

Sales Operations Playbook: From First Contact to Cash

A stage-by-stage guide to how a Sales Operations team works, the enterprise tools behind each stage, the BI and reporting layer, and the cash collection toolkit.



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Playbook at a glance

Stage	Phase	Led by	Core system	Headline metric
1. Identify accounts	Find the customer	Sales Ops, Sales leadership	CRM, data providers	Pipeline from target accounts
2. Lead management	Find the customer	Marketing Ops, Sales Ops	Marketing automation, CRM	Speed to lead
3. Pipeline and forecast	Win the deal	Sales managers, Sales Ops	CRM, forecasting tools	Forecast accuracy
4. Quote and deal desk	Win the deal	Deal desk, Finance	CPQ	Quote turnaround time
5. Contract	Win the deal	Contracts, Legal	CLM, e-signature	Contract cycle time
6. Order booking	Order to cash	Order Management	ERP, order management	First-pass yield
7. Invoice and revenue	Order to cash	Billing, Revenue Accounting	Billing, revenue tools	Invoice accuracy
8. Collections	Order to cash	Collections, AR	AR platform, payment gateway	Days sales outstanding
9. Customer success	Keep and grow	Customer Success	CS platform, support tools	Time to value
10. Renewals	Keep and grow	Renewals, Customer Success	CRM, CPQ, billing	Net revenue retention

How to use this playbook

Sales Operations (Sales Ops) makes the revenue engine run predictably. Sales people sell. Sales Ops builds the system around them: who they sell to, how deals are tracked, how prices and contracts are approved, how orders are booked and billed, how cash comes in, and how customers renew. It sits between Sales, Marketing, Finance, Legal and Customer Success, and most of its value comes from keeping the handoffs between those teams clean.

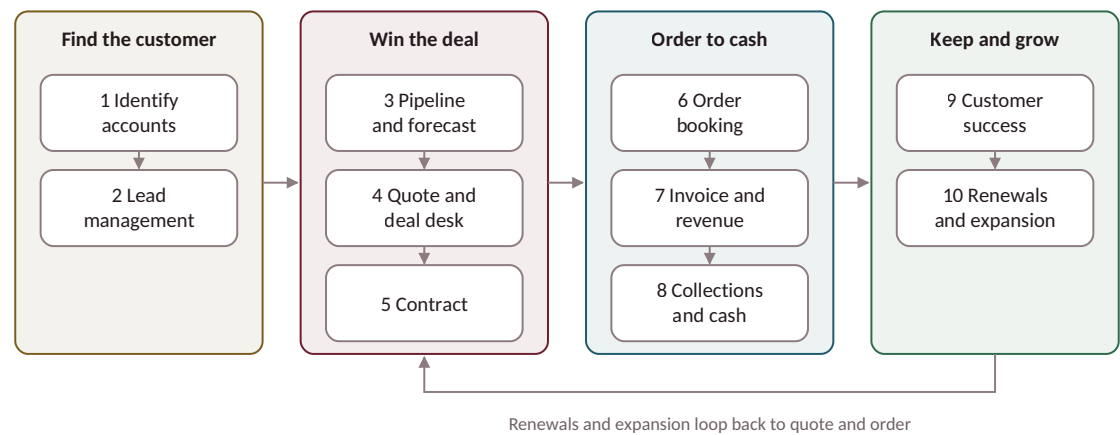
The lifecycle is split into ten stages in four phases:

- **Find the customer:** 1. Market and account identification, 2. Lead management
- **Win the deal:** 3. Opportunity management and forecasting, 4. Quote and deal desk, 5. Contracting
- **Order to cash:** 6. Order booking and management, 7. Fulfilment, invoicing and revenue recognition, 8. Collections and cash application
- **Keep and grow:** 9. Customer success and onboarding, 10. Renewals and expansion

Every stage below follows the same pattern: the purpose, what actually happens, who does it, the systems used, the data that must be right, the numbers that measure it, and the mistakes that cost money. The later sections cover the tool landscape, BI, collection tooling, integration, roles and topics beginners often miss.

