

Salesloft.

The Blueprint
for **Revenue
Orchestration**

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It's time to reign in revenue operations complexity



“In an age of distraction, nothing can feel more luxurious than paying attention. And in an age of constant movement, nothing is more urgent than sitting still.”

Author Pico Iyer is onto something here. Those of us on go-to-market teams are craving simplicity in all the chaos.

B2B sales has become wildly complicated in recent years thanks to several well-documented trends:

- 1 Buyers are deep in the purchase journey before they're ready to talk to your team.
- 2 Buying committees have ballooned to an average of nine people, which has slowed sales cycles.
- 3 Communications during the sales cycle are all over the place; buyers will engage on up to ten channels—email, online chat, phone, etc.

Sellers need connected data, insights, and workflows to navigate this selling landscape, and sales tech stacks have swelled in an attempt to meet this need. For years, GTM teams have cobbled together call recording, email sending, forecasting, account management, CRM, and more systems. Reps use an average of 10 tools to close a deal, so creating a cohesive customer experience is next to impossible. Revenue organizations must face the reality that hiring more reps or acquiring more technology isn't the solution. Businesses need efficient growth and durable revenue—and that calls for efficient revenue operations.

But efficient revenue operations built on consistent, repeatable, and predictable processes have always been just out of reach.

Until now.



Buyers expect reps to meet them where they are. 80% of customers say the experience a company provides is as important as its products or services.

Chapter 1

Meet the Revenue Orchestration Platform: Your ticket to revenue team efficiency and next-level buyer experience



The word “orchestration” is no accident. Imagine your business as a grand orchestra, with each team playing a vital role in the symphony of revenue generation. Revenue orchestration is the maestro that harmonizes these efforts, ensuring that Sales, Marketing, and Customer Success work together to create an exceptional customer experience. Technology is essential to making it all work.

At its core, a Revenue Orchestration Platform is the central nervous system of revenue generation. Imagine taking all the loosely connected tech across the entire buyer and seller journey and combining it into a unified powerhouse.

A Revenue Orchestration Platform puts buyer engagement, sales engagement, conversational intelligence, and revenue intelligence in one platform, leading to:

- Better seller and buyer experiences
- Less administrative burden
- More effective and repeatable sales processes
- Consistent and predictable outcomes

Anatomy of the ideal Revenue Orchestration Platform

Orchestrated workflows for the whole revenue team and customer lifecycle				
Buyer engagement	Sales engagement	Conversation intelligence	Revenue intelligence	Customer Engagement
Automatically identifies and understands web visitors with tools like AI-powered chatbots and conversational landing pages; presents visitors with hyper-personalized web experiences and surfaces buyer intent signals directly into sales workflows; connects marketing/digital interactions to the opportunity lifecycle.	Automates and optimizes sales interactions and communications with prospects and customers across multiple channels to deliver high-quality engagement at scale; helps sales teams increase efficiency and improve conversion rates by streamlining workflows and providing activity and performance metrics.	Transcribes and analyzes sales conversations, identifying key topics, sentiments, and patterns to help sellers efficiently prep for meetings with buyers and help sales managers identify targeted feedback for their reps.	Aggregates and analyzes data from various sources across the revenue cycle to provide real-time insights into sales performance, customer behavior, and market trends; lets you forecast more accurately, get ahead of deal risks, and make data-driven decisions to optimize revenue strategies.	Boosts adoption, retention, and expansion by automating personalized follow-ups and providing visibility into key performance indicators; orchestrates proactive action based on real-time customer signals and works with CRM systems to keep a complete view of customer interactions and health.
AI	Uncovers insights, prioritizes action, generates content, and automates manual tasks to improve efficiency and effectiveness across all pillars.			
Holistic data model	Provides a complete view of your revenue machine (each of the four pillars above)—directly in your day-to-day workflow; captures all buyer signals and seller interactions through integrations, CRM account and opportunity data, and historical business performance such as win/loss patterns and deal progression to guide sellers' actions in a coordinated way.			

As Forrester analysts Anthony McPartlin and Seth Marrs explain, “ROPs enable B2B organizations to orchestrate and maximize commercial performance from their revenue motions, including new logo acquisition as well as renewal and expansion motions for existing customer relationships. They allow individual sellers to orchestrate their own engagement while providing leadership and operations with insight on how to effectively orchestrate teams and the underlying processes supporting engagement and revenue management.”

And that’s not all.

Chapter 2

How a Revenue Orchestration Platform helps you tackle today's complex selling environment



Gartner found that 77% of sellers struggle to complete assigned tasks efficiently. Attempts to make sales data-driven have left many sellers drowning in disconnected data across multiple tools and dashboards, with no insights or clarity on next best actions. A Revenue Orchestration Platform solves this by providing one place for reps to execute and manage all their selling activities.

