REVSURE
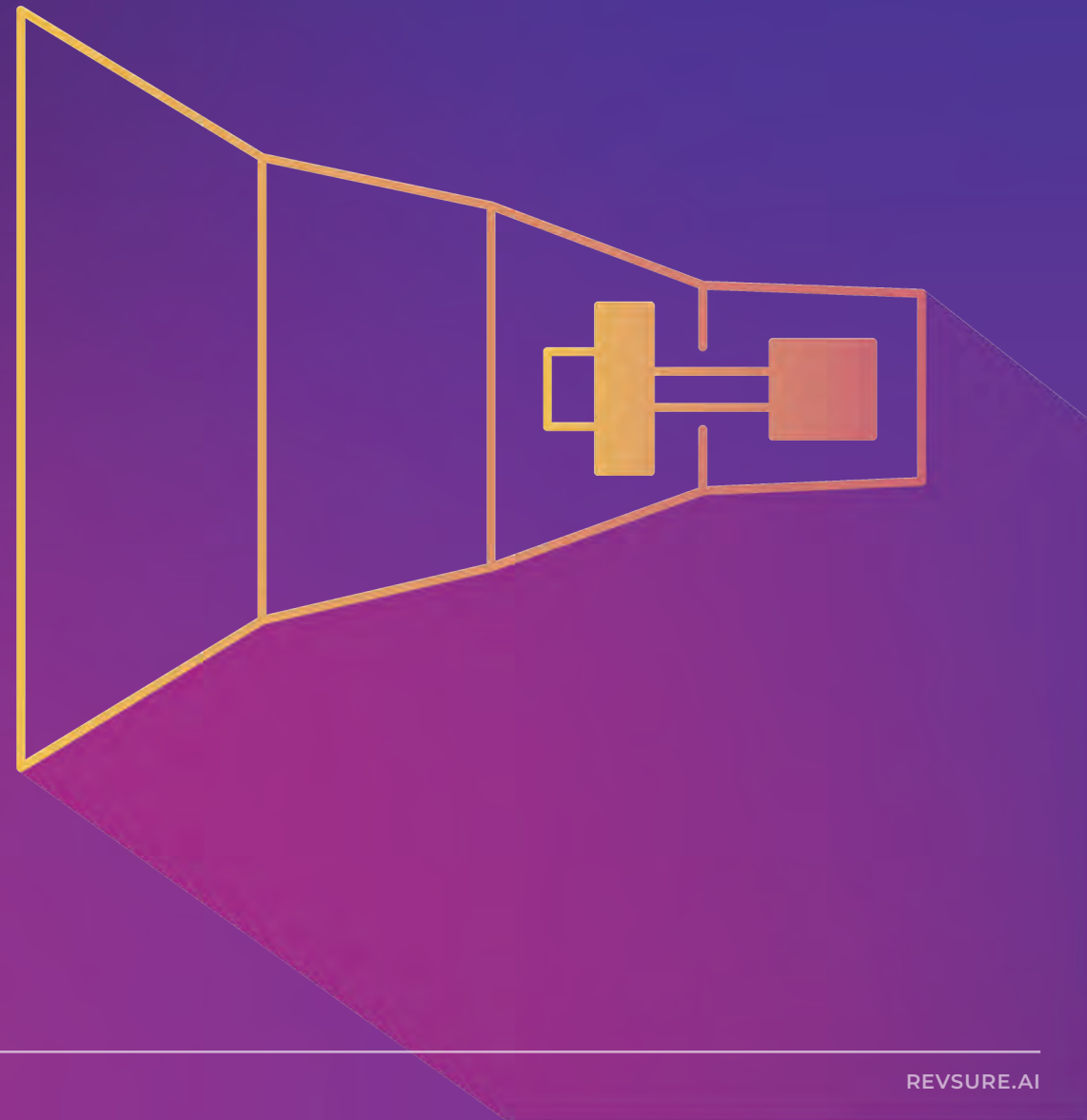
Sales Pipeline Readiness

The Predictable Pipeline
Strategy for **Marketing and
Sales Teams**

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From the
Founder & CEO

Deepinder Singh Dhingra

Founder & CEO, RevSure.AI in

2X founder with over 20 years experience in category-leading & unicorn B2B Enterprise Software and SaaS companies across Big Data Analytics, AI/ML and Planning applied to problems in sales, marketing, revenue management and operations.

"

B2B companies are struggling to drive predictable growth, which is a combination of pipeline generation and conversion. While there are revenue intelligence tools for pipeline conversion and sales forecasting, intelligence for pipeline generation has been an afterthought. **This impacts all revenue teams - Marketing, SDRs, and Sales that drive the pipeline generation journey**. An unpredictable pipeline leads to unpredictable revenue generation.

Sales Pipeline Readiness is the missing link in driving predictable & profitable revenue growth, and pipeline health needs to be on every revenue leader, CEO, and board's agenda."

Is your Pipeline a Source of Comfort or Concern?

In the recent August 2022 Pavilion Pulse Survey,

68%
of respondents disclosed that they missed their revenue targets.

57%
mentioned that their sales driven pipeline was lower than the target.

59%
confirmed that their marketing driven pipeline was lower than the target.

Generating a healthy pipeline is one of the most critical activities for predictable revenue growth. However, ask any sales, marketing, or revenue leader the above question, and one gets anxious responses.

Marketing leaders are struggling with meeting pipeline generation targets and quantifying marketing contributions to the pipeline. In contrast, sales leaders worry about having enough pipeline going into the quarter and how much time their sales teams spend scrubbing the pipeline to separate signal from the noise.

Most revenue leaders focus on metrics like pipeline coverage to feel comfortable about having enough pipeline to hit revenue targets.

Pipeline Coverage targets of 3X to 5X are not uncommon across companies depending on the product offering, industry, competitive intensity, and efficiency of the sales team to convert the pipeline into wins. Most of these targets derive from rules of thumb and calculations of aggregate historical opportunity win rates within the company and industry.

However, discerning leaders understand that it is not that simple.

The requirement for pipeline coverage is only the tip of the iceberg. It hides the complexity of pipeline generation in the modern GTM SaaS motion and its downstream impact on predictable revenue growth.

The State of Pipeline Generation

1

Leakages in the Pipeline Generation Process

"Customer information is not transferred from one function to the next. I work with the SDR team, and often I find SDRs making calls without necessarily understanding what the customer did on the website, and when the SDRs hand it over to sales, they start from scratch."

Program Manager
Revenue Operations

In the modern GTM motion of B2B SaaS, pipeline generation is usually in the no man's zone between the Sales, Marketing, and SDR teams. Each team has a role in the pipeline generation process and lifecycle. The process can vary depending on the company, but the below captures the spirit of the overall pipeline generation life cycle.

Marketing

Attracts visitors, capturing and qualifying them as marketing qualified leads

SDRs

Takes leads through sales qualification stages and eventually to qualified opportunities
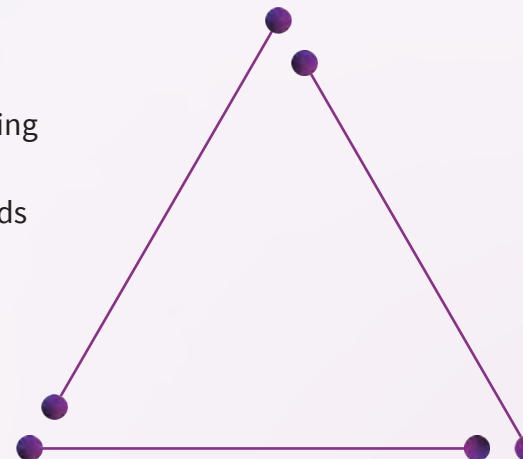
Sales

Scrubs the pipeline to separate signal from the noise

1

Leakages in the Pipeline Generation Process

Multiple hand-offs across the Marketing, Sales, and SDR teams create opportunities for friction in the overall process. Often one finds dropped leads and context leakage across the teams and stages that hinders the pipeline generation process.

Further, since multiple disparate systems exist across the Marketing, SDRs, and AE function, optimizing the customer journey towards pipeline generation becomes tougher.

1 **Marketing** attracts visitors, captures them as leads, and qualifies them as Marketing-Qualified leads.

2 **SDR** teams take these through the Sales-Accepted and Sales-Qualified stages and eventually to qualified opportunities based on the customer interactions.

3 Finally, **AEs** get involved to ensure that the opportunities are of the right profile and worth spending time on.

"As we scale - don't have a system that has the entire customer journey. Prospecting, sales, and after-sales are all different tools. That is a primary problem we are trying to solve."

Manager
RevOps

2

Pipeline Quantity ≠ Pipeline Quality

"

It's the start of a quarter. Please scrub your pipelines and ensure it reflects reality. 2 days later, the pipeline takes a 40% haircut, and you realize you don't have enough coverage. Do you have a "pipeline" or a "pipe dream"? With increasing economic uncertainty, confidence in your pipeline has never mattered more."

Barry Sowerwine
Ex-CRO & Former SVP Sales, Tableau Software

Pipeline generation is where marketing and sales come together naturally.

In many companies, pipeline generation is a team sport across deparments, each having its targets for pipeline generation. In others, marketing is responsible for, among other things, pipeline generation, while sales are focused on pipeline conversion. However, if the pipeline at the beginning of a quarter is not promising, sales cannot meet their conversion and revenue targets.

It is not just the pipeline numbers, but the quality of the pipeline that matters. Pipeline quality determines pipeline conversion effectiveness. This includes an assessment of the ICP alignment, stakeholder engagement, buyer's pain point alignment with the company's product functionality, etc.

Pipeline mix of quantity and quality impacts pipeline conversion and revenue generation. There is a problem if the opportunities are not of the right type and quality. It is common to find CMOs and CROs at loggerheads on this topic.

CROs try and make up for their lack of confidence in the Pipeline generation quality by asking for higher pipeline coverage ratios. And at the same time, CMOs question the efficiency of the sales teams in converting the pipeline.

"Most sales teams vouch that the first week of every quarter is filled with anxiety around the pipeline scrub. 30% to 40% of the pipeline can vanish within a week, risking the quarterly targets. What if there was a way to get better visibility into pipeline health (quantity and quality) well in advance?"

3

Confusion with Lead or Demand Generation

Often, pipeline generation is confused with lead or demand generation.

Gartner has done extensive research on the B2B buying journey and the sad reality is that your sales reps have roughly **5%** of a customer's time during their journey.