A note on tools: vendors merge, rename and retire products often. Names here are examples of each category, not recommendations. Check current product names and pricing before you evaluate any of them.

Ten stages in four phases take one customer from first contact to renewal



Read the map left to right. Each phase hands work to a different team, and renewals feed back into quoting and order booking.

Stage 1: Market and account identification

Purpose

Decide which companies deserve sales effort, how many people you need to cover them, and what each person is expected to deliver. A good decision here prevents months of wasted selling later.

What happens

Define the ideal customer profile (ICP). The ICP describes the company type that buys, succeeds and renews. It usually combines:

- **Firmographics:** industry, annual revenue, employee count, geography, ownership.
- **Technographics:** the software and infrastructure they already use.
- **Behavioural signals:** hiring patterns, funding, leadership changes, web visits, content downloads, product usage.
- **Pain and use case:** the specific problem your product solves for them.
- **Buying committee:** the roles involved, for example economic buyer, champion, technical evaluator, procurement and legal.

Build the ICP from your best existing customers: look at who has the highest retention, fastest sales cycle and largest expansion, then look for shared traits.

Size the market. Teams often use TAM (total addressable market), SAM (the serviceable part you can actually reach) and SOM (the share you can realistically win in a period). These figures set revenue targets and hiring plans.

Score and tier accounts. Combine a fit score (how closely the account matches the ICP) with an engagement score (how much they are interacting with you). Tier A accounts get named reps and account plans, tier B gets standard coverage, and tier C gets low-touch or digital coverage.

Design territories. Common models are geographic, vertical (industry), named-account, or a hybrid. Good territories are balanced on potential revenue, not just on the number of accounts. Include a parent and child account hierarchy so global customers are not split across reps by accident.

Plan capacity and set quotas. Capacity planning asks how many fully ramped reps you need: required bookings divided by the realistic productivity of one rep, adjusted for ramp time and attrition. Quotas are set top-down (company target divided across teams), bottom-up (based on territory potential), or a blend. Check that the sum of rep quotas is higher than the company target, since not everyone will hit quota. This buffer is often called quota over-assignment.

Write account plans for tier A. An account plan lists the stakeholders, the business goals, the products to sell, the competition, the risks and a dated action plan.

Who does it

Sales Ops leads with Sales leadership, Finance (for targets and capacity) and Marketing (for ICP and segmentation).

Systems

- **CRM:** the account and territory data (Salesforce, Microsoft Dynamics 365, HubSpot).
- **Data providers and enrichment:** ZoomInfo, Dun & Bradstreet, Apollo, LinkedIn Sales Navigator, Clearbit-style enrichment.
- **Territory and planning tools:** Salesforce territory management and maps, Anaplan, Fullcast, Varicent, and spreadsheet models.

- **BI tools:** to analyse historical win rate and revenue by segment.

Data that must be right

Account hierarchy, industry and size, billing and shipping country, a unique company identifier (such as a D-U-N-S number), the owner, and the territory assignment.

Metrics

Share of pipeline from target accounts, territory potential variance between reps, quota attainment distribution (a healthy team has most reps near quota, not a few reps carrying everyone), and rep ramp time.

Common mistakes

- Setting territories once a year and not adjusting when reps leave.
- Splitting quotas evenly although territory potential is very uneven.
- Using an ICP based on opinion, not on retention and expansion data.
- Duplicate accounts that hide who really owns a customer.

Good practices

Write down territory rules, including how long a rep protects an account and how conflicts are resolved. Review territories every half year. Measure fairness with data, not feelings.

Stage 2: Lead management

Purpose

Turn interest into a qualified conversation and make sure the right rep follows up quickly.

What happens

Capture. Leads arrive from several sources: inbound (web forms, content, webinars, events), outbound (sales development reps running sequences), partner referrals, and product-led signals (a free-trial user showing buying behaviour, sometimes called a product-qualified lead).

Clean and enrich. Remove duplicates, standardise fields (country, state, job title), and fill gaps from data providers. Poor data here causes routing errors for the rest of the lifecycle.

Respect consent. Record how and when a person agreed to be contacted. Privacy laws such as GDPR in Europe and India's Digital Personal Data Protection Act place rules on collecting and using personal data, so Marketing and Sales Ops should keep consent fields and honour opt-outs.

