Revenue Operations Checklist

If you want this...	...so you can..	...talk to your CSM about
Account enrichment & creation	Increase data accuracy	❑ No account creation from Outreach
Contact discovery & creation	Supercharge outbound efforts	❑ No lead creation from Outreach ❑ Duplicate resolution best practices ❑ Sourcing leads from the web with extension ❑ Integrations with DiscoverOrg, Zoominfo, etc.
SFDC // Outreach coordination & automation	Build flying cars	❑ Engagement panel fields in SFDC ❑ Custom field mapping ❑ Persona automation
Protection of selling time & process	Decrease non-selling time	❑ User permission settings on sequences/templates ❑ Advanced template variables ❑ Sequencing triggers

Prospector's Checklist

If you want this...	...so you can...	...talk to your CSM about
Humanize data firehose	Increase personalization at scale	❑ Extension use case for batched/one-off researching ❑ Personal note fields (template ready) ❑ Manual email steps (mix of custom/templated verbiage) ❑ Generic task steps to operationalize research
Execute the process	Have reps comply to best practices	❑ 360 View + **Task priority** + Task sorting + Task Flow combo ❑ Analytics
Maintain data accuracy	Clean up SFDC	❑ Specific field mapping to SFDC ❑ "Update Out" to SFDC ❑ Bulk edit ❑ Email/phone number validation
Manage initial meeting/opp creation	Hold more meetings	❑ Triggering sequences based on meeting status in SFDC ❑ Sequences to make sure meeting holds and to reschedule

Closer Checklist

If you want this...	...so you can...	...talk to your CSM about
Advanced prospecting	Run account-based motions like a boss	❏ SmartViews ❏ Advanced filtering ❏ High engagement custom field automation
Opportunity next step	Increase win rates	❏ One-off next step tasks ❏ Intelligence tiles layout geared to the AE ❏ Analytics
Perfect follow-up	Decrease sales cycles	❏ Follow-up sequences ❏ Gmail experience (Outlook coming soon!)
Handoff management	Improve customer experience	❏ Handoff sequences ❏ “Sending as” another user

Keeper Checklist

If you want this...	...so you can...	...talk to your CSM about
Pre-sales pilot user management	Convert pilots better	❏ Account-based tasks and tags ❏ Account notes
Post-sales customer user management	Better onboarding	❏ Send later
Renewal communication	Increased retention	❏ **Manual first steps to take into account current status of account** ❏ {{! Comment goes here}} variable
Referral generation	Create more pipeline	❏ Assigning a task to another user