly Procter, Clari SVP, Global Head of Sales*

**Your Team**

You have no problem hyping your revenue-critical teams up around new opportunities, closed/won revenue, and why they're working together toward shared outcomes.

But there's a problem: Without visibility into what's working and clearly defined processes, those same employees have trouble understanding how to collaborate effectively. Maybe they're wasting time manually updating the CRM. Maybe your sales managers have to get updates from SDRs during 1:1s. Maybe you have a high performer with a particular genius for closing, but you don't have a clear path to sharing their approach with the rest of the team.

Worse still, you might not have the right definitions and processes in place for collaboration across teams. Your marketing team might be working under a different understanding of MQLs than sales. Your customer success team might not be able to get feedback to AEs in time.

In other words: When you combine high collaboration with low governance, you leave quite a bit of your team's potential on the table—and you leave a lot of room for confused action.

That combination, in turn, opens you up to [revenue leak.](#)

**Your Goals**

While you might be able to get your teams excited about the long-term vision (and their comp), you likely don't have a clear line of sight into how each activity impacts key outcomes over an entire opportunity lifecycle.

Deal cycles can be long, and without continuous visibility into every stage, it's difficult to optimize what you have running—let alone motivate your revenue-critical employees to make changes to what they're doing.

Based on your assessment, your reps are most likely already working with marketing for acceleration—or even with your solutions team to build out business cases. But if you're not tracking outcomes beyond a static closed/won or closed/lost status, where does that leave you for optimizing around the goals for each stage of the life cycle?

### Your Data

Here's one of our favorites from project-management-great W. Edwards Deming: *"Without data, you're just another person with an opinion."*

Without a shared, up-to-date, and consistent dataset to reference, your revenue teams are unable to focus on the highest-impact actions on a weekly basis. This also prevents leadership's ability to effectively plan for longer-term headcount, forecasting, greenfield opportunities, and more.

Your data pulls for forecasting and deal inspection are highly manual; everyone from sales managers to the Director of Sales Engineering is either spending an inordinate amount of time collecting data or leaning on operations to pull it for them.

In short: Without good data, your team, your goals, and your processes suffer.

### Your Processes

Every revenue team needs consistent reviews to assess what's working, what's not working, and to improve processes (and outcomes!) over time.

But yours are most likely irregular and unregulated.

Without the right data pointing to the right goals, your 1:1s can be ineffective, your monthly team meetings can be chaotic, and QBRs and forecasting meetings are a mess to pull together.

CRM adoption is lower than you'd like it to be, handoff processes are reactive, and onboarding new reps can be a chore instead of a delight.

If any (or all) of that sounds familiar, it's because your org has erred on the side of collaboration instead of governance.

### Your opportunity

**Prioritize processes and streamline collaboration**

Moving from low governance to high governance is primarily about two things: individual behaviors as you drive toward data collection, and accessibility of insights as you drive toward consistent data utilization.

As you move toward these two outcomes, you'll be able to prioritize processes and streamline collaboration based on real, data-backed insights.

Typically, Clari customers start out with very little rigor; they look at the platform as the system they need to bring governance to their collaboration.

That's because you need both holistic, team-wide data and up-to-date data to consistently glean the insights you need for better governance. Once you have it, you'll have a virtuous cycle on your hands: a view that focuses your attention on what needs to be governed, which in turn creates the platform for increased collaboration.

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# LOW COLLABORATION, HIGH GOVERNANCE

In a healthy revenue org, there's always strong collaboration among teams: SDRs with AEs, AEs with Sales Engineers, Sales Engineers with Product, and so on.

You may have established processes in place for these handoffs and a robust meeting cadence for team meetings—but that doesn't mean you're creating space for true collaboration.

## Why?

Your marketing team is hyper-focused on MQLs, your SDRs are lasered in on meetings booked, your AEs put next-stage conversion above all else, and your CSMs likely feel left out of the loop altogether.

> Are success criteria shared among different teams? Are you incentivizing marketing and sales to collaborate on ABM or your SDRs and AEs to collaborate on deals?
>
> In a phrase: Are you motivating each member to take the right action, in the right way, at the right time?