Score. Lead scoring combines fit (title, company size, industry) and behaviour (pricing page visits, demo requests, email clicks). A threshold moves the lead through the lifecycle:

- Lead, then Marketing Qualified Lead (MQL), then Sales Accepted Lead (SAL), then Sales Qualified Lead (SQL), then Opportunity.

Route. Match the lead to an existing account (lead-to-account matching), then assign by territory, named account, or round robin. Set a response-time agreement (SLA): for example, hot leads contacted within minutes and others within a business day. Add reassignment rules when the SLA is missed.

Qualify. Use a framework so reps ask the same questions every time. BANT (budget, authority, need, timeline) is simple. MEDDIC (metrics, economic buyer, decision criteria, decision process, identify pain, champion, competition) suits larger deals. Pick one and make its fields mandatory at the right stage.

Hand off. The marketing-to-sales handoff is a written agreement: what makes a lead acceptable, how fast Sales responds, and what happens to rejected leads (they go back to nurture with a reason code).

Who does it

Marketing Operations and Sales Ops share ownership. Sales development reps work the leads.

Systems

- **Marketing automation:** HubSpot, Marketo, Salesforce Account Engagement (Pardot), Eloqua.
- **Routing and scheduling:** LeanData, Chili Piper, native CRM assignment rules.
- **Sales engagement:** Outreach, Salesloft, Apollo.
- **CRM:** the system of record for leads, contacts and accounts.

Metrics

Speed to lead, lead-to-opportunity conversion by source, SLA hit rate, cost per qualified opportunity, and rejection reasons.

Common mistakes

- Routing rules with gaps, so some leads have no owner.
- Scoring models never checked against actual wins.
- No feedback loop: Sales rejects leads without telling Marketing why.
- Counting activity (calls made) as success instead of qualified pipeline.

Stage 3: Opportunity management and forecasting

Purpose

Give everyone one shared picture of every deal and a forecast leaders can trust.

What happens

Design the opportunity record. The core fields are amount, close date, stage, forecast category, next step, type (new business, expansion or renewal), lead source, competitor, products, and contact roles. Fewer mandatory fields are better, as long as the critical ones are always filled.

Define stages with exit criteria. Each stage should end with something the buyer did, not what the rep feels. An example structure:

1. Qualify: pain and sponsor confirmed.
2. Discover: stakeholders and decision process mapped.
3. Solution: demo or proof of value completed.
4. Propose: pricing shared and reviewed with the buyer.
5. Negotiate: terms under discussion with legal and procurement.
6. Commit: verbal agreement and signature path agreed.
7. Closed won or closed lost, with a mandatory reason.

Inspect the pipeline. Weekly manager reviews look at stage aging (deals stuck longer than normal), close dates that keep moving, deals with only one contact (single-threaded), missing next steps, and gaps in qualification fields. Sales Ops builds the reports and dashboards so managers spend time coaching, not hunting for data.

Measure pipeline health.

- Coverage: open pipeline divided by remaining quota, usually 3x to 4x for new business.
- Velocity: (number of opportunities x average deal size x win rate) divided by sales cycle length in days. It shows the revenue flowing per day and which lever helps most.
- Conversion: the percentage moving from each stage to the next.

Forecast. Common categories are pipeline, best case, commit and closed. Common methods:

- Rep and manager call: people judge each deal. Simple but biased.
- Weighted pipeline: each stage carries a probability.
- Historical or stage-based: uses past conversion rates.
- Predictive: models use deal activity and past patterns.

Most teams combine a human call with a statistical view and compare the two. Take regular snapshots of the forecast so you can later measure accuracy and bias (consistently high or low).

Who does it

Reps update deals, front-line managers inspect and forecast, and Sales Ops owns the process, definitions, dashboards and the roll-up. Finance reviews the forecast and compares it with the plan.

Systems

- **CRM:** Salesforce, Dynamics 365, HubSpot.
- **Forecasting and revenue intelligence:** Clari, Aviso, BoostUp, Gong.
- **Conversation intelligence:** Gong and similar tools record and analyse calls to show whether stage criteria are true.
- **BI:** Tableau, Power BI, Looker for custom analysis.