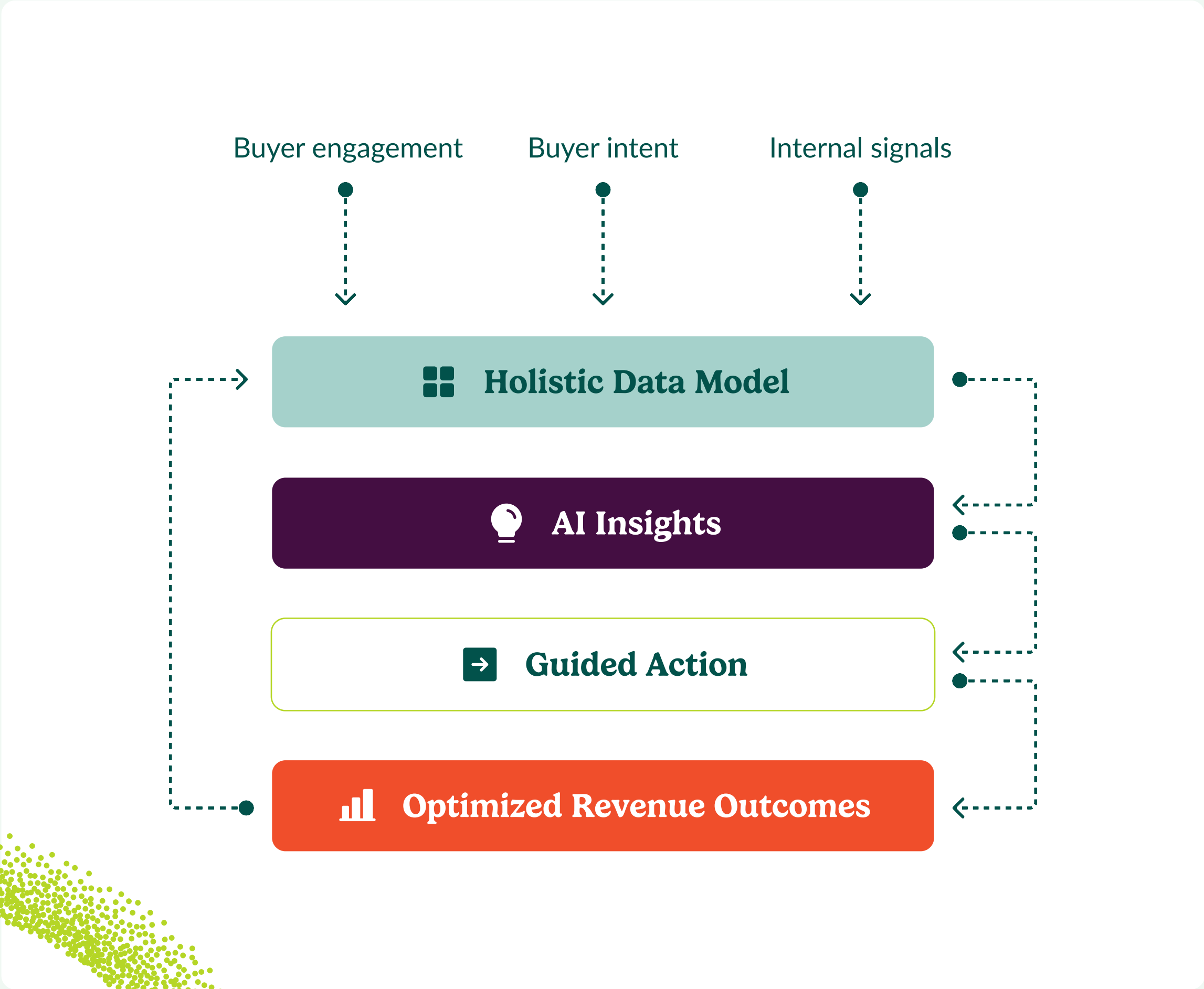
You can pull all the information sellers need into the platform through pre-built integrations with your CRM and your broader go-to-market stack. With an open API, you can even bring in proprietary data and signals that are unique to your business, product, and sales process. For example, an account manager could be alerted to a customer reaching license capacity, triggering an action to reach out about upgrading their plan.

AI synthesizes and analyzes the data from the millions of buyer and seller interactions, activities, and outcomes captured in those systems and prioritizes next best actions directly in the workflow. It equips your reps with one workflow with all the capabilities they need to execute on the most important insights and actions, highlighting:

- Who is in market now
- What the highest value actions are
- When to take those actions
- And, WHY these actions are so important to take

That’s the magic of a Revenue Orchestration Platform — AI’s ability to take a holistic view of a buyer’s omnichannel experience and turn insights into action. Buyer signals and revenue performance insights lead to seller actions and outcomes; in turn, those outcomes are fed back in to help fine-tune your revenue process. The Revenue Orchestration Platform creates a flywheel effect across the buyer and seller journey.