**Kyle Coleman**
SVP, Marketing at Clari

Clari

**Long story, short: Revenue leak happens where teams meet—and if the processes at that juncture are overly rigid and overtly siloed, the leak is probably a big one.**

Here's how that impacts each area of revenue.

**Your Team**
Your revenue-critical employees are most likely clear on tasks because you have a high level of governance. But they're likely not clear on where their responsibilities are shared or where their action items overlap.

In turn, this leads to low collaboration among your SDRs, your AEs, your Sales Engineers, your CSMs, and so on. Sales likely feels the strongest amount of accountability to revenue—even though all of these teams (and more) impact the outcome.

Without setting up your processes in a way that encourages collaboration (and your governance in a way that makes it flexible), you won't have as many people influence an opportunity. With fewer people influencing opportunities, you're most likely losing deals—even if it feels like your process is nailed down.

Most likely, the sales team feels a strong level of accountability to revenue, even though there are lots of teams that impact revenue.
If those other teams don't have the right insights, there's no way that they have the same sense of accountability.

Holly Procter
SVP Head of Global Sales at Clari

### Your Goals

Based on your answers, your goals aren't as closely tied to revenue as they could be because you're operating your processes under short-term outcomes: MQLs generated, meetings booked, and opportunities created, instead of making room for the big picture (and optimizing accordingly).

Without shared goals across your revenue-critical teams, sales reps primarily work on deals with sales managers and AEs, with little room for involvement or input from other teams.

"If marketing is measured solely on MQLs or your sales team is measured solely on meetings, you're guaranteed to have a disconnect between the two," says Kyle Coleman, Clari SVP, Marketing. "They're not focused on the right things—the things that will impact revenue."

By way of example: Your SDRs might be booking a lot of meetings, but you're still struggling to hit revenue targets. It's time to take a step back and look at how the parts influence the whole.

### Your Data

With strong governance, you're most likely collecting data left and right. SDRs are dutifully updating the CRM, you have mostly up-to-date deal progress, and your leadership team has what it needs for QBRs and forecasting.

But recorded isn't the same thing as useful.

With data that's siloed to Ops or analysts, you close the door to opportunities for collaboration across teams. Without self-service analytics, you lose out on faster decision-making and new ideas (at least those that happen more than once per quarter).

You're ready for your data to be purpose-built for real-time and helpful analytics in an accessible way.

### Your Processes

Your processes probably feel solid: clearly defined outbound tactics, documented handoffs, qualified leads defined, and so on.

But they're also inflexible because they lack collaboration. You may have people following the right steps in their siloed teams, but when they don't work together, you can't refine or improve these processes over time.

You are confident that you're hitting your target and can do so repeatedly. But modern GTM processes are not aimed at a fixed target. Your prospect and customer needs are evolving. If your processes lack bottom-up collaboration to evolve in tandem, they will lose effectiveness over time.

**Clari**

# You might have an established process ahead of renewals, but how are you bubbling up risk when the AM team gets off a call with a client?

### Conor Nolen
SVP, Customers for Life at Clari

**Where your opportunity lies: Evolution to a flexible, outcome-oriented revenue org**

You already have processes in place—but are they optimized for the outcomes you're really looking for?

The opportunity in moving from "low" collaboration to "high" collaboration is in evolving your processes based on better insights, shared goals, and a closed feedback loop across the revenue org.

Start by asking: Are you motivating your marketing and sales teams to collaborate on ABM, your SDRs and AEs to collaborate on deals, or your AEs and CSMs to collaborate on renewal opportunities? Put another way: Are you motivating each team member to take the right action, in the right way, at the right time?

# HIGH COLLABORATION, HIGH GOVERNANCE

We've arrived at the peak RevCG state—working with both a high amount of collaboration and a high level of governance within your company.

Let's review real quick:

**Collaboration: How you run revenue.**

A solid collaborative process means many different roles within the organization influence revenue: from SDRs to Sales Engineers, from AEs to CSMs, and from RevOps to sales leaders. It's the opposite of a siloed, stage-by-stage sales process, making the entire thing more buyer-centric.