Metrics

Forecast accuracy, forecast bias, win rate by segment, average sales cycle, pipeline coverage, stage conversion, and slipped-deal rate.

Common mistakes

- Stage names that mean different things to different teams.
- Forecasting based on hope: commit deals with no meeting scheduled.
- Fixing the forecast number instead of fixing the process that produced it.
- Too many fields, so reps stop filling the CRM.

Stage 4: Quote and deal desk

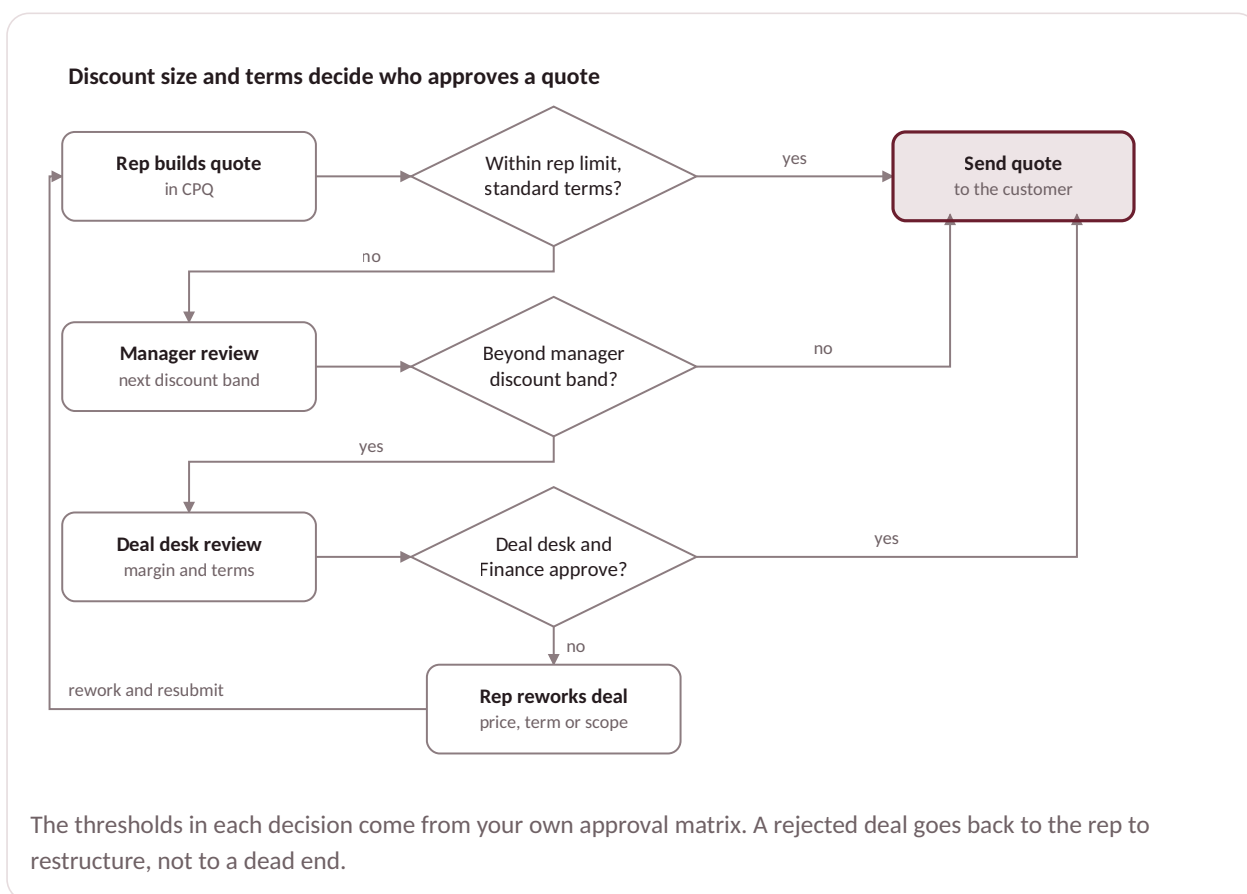
Purpose

Produce a price and a set of terms that are correct, profitable and approved before the customer sees them.