Since everything is in one place and syncs back to your CRM, you’ll never have to wonder if the data is reliable. Whether you’re a manager looking to optimize your team’s processes or a rep trying to understand your customer, a Revenue Orchestration Platform makes it easy to get the whole story. It’s laid out for you in a single source of truth.



Chapter 3

Every GTM role benefits from a Revenue Orchestration Platform

Orchestrating your entire revenue motion with **one interface** vastly reduces complexity in people and technical processes. Consistent, repeatable, and actionable workflows powered by AI and automation make a difference to everyone on your GTM team:

- **Sellers** can work in one place with all the context they need to stay focused. With AI to guide them through complex buyer journeys, they know exactly what action to take, when, and why, leading to higher productivity and more deals won.
- **Sales managers** get the insights they need to accurately forecast pipeline, quickly identify coachable moments for team members with tools like AI-assisted call scoring, spot deal risks before it's too late, and coach every seller to be as good as their top performer.
- **Customer Success managers** can grow relationships by delivering consistent, high-quality engagement throughout the customer lifecycle. They can get context on account activity, see signals on product usage, and drive adoption and renewal plays.
- **Marketers** can create adaptive and individualized buyer experiences. They can even feed buyer intent signals right into the sales teams' workflows for action and conversion—a big win since, too often, valuable leads are lost in spreadsheets or tools salespeople never log in to.
- **RevOps leaders** can attribute, prioritize, and optimize processes more efficiently and confidently, delivering big jumps in efficiency and productivity across teams.
- **CROs/CSOs** can understand key revenue performance trends at a glance across different business units so they can catch risks early, hit financial targets, and effectively plan for future growth. They can also build more durable revenue through repeatable sales motions and codifying best practices into user workflows. Bonus: It's easy to provide board-level insights at any moment.



Plus, now that your GTM team shares a single source of truth for both buyer engagement and revenue performance, everyone can better align within and across teams to focus on creating seamless customer experiences and achieving shared revenue goals.

What to consider when purchasing a Revenue Orchestration Platform



When choosing a Revenue Orchestration Platform, you’ll need to make sure it meets your organization's diverse needs. It should enhance the buyer and seller experience, streamline operations, and drive measurable business results.

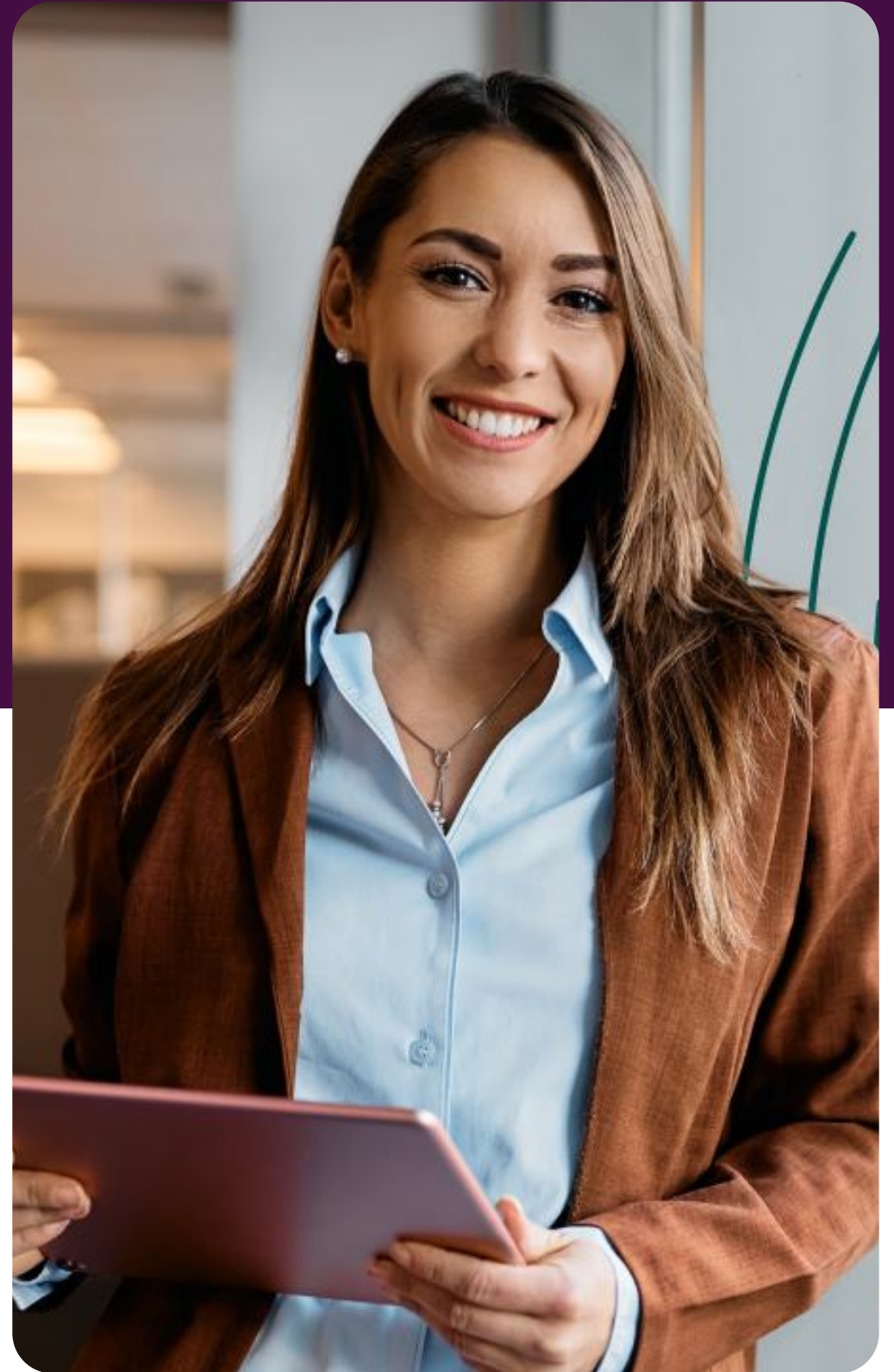
Security and compliance that match your company’s needs are also essential. This checklist will help you evaluate potential Revenue Orchestration Platforms to see if they align with your goals and your team’s requirements.