**Governance: How you control revenue.**

If good collaboration means you have everyone in the org dancing, good governance means you have everyone dancing to the beat of the same drum. High-quality governance means you have complete visibility into both big-picture insights and granular pieces of the life cycle.

What does all this mean for you?

**Your Team**

Your revenue-critical employees are leaning on shared processes to drive toward shared outcomes. This combination motivates each team member to take the right action, in the right way, at the right time.

Any revenue leak issues you've had in the past are mostly sealed up: your SDRs are passing qualified meetings to your AEs, your AEs are seeing higher conversion rates as a result, you're not losing deals due to addressable objections, and your sales and customer teams are collaborating effectively on renewal and upsell opportunities.

In one sentence: Your team can win more often, retain more consistently, and predict more accurately. (More on those outcomes below.)

**Your Goals**

You don't confuse activity with outcomes. Instead, your goals are both revenue-oriented and shared across the revenue-critical team.

The result?

Better collaboration: Your team members know what will be most impactful to work on for their own goals and for the company's goals. They have the right incentives to not only do their best work, but to share progress across the team.

Better governance: You don't waste time on vanity metrics or high top-of-funnel numbers while your bottom-of-funnel conversions suffer. You're able to dig into what needs adjustment faster.

**Your Data**

With automated real-time reporting and the ability to establish next steps for deal progress based on async data reviews, you're most likely relying on a single source of truth.

This has translated into faster, more accurate insights for everyone, from the CRO to the recently-ramped SDR.

It also means you've made huge progress in revenue capture and are well on your way to solving [revenue leak](#) completely. You can't solve what you can't see, but you're figuring out how to see what you can solve—and quickly.

**Your Processes**

You're holding quarterly planning meetings on top of forecasting meetings and regular revenue team reviews. You have dashboards, scorecards, CRM health, and opportunity data in place. You're on your way to a closed feedback loop that will improve your processes over time.

To sum up: Based on your answers, your processes are well-documented, highly adopted, and highly efficient.

But (and here's the important part) that doesn't mean you don't have room to continually optimize what you have in place now to remain competitive into the future.

**Your opportunity**

**A true RevCG strategy**

Congrats! You're ready to become a top-tier revenue leader—not just within your company, but across your industry.

But there are likely some areas that can improve: better cadences, faster reporting with automation, on-demand reviews for everyone, from SDRs to VPs.

It's time to ask yourself incisive questions to help you locate past, present, and future revenue leaks across your organization.

**Past:**
- "What were my win/conversion/expansion rates last year?"
- "How is my team trending this quarter?"

**Past:**
- "How should I handle this objection?"
- "Why are these deals stalling?"

**Future:**
- "What deals will get me to my number?"
- "What customers have expansion potential?"

RevCG gives you the granular insights you need to stop leaks across all three dimensions.

# You finally have a pane of glass that focuses your attention on the things that need to be governed, which then in turn creates a platform for increased collaboration.

## Conor Nolen
SVP, Customers for Life at Clari

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# WHAT REVCG CAN DO FOR YOUR REVENUE

In a survey of more than 2,000 companies, Clari Labs found that companies using a RevCG strategy saw a 24% increase in win rates and a 39% increase in revenue capture for committed deals and renewals. Combined with 96% accuracy in forecasting accuracy, these companies are growth leaders.

**None of that happened by accident.**

The Clari Revenue Platform provides real-time, confident answers to all revenue-critical questions about your past, present, and future so you can:

- Replicate past success—and pinpoint areas of strength in your business to achieve better and more consistent outcomes.

- Take action in the present—and execute with real-time insights for better outcomes today that affect tomorrow.

- Predict and hit in the future—and unlock better revenue outcomes with the most accurate forward-looking projections.

## ARE YOU READY TO RUN REVENUE  AS A PROCESS?

If you haven't already taken the Revenue Readiness Quiz, click here to receive your score.

Regardless of how you score in our quiz, you're ready for the next step on your revenue journey.
By tying data to processes to increase your governance and motivating teams with shared goals to boost collaboration, you'll get closer to visibility and predictability for your teams—and truly running revenue.

With Clari's Revenue Platform, today's revenue leak is tomorrow's revenue precision. Ready to see higher win rates, revenue capture, and forecast accuracy?

See Clari in action.