What happens

Price architecture. Sales Ops and Finance maintain price books: list prices by product, region and currency, volume tiers, bundles, and rules for subscription, usage-based and one-time charges. Complex deals often include ramped pricing (lower in year one, higher later), multi-year terms, co-terming (aligning a new purchase to an existing contract end date) and prepayment.

Discount governance. An approval matrix routes quotes by risk. An illustrative example: reps may discount a small amount on their own, managers approve the next band, directors or Finance approve larger discounts, and anything below a set margin needs executive approval. Non-price terms, such as long payment terms, price caps, termination rights and unusual liability, get routed too.



Deal desk. Deal desk is a team that structures non-standard deals and removes friction from approvals. It reviews margin, contract terms and revenue recognition impact, suggests alternatives (such as a multi-year commitment in return for a lower rate), and tracks exceptions so the company learns which concessions actually win deals.

Configure, price, quote (CPQ). CPQ software holds the product catalogue and the rules for what can be sold together, calculates price, produces the quote document, and sends it through approval workflows. The best CPQ setups limit free-text edits so that the quote matches what Finance will bill.

Who does it

Reps request quotes. Deal desk, Sales Ops and Finance maintain the rules and approve exceptions. Product teams own the catalogue.

Systems

- **CPQ:** Salesforce CPQ and Revenue Cloud, Conga CPQ (formerly Apttus), Oracle CPQ, SAP CPQ, DealHub, Tacton for configurable products, PROS for pricing optimisation.
- **Billing-linked quoting:** Zuora and similar subscription platforms offer quote tools tied to billing.
- **ServiceNow-style workflow platforms:** can run sales and order management with approvals.
- **BI:** discount analysis by rep, product and region.

Metrics

Quote turnaround time, approval cycle time, average discount, discount by rep and segment, share of deals needing non-standard terms, and quote-to-order accuracy.

Common mistakes

- Side deals outside the quote tool, which Finance only discovers at booking.
- A catalogue with too many products and bundles, which makes quotes error-prone.
- Approval rules that send everything to the same few people.
- Never reviewing whether discounts actually improved win rate.

Stage 5: Contracting

Purpose

Turn the approved quote into a legally binding agreement and capture its key terms in a form other systems can use.

What happens

Choose the paper. Standard company paper is fastest. Customer paper takes longer and needs more legal review. Typical documents are a master services agreement (MSA), an order form or statement of work, a data processing agreement, a non-disclosure agreement and partner agreements.

Negotiate with guardrails. A clause library lists approved wording and fallback positions. Legal sets which changes the contracts team can accept alone and which need escalation, for example liability caps, indemnities, data and security terms, and intellectual property.

Sign. Electronic signature is standard. Check who is authorised to sign for each side.

Store and extract. The executed contract goes into a searchable repository. Key data is captured as fields: start and end dates, term, auto-renewal, notice periods, products, prices, payment terms, termination rights and special obligations. Some CLM tools use AI to read contracts and extract these fields, but a person should verify them.

Hand off. The contract is the source of truth for order booking. If the quote and the contract differ, the contract wins and the order team must be told.

Who does it

Contracts team or customer agreements analysts, Legal, and Sales Ops. Finance reviews payment and revenue terms.

Systems

- **CLM:** Icertis, Ironclad, DocuSign CLM, Conga CLM, Agiloft.
- **E-signature:** DocuSign, Adobe Acrobat Sign.
- **CRM and CPQ:** to generate the contract from the approved quote.

Metrics

Contract cycle time, share signed on standard paper, redline rate, time in legal review, and the percentage of contracts with complete key-term data.

Common mistakes

- Renewal dates and notice periods not entered in a system, so renewals are missed or auto-renew by surprise.
- Signed documents saved in email or personal drives.
- Quote terms and contract terms drifting apart.
- No fallback clause positions, so every redline goes to Legal.

Stage 6: Order booking and management

Purpose

Check that the signed deal is complete and correct, then record it as a booking that Finance, billing and delivery teams can act on.