B2B buying journey
Illustrative
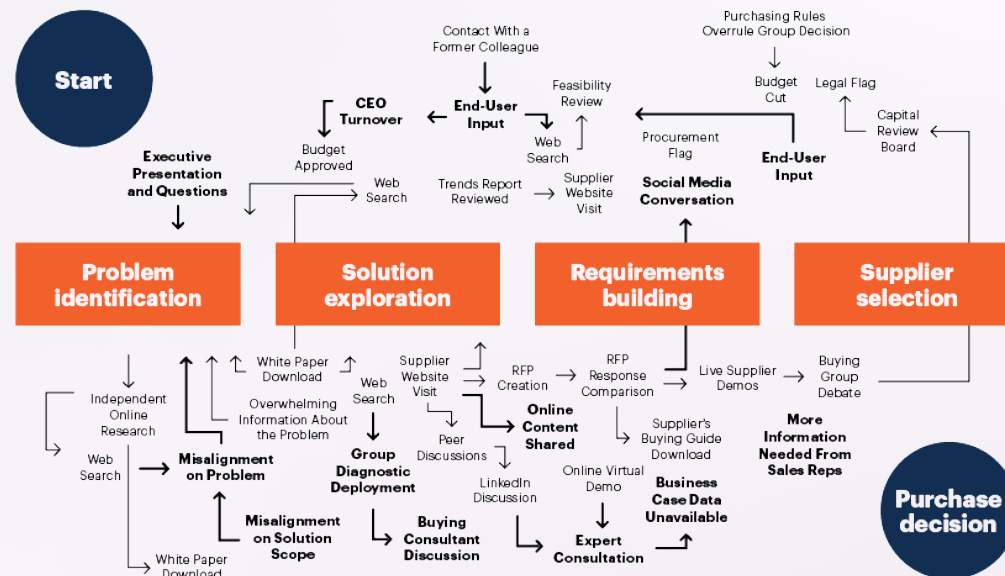
Source: Gartner
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Gartner

Just look at all of the non-linear touchpoints that occur! Finding a way to drive predictable, efficient growth from Lead-To-Opportunity by focusing on what converts will not only make your sales conversations more effective but hitting your revenue targets that much easier.

While there is an interdependence, pipeline generation requires many steps after the initial lead generation. Lead generation usually stops at leads or MQLs. However, pipeline generation requires taking the MQLs through to SQLs, and opportunity creation. Therefore, the success of pipeline generation depends on the success of many steps in the Lead-To-Opportunity journey.

How many times as marketers have we been told to **DRIVE MORE LEADS!** We can promise you that is not the answer. This implies more dollars spent on attracting new leads rather than concentrating on the crux of the problem: conversion rates. The investment in time/budget must balance lead generation with conversion rate optimization across the Lead-To-Opportunity journey.

4

Ownership of Lead-To-Opportunity Journey: Stuck in the Middle

In many companies, the ownership of Lead-To-Opportunity and pipeline generation still remains unclear.

The mix of marketing-led, sales-led, and product-led motions and the various players across Marketing, SDRs, and Sales teams gives rise to a situation where the boundaries of ownership get blurred at the interfaces.

Splitting the targets between the Marketing-generated and SDR-generated pipeline further confuses the situation, especially with multi-touch campaigns and the account-based marketing world.

> While lead generation is marketing's ownership and opportunity conversion to a customer is typical sales' ownership, the Lead-To-Opportunity conversion journey gets stuck in the middle with partial ownership across teams.

The Gap of Pipeline Generation Intelligence

A

Silos and Gaps in the Revenue Intelligence Software Landscape

The past decade has seen tremendous innovation in the SalesAl, MarketingAl, product usage, PLG intelligence, and revenue intelligence technology, yet there are gaps.

There have been many new technologies to help marketing leaders and marketing ops teams with improved lead generation, buyer intelligence, website analytics, campaign analytics, multi-touch attribution, conversion rate optimization, etc.

Sales and SDR teams have the luxury of a slate of engagement automation, Al-based playbook automation, sales enablement, sales commissions automation, conversation intelligence, buyer intelligence, deal intelligence, actionable intelligence, and forecasting intelligence tools.

Product usage and product-led-growth intelligence tools have seen a recent surge with the emergence of user-saas and product-led-growth motions.

> Gartner and Forrester now recognize Revenue Intelligence or Revenue Operations and Intelligence software as a core part of the GTM technology stack.

As the RevOps model gained steam, the category of revenue operations intelligence and revenue intelligence emerged as a collection of sales, marketing, subscription reporting, product, and customer success intelligence tools put together into one category.

A

Silos and Gaps in the Revenue Intelligence Software Landscape

On one end, several players focus on helping marketing with top-of-the-funnel intelligence (visitor to lead journey).

On the other end, several players focus on helping sales (sales sponsor) and postsales teams (opportunity to customer conversion and beyond).
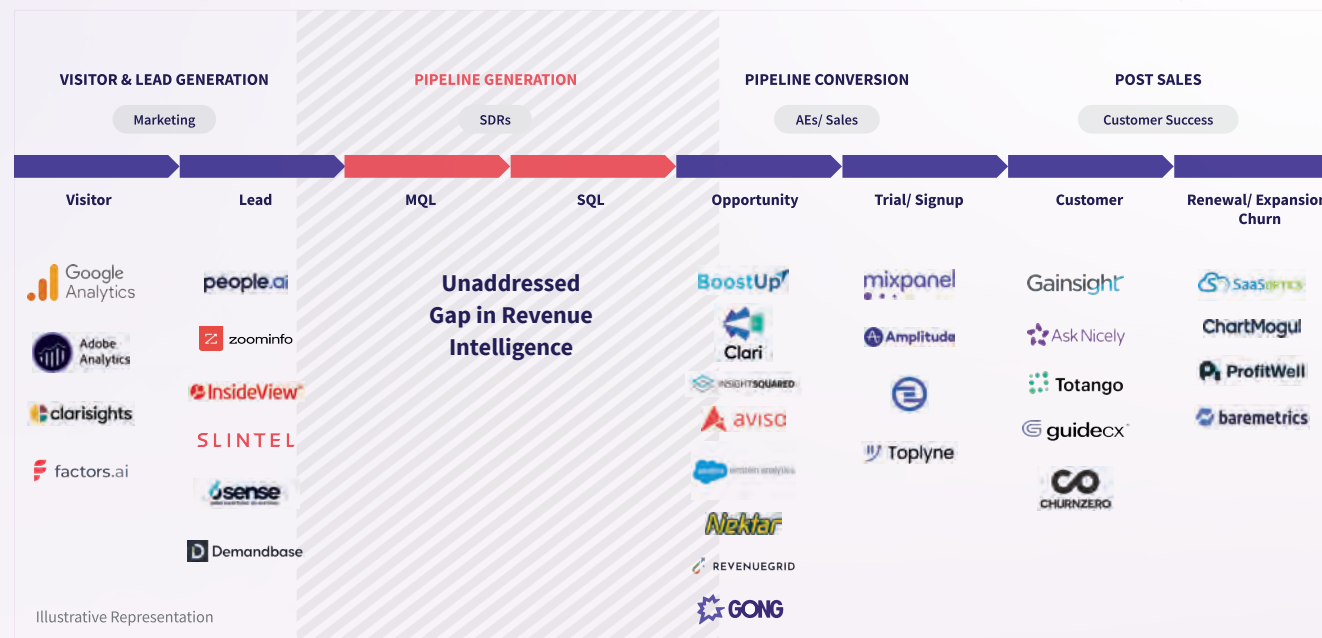
A quick overlay of the different types of players reveals a significant chasm in the market.

As one studies the landscape of revenue intelligence players closely, it becomes clear that there is a silo approach keeping in line with the silos of ownership and decision-making in B2B SaaS companies. Each revenue intelligence player addresses different aspects of the revenue funnel journey from visitor to lead to opportunity to conversion and beyond. There are maybe just a handful of players who try and look at the end-to-end revenue funnel.

As one can see this leaves a vast gap in intelligence in the lead to opportunity journey and the Lead-To-Opportunity journey is core to pipeline generation.

B

Bias for Pipeline Conversion vis-a-vis Pipeline Generation

One would expect that the emergence of the RevOps model and the CRO office would close the pipeline generation intelligence gap, since the responsibility of full revenue funnel accountability and visibility lies under the CRO's office. However, reality is far from this.

In addition to the gap in pipeline generation intelligence, **there is a bias to associate revenue intelligence more with pipeline conversion than with pipeline generation**.

Part of the reason is that the modern GTM motion is still new, people are adapting to this new way of life, and many of the GTM teams accountable for revenue grew up in the sales focused view of the world.

Many CROs and RevOps teams come from sales and sales ops backgrounds. Revenue generation targets are with the Sales team with other functions contributing but not directly accountable.

"We are sophisticated in analyzing the bottom-of-funnel and stage-by-stage progression of deals across regions, types, etc. However, pipeline conversion is not a problem. The problem is pipeline generation, and those answers are in the top and middle of the funnel which are difficult to access."

VP
RevOps

Pipeline management still focuses on looking at the bottom of the funnel - the existing pipeline of opportunities at different stages to convert into closed-won opportunities.

The words top-of-the-funnel, middle-of- the-funnel, and bottom-of-the-funnel (TOFU, MOFU, BOFU) continue to be considered **marketing** speak and not "sales speak."

Much effort goes into **analyzing** the sales pipeline, deals, and activities, with marketing activities and sales interactions being scrutinized at a micro level in terms of "getting deals done."

C

In-effectiveness of In-house Analytics and BI Initiatives in Filling the Gap

In-house efforts deteriorate into a spaghetti of clunky data integration, complex SQL queries, ad-hoc data models, and band-aid dashboarding efforts using spreadsheets, and BI tools that fail to fulfill the purpose.

Instead, they get limited to reporting aggregate and mostly outcome metrics and trends with no predictive or prescriptive intelligence.

Illustrative Representation
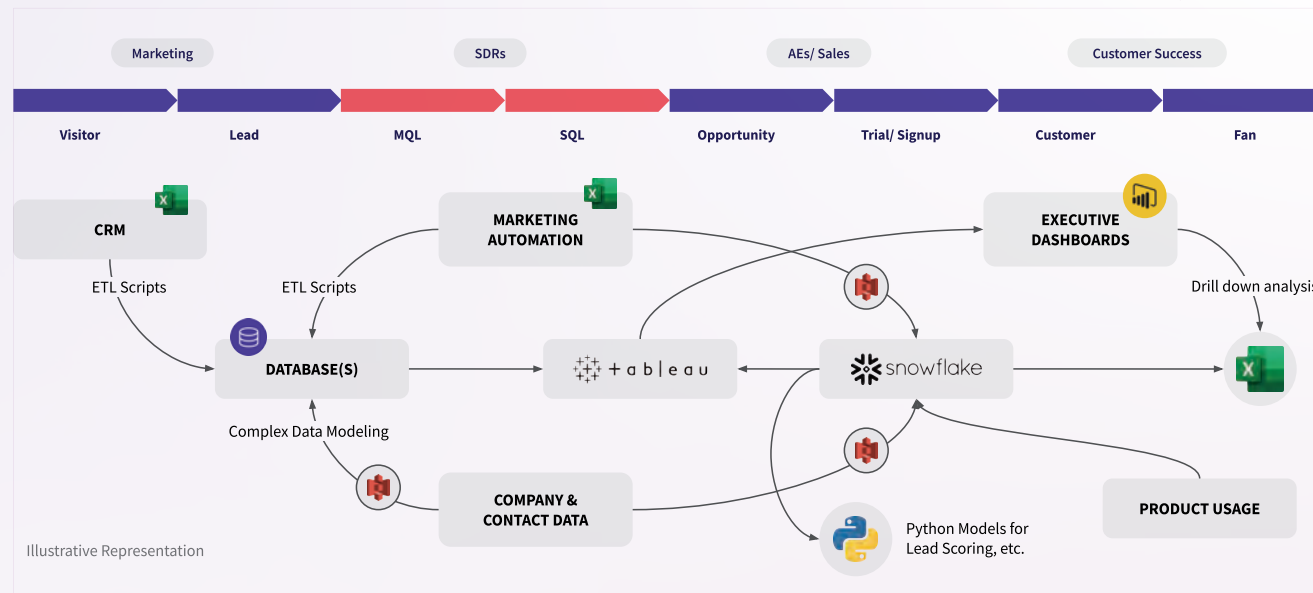
Closing the gap in pipeline generation intelligence requires stitching the data from the Marketing, SDR, and Sales motions together. This entails integrating marketing automation, CRM, and sales engagement systems into a unified data view and driving better visibility and intelligence. The skills set required to achieve this ranges from configuring data connectors to source systems to performing ETL and complex transformation logic to preparing the data before creating the needed analytics and metrics for intelligence.

These efforts require well-trained data engineers, data modelers, analytic professionals, and BI architects working very closely with sales, marketing, SDR, and RevOps teams; itself a costly proposition. **Further, generic BI tools don't cut it** since they were not built on understanding the nuances of complex GTM motions, funnel stages, cohort analysis, etc.

An Unpredictable Pipeline Leads to Unpredictable Revenue

The result of the chasm in pipeline generation and bias for pipeline conversion is a severe loss in predictive visibility of pipeline.

Many CROs and RevOps leaders still view the top and middle of the funnel as "**messy**." While admitting to the importance of the top and middle of the funnel, they cannot quantify the impact of these stages on the revenue journey and pipeline generation. And it is not surprising since one cannot quantity what one can't measure in the first place.

The loss of predictive visibility of pipeline generation has downstream effects.

Pushing predictable revenue growth requires the combination of pipeline generation and then pipeline conversion. Many people confuse sales forecasting accuracy with the predictability of revenues. That is only partially true. Sales forecasting comes after a pipeline exists as an input. The pipeline generation process starts early and is vital to generating predictable revenues.

"My problem is not the forecast for this quarter, but will we have enough pipeline going into the next quarter?"

CMO
$200M ARR Cybersecurity SaaS company

As a Founder of a $200M ARR Cybersecurity SaaS company recently shared:

"I have signed up for a pipeline creation target and would love a prediction of where I will land. Unfortunately, we have a spreadsheet that is not smart, systematic, or repeatable. Sales have a Clari for forecasting, but Marketing does not for pipeline prediction. It would be awesome if that existed for Marketing for pipeline creation."

Sales Pipeline Readiness

A
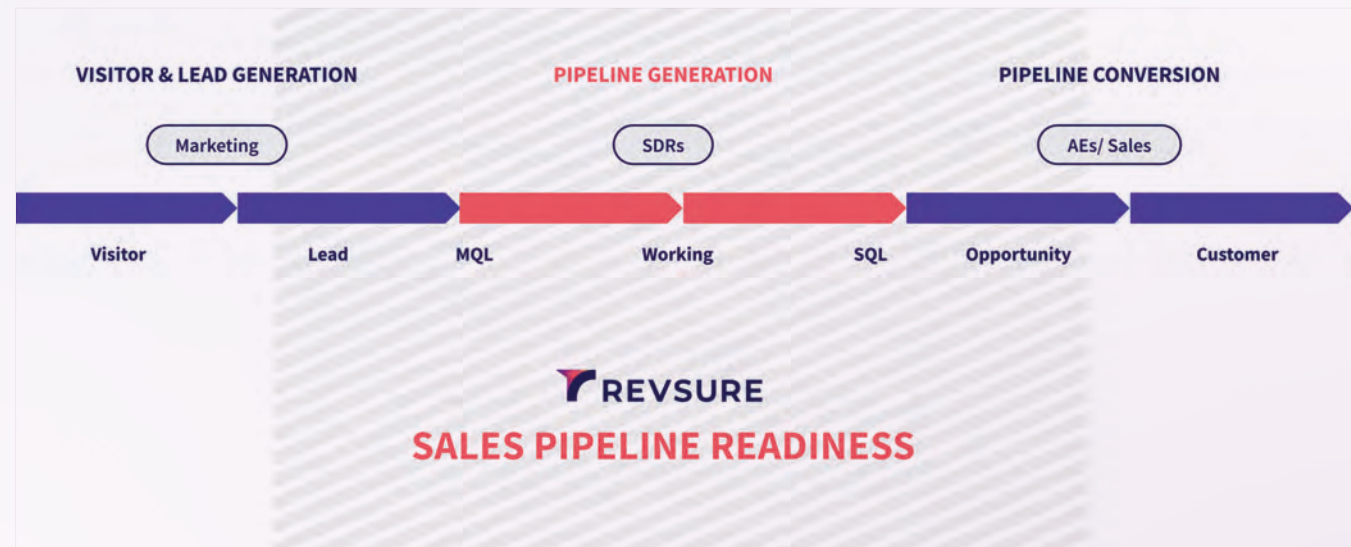
A New Approach to Accelerating Pipeline that Wins

"

"Many CROs are not focused enough on the earliest stages of the pipeline funnel. 'Pipeline is lifeline' and, therefore, top of the funnel is a critical component to inspect."

Philip Lacor
CRO, Airbase

The gap in pipeline generation and Lead-To-Opportunity journey intelligence needs a new solution to help B2B companies be more prepared to meet their pipeline generation targets and accelerate the lead to qualified opportunity journey. And that's where "**Sales Pipeline Readiness**" comes in.

Sales Pipeline Readiness is a B2B company's ability - to generate the required quantity and quality of qualified pipeline to meet its revenue conversion targets.

A

A New Approach to Accelerating Pipeline that Wins

"

Where the funnel is leaking is a critical view for any business leader. While most companies look at just the pipeline or marketing data, RevSure bridges that gap by connecting the entire funnel. That's the core differentiator because I haven't seen any other platform offer this level of capability. The breadth of information that RevSure presents and the stage-by-stage breakdowns across the entire funnel is required to resolve funnel leakages."

Mark Sladden
VP, Revenue Strategy,
Lucidworks

Sales Pipeline Readiness enables B2B companies to feel confident about their overall pipeline generation and Lead-To-Opportunity conversion process and the ability to meet their targets.

A Sales Pipeline Readiness solution addresses three core aspects:

1 Predictive visibility into pipeline generation

Track pipeline performance for current and future quarters and get AI-based recommendations to exceed goals. Instil complete revenue funnel management and intelligence that sets you up for success.

2 Unified view of the marketing funnel and sales pipeline

Pinpoint your leakages instantly and cut them early on. Effective channel performance management ensures that you make the most of your investments.

3 Lead-To-Opportunity conversion intelligence and actionable recommendations

AI-based guided pipeline readiness ensures that your sales and customer success teams drive conversions like a pro. Analyze marketing campaigns against your KPIs to identify trends and factors that impact performance.

B

Predictive Pipeline Generation Visibility

Key questions answered:

Where
is my pipeline headed and will I meet my targets?

What
is the pipeline quality in terms of win rate and velocity projections?

How ready is your pipeline?

QUARTER	SCORE	PIPELINE READINESS	PIPELINE	PROJECTION	TARGETS
Q3 (Current)	75	34% Current / 84% Projected	$4.02M (7% projected win rate)	$9.76M (11% projected win rate)	$11.72M
Q4 (Next)	62	28% Current			
Q1	24				

Opportunity List

Opportunity Name	Region	Industry	Age	Probability
Microsoft IT Storage	NAMER	IT	90 days	52%
		Finance	100 days	40%
		IT	125 days	30%

PROJECTIONS FROM FUNNEL
$9.76M

LEADS	MQLS	SALS	SQLS
$2.12M	$1.2M	$5.74M	$70.0K
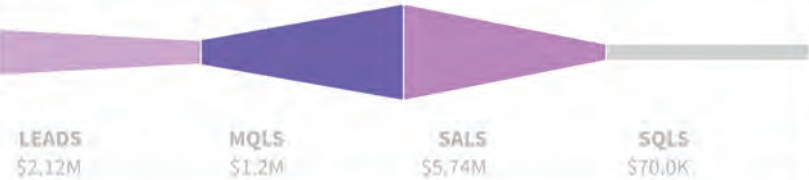
Most B2B companies get the first view of their pipeline when an SDR or AE creates an opportunity in the CRM system and assigns a $ opportunity value and an expected close date. However, that only reflects the pipeline and opportunities existing currently. It gives a current view of the pipeline but not where it is heading.

B

Predictive Pipeline Generation Visibility

Predicting where the pipeline will land requires a prediction of the pipeline based on what Leads, MQLs, and SQLs exist in the funnel. This requires looking at the Marketing funnel and the SDR motion to project the future pipeline.

Predictive visibility allows B2B companies to assess the quality and quantity of the expected pipeline for the current and future quarters against desired targets in real-time and take the required actions.

For predictive visibility to be adequate, it should include the following components:

1

Provide estimates of the win rate and conversion velocity of the pipeline, which ties into quality

2

Prediction of the $, pipeline for current and future quarters

3

Assessment of whether the company has a sufficient pipeline against the target $ and coverage requirements

"

I'm signed up for a pipeline creation target, and I would love a prediction of where I am going to land. Today there is a Clari for Sales that helps Sales leaders feel confident about committing to Sales Forecasts, but there is no Clari for Marketing to predict pipeline creation. What you are doing is a Clari for marketers."

Tom Wentworth
Chief Marketing Officer,
Recorded Future

Unified Marketing Funnel and Sales Pipeline

At every stage, **one should be able to look at the active leads/opportunities and the dynamics of newly created, moved, disqualified/dropped, etc.,** to support weekly Sales-Marketing, and Marketing-SDR interactions to identify friction points and course correct accordingly.

TOFU		MOFU			BOFU	
Visitors $5.5M +4%	Leads $3.5M +6%	MQL $2.5M -11%	SAL $1.1M +4%	SQL $790k +14%	Opportunities $300k -14%	Closed Won $200k +2%

By Value ▼ Split by ▼ + All Spend, Conversion ▼ vs Monthly Targets ▼
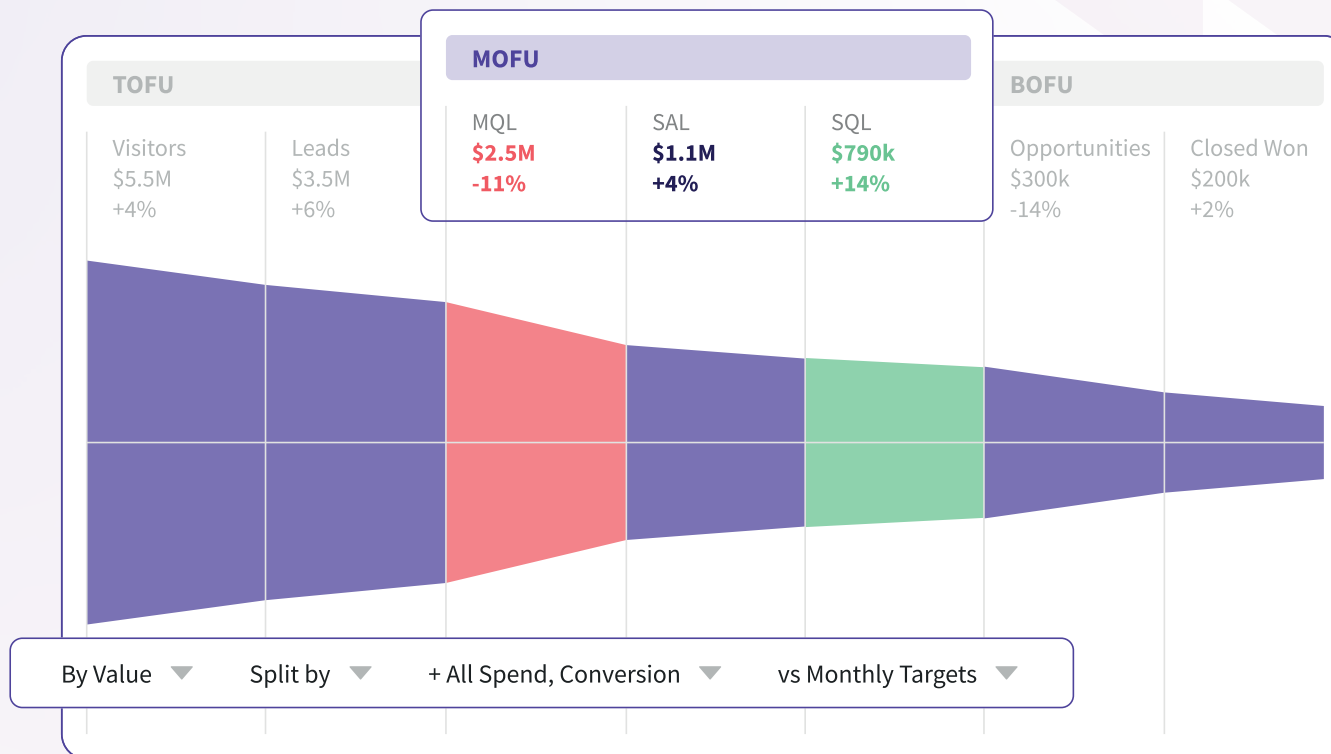
Visualizing and analyzing the dynamics of the pipeline generation life-cycle is key to plugging leakages. This requires stitching the revenue funnel data across the Marketing, SDR, and Sales motions into one unified view that can reveal the bottlenecks and leakages in the overall journey.

The unified view should trace the different stages of the revenue funnel at the most granular levels adapting to different funnel stages and GTM motions across other regions, channels, customer segments, etc.

C

Unified Marketing Funnel and Sales Pipeline

"

You address the problem of revenue productivity, which is at an all-time low. Stage-by-stage conversion is really important, and nobody has done it this way. The insights and action cards are differentiated from every tool out there. The degree of configurability is something that even Clari cannot provide."

Tom Murtaugh
VP GTM Operations,
BigID

Further, the view should allow operational monitoring of volume, value, velocity, and conversion metrics across stages, especially at the transitions of marketing to SDR and SDR to AE motions.

Key questions answered:

Where
are the leakages in pipeline generation and lead to the opportunity journey?

What
are the funnel and pipeline dynamics in terms of new, moved, disqualified, etc.?

How
are we trending against targets at different stages (volume, velocity, value, and conversion)?

Which
stages and transition points should we focus our attention on (Leads, MQLs, SQLs)?

D

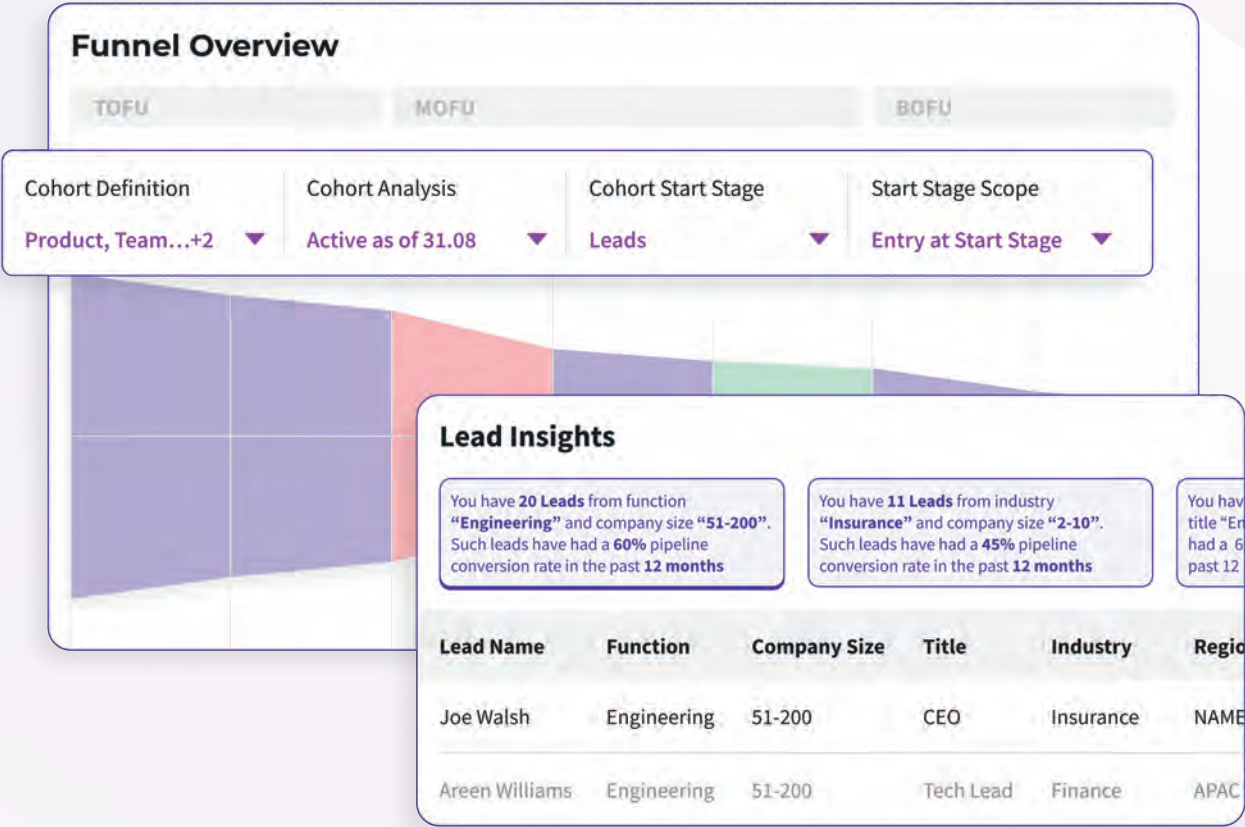# Lead-To-Opportunity Conversion Intelligence & Suggestions

Key questions answered:

Where

are the conversion bottlenecks in the lead-to-opportunity journey?

What

are the factors (attributes and activities) driving stage-by-stage conversion?

leads should be prioritized for action at each stage to maximize progress toward opportunity?

Accelerating the Lead-To-Opportunity journey requires actionable intelligence and suggestions on prioritizing leads and activities.

AI-based insights into the key factors driving conversion across different aspects (user persona, titles, region, company size, and activities) can drive daily decisions on prioritization across different stages of the journey across go-to-market motions.

> **We don't always know what some of these conversion drivers are. The catch is how much data you can ingest and what dimensions you work at. That's where the value of RevSure AI comes in.**

Mike Sitter
VP, Business Operations,
Sisense

Marketing teams can focus on the most promising leads from a lead nurturing campaign perspective. In addition, Al-based insights can help refine ICP based on actual conversion behavior as it evolves. It can also reveal new segments of customers that are more promising than others and differences in approach to be taken across regions, channels, and customer segments.

SDR teams can work on reaching out to the most promising MQLs rather than doing a spray and pray approach.

Drive Confident and Profitable Growth with Sales Pipeline Readiness

Re-capture Lost Opportunity

"A simple back-of-the-envelope calculation reveals that a 5% increase in Lead-To-Opportunity conversion drives a direct 5% improvement in new bookings growth, and when combined with a 5% improvement in quality of the pipeline compounds to a **10% -15%** increase in new bookings growth."

In a slowdown, as the mantra of growth at all costs gives way to profitable revenue growth, companies must focus on driving better efficiencies across their revenue funnel and improving conversions at each stage.

Sales Pipeline Readiness helps companies accelerate pipeline generation without incremental sales or marketing investment. It maximizes the resources cross Marketing, SDR, and Sales teams and the already invested dollars in demand and lead generation.

With Sales Pipeline Readiness, not only can B2B companies drive predictable revenue growth but do it profitably.

REVSURE

Create a Pipeline that Matters

Explore how you can **restore confidence** in your **Pipeline** and **Revenue Generation** efforts with **Sales Pipeline Readiness** now.

Get in **touch**