Consideration	Key Questions	How to Evaluate
Unified Buyer Experience	Does the platform create a unified buyer experience? How?	Look for features that integrate all buyer touchpoints to ensure consistent messaging and interactions across channels.
Unified Seller Experience	Does the platform create a unified seller experience? Can sellers work with your existing tools through the platform interface? How much “swivel-chairing” will sellers still need to do?	Ensure the platform integrates smoothly with your current tech stack —and brings the needed context directly into workflows— reducing the need to switch between systems. A unified interface should allow sellers to operate efficiently in one place.
Breadth of Signals	What signals does it collect around contacts, accounts, the buying group, and opportunities? Does it provide a holistic view?	Check if the platform gathers data from various sources to offer a comprehensive view of buyer behaviors and preferences, including signals from marketing and sales.

Consideration	Key Questions	How to Evaluate
Actionable Insights	How does it transform signals into recommended actions for your sales team?	Confirm that the platform uses AI and machine learning to convert raw data into useful insights and prioritized next best actions so sellers can effectively engage buyers.
Business Results	Is the data model trained on revenue outcomes? Exactly how will it help drive tangible outcomes?	Look for proof of the platform's impact on metrics like conversion rates, sales cycle time, and revenue growth through customer case studies. Evaluative analyst reports like Forrester Waves and Total Economic Impact studies are a great place to start.
Marketing Alignment	Can it capture marketing signals as well as sales signals?	Ensure the platform can integrate and analyze both marketing and sales data to provide a complete picture of the buyer's journey and improve team coordination.
Integration Potential	Does it have the prebuilt integrations you want? Is it an open platform that connects with other tools (open API)?	Check for prebuilt integrations with your existing tools. Also, check whether the platform offers an open API for easy connectivity with other software, including your proprietary systems.
AI Efficiency and Effectiveness	Is AI integrated in a way that creates efficiency and makes your people more effective?	Evaluate how the platform uses AI to automate routine tasks, prioritize actions, and generate content, boosting team efficiency and effectiveness. Don't fall for flashy features; make sure that AI is "right-sized" and fit for practice use cases to ensure adoption and the highest impact.
Governance, Security, and Compliance	Does it meet enterprise governance, security, and compliance requirements?	Ensure the platform complies with industry standards and company requirements for data security and privacy to protect sensitive information and maintain compliance. Look for flexibility in provisioning, managing access and customizing the platform to fit your business operations structure.

Ready for Revenue Orchestration?

Salesloft helps revenue teams take the right actions to close every deal with the only platform built around the sellers' workflow. The Salesloft Revenue Orchestration Platform aligns revenue teams so they can prioritize and execute all their actions to improve buyer and customer engagement throughout the entire buyer journey, driving improved productivity, and better pipeline efficiency and revenue outcomes. Thousands of the world's top revenue teams, like those at Google, 3M, IBM, Shopify, Square, and Cisco, drive more revenue with Salesloft.



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