What happens

Validate the order. The order team compares the order to the contract: products and quantities, prices, currency, start and end dates, bill-to and ship-to addresses, tax details, purchase order number and payment terms. They also check the customer record (legal name, tax registration, credit status) and, for partner sales, the end customer and partner entitlement.

Check credit and compliance. New or high-value customers may need a credit check. Export control and sanctions screening applies to some products and countries.

Book the order. The order is entered or synced into the ERP system and creates the records that billing and fulfilment need. Booking is also when many companies count bookings for sales compensation, so the definitions must be consistent between Sales and Finance.

Reject and correct with reason codes. If the order has errors, send it back with a standard reason code (for example missing PO, price mismatch, wrong entity, missing tax ID). Reason codes let you count the top causes and fix them at the source.

Handle changes. Amendments, upgrades, cancellations, credits and rebills all pass through order management. Keep an audit trail of every change.

Who does it

Order Management, sometimes called the booking desk or order desk, working with Sales Ops, Contracts and Finance.

Systems

- **ERP and order management:** SAP, Oracle, Microsoft Dynamics 365, NetSuite.
- **Workflow platforms:** ServiceNow Sales and Order Management and similar tools that connect CRM, contracts and fulfilment.
- **Integration tools:** MuleSoft, Boomi, Workato, which move data between CRM, CPQ and ERP.

Metrics

First-pass yield (orders accepted without correction), booking cycle time, rejection rate and top rejection reasons, and the number of manual touches per order.

Common mistakes

- Fixing errors by email, so no one learns the root cause.
- Re-keying data from the quote into the ERP by hand, which creates typos.
- Different definitions of a booking between Sales and Finance.
- No clear owner for credits and rebills, so they take weeks.

Stage 7: Fulfilment, invoicing and revenue recognition

Purpose

Deliver what was sold, bill the customer correctly and on time, and record revenue according to accounting rules.

What happens

Fulfil. For software, this means provisioning licences or activating subscriptions. For hardware, shipping and delivery. For services, scheduling and completing milestones. Delivery dates often decide when billing and revenue start.

Set the billing schedule. Common models: upfront annual billing, quarterly or monthly billing, milestone billing for projects, usage-based billing (charges depend on measured consumption), and time-and-materials. Subscription businesses also need rules for proration (partial periods), upgrades, downgrades, ramps and co-terming.

Create and send invoices. Invoices must carry the details the customer's accounts payable team requires: legal entity, PO number, tax numbers, correct currency and payment terms. Some customers require invoices through a portal or an electronic invoicing network. In India, GST invoicing and e-invoicing rules apply to many companies, so tax setup matters.

Handle usage and partner billing. Usage data from products must be collected, validated and rated before invoicing. For partner or OEM models, billing may be a royalty or revenue-share statement based on partner-reported volumes, which needs reconciliation.

Recognise revenue. Revenue accounting follows standards such as ASC 606 (US) and IFRS 15. In simple terms, revenue is recognised as the company satisfies performance obligations, which may be different from when the invoice is sent or cash arrives. A subscription is usually recognised over time, while a perpetual licence may be recognised at delivery. Deals with multiple products need the price allocated across them. Sales Ops and deal desk should flag unusual terms (acceptance clauses, refunds, side letters) to Revenue Accounting early.

Track deferred revenue. When a customer pays in advance, the amount is a liability until the service is delivered, then moves to revenue.

Who does it

Billing team, Revenue Accounting, Tax, and Order Management. Product and Operations teams provide delivery and usage data.

Systems

- **Subscription and billing:** Zuora, Chargebee, Maxio, Stripe Billing, Oracle and SAP billing modules, NetSuite.
- **Revenue recognition:** Zuora Revenue, NetSuite Advanced Revenue Management, Oracle Revenue Management, SAP RAR, specialised tools such as RevStream.
- **Tax:** Avalara, Vertex, and local e-invoicing providers.
- **Usage metering:** product telemetry feeding the billing system.

Metrics

Invoice accuracy, days from booking to invoice, billing disputes per thousand invoices, credit memo rate, unbilled revenue ageing, and revenue leakage (services delivered but not billed).

Common mistakes

- Invoices without a required PO number, which are rejected by the customer.
- Incorrect tax or entity, which creates credit notes and delays.
- Billing schedules set up manually and not matching the contract.
- Finding revenue recognition issues only at quarter close.

Stage 8: Collections and cash application

Purpose

Get paid on time without damaging the customer relationship, and match every payment to the right invoice.

What happens

Set clear terms. Payment terms (such as net 30 or net 45) come from the contract. The shorter and clearer they are, the better the cash position.

Segment customers by risk. Combine credit score, payment history, invoice size and strategic importance. High-risk or large accounts get early personal contact, while low-risk accounts get automated reminders.

Run a dunning (reminder) cadence. A typical pattern: a pre-due reminder a few days before the due date, a notice on the due date, then escalating follow-ups at set intervals after it, moving from email to phone to a manager or account owner contact. Keep the tone professional and the message specific: invoice number, amount, due date, and how to pay.

Make it easy to pay. Offer bank transfer details, payment links, cards, UPI, ACH or direct debit as relevant, and a customer portal where they can see invoices and statements.

Apply cash. Cash application matches incoming payments (bank statements, remittance advices) to open invoices. Partial payments, short payments, bundled payments for many invoices and missing remittance details make this hard. Automation matches most items, and analysts handle the exceptions.

Manage disputes. Record each dispute with a reason (price, quantity, service quality, missing PO, tax). Route it to the right team (Sales, Billing, Customer Success, Legal) with a deadline. Most disputes are caused by earlier stages, so track root causes and report them back to the owners.

Escalate and reserve. Long overdue accounts may be escalated to management, put on credit hold, referred to a collection agency or legal action, and reserved for in the accounts (bad debt allowance). Use these steps carefully, since they affect customer relationships and renewals.

Forecast cash. Collections teams forecast incoming cash by customer using past payment behaviour, which helps treasury plan.

Who does it

Collections and Accounts Receivable (AR) teams, with Customer Success and Sales supporting on strategic accounts. Treasury uses the forecast.

Systems

- **AR and collections platforms:** HighRadius, Billtrust, Esker, Tesorio, Gaviti, Upflow, Chaser, and the collections modules in SAP and Oracle.
- **Payment collection:** Razorpay, Cashfree, PayU (India), Stripe, PayPal, Adyen, bank portals and direct-debit services.
- **Cash application and bank feeds:** modules inside the AR platforms or ERP.
- **Customer portals and invoice networks:** self-service invoice and payment pages.

Metrics

Days sales outstanding (DSO) = accounts receivable divided by credit sales, multiplied by the number of days in the period. Also best possible DSO, average days delinquent, percentage past due by age bucket, collection effectiveness index, dispute rate and resolution time, and bad debt write-offs.

Common mistakes

- Treating disputes as a collections problem when the cause is an incorrect invoice or contract.
- Starting follow-up only after the due date.
- Sending the same reminder to every customer.
- No link between collections status and Sales, so reps sell more to customers who are not paying.

Stage 9: Customer success and onboarding

Purpose

Help customers reach value quickly, so they stay, renew and buy more.

What happens

Hand off from sales. The handoff note covers the customer's goals, success criteria, stakeholders, commitments made during the sale, contract terms and any risks. A weak handoff is one of the most common causes of early churn.

Onboard. The onboarding plan has milestones: kickoff, technical set-up, training, first use case live, and the first value moment. Time to first value is a key metric.

Track adoption and health. A customer health score combines product usage, support ticket volume and severity, survey scores (such as NPS), stakeholder engagement, payment behaviour and contract status. Scores should be checked against actual renewals so the weights improve over time.

Run reviews. Regular business reviews compare results with the goals the customer set at purchase and plan the next phase.

Manage risk. Playbooks define what to do when health drops: executive outreach, a recovery plan, product support or a training refresh. Support, product and finance data all feed the picture.

Segment coverage. High-touch customer success managers cover large accounts. Mid and small customers often get pooled or digital coverage using automated emails, in-product guides and communities.

Who does it

Customer Success, Support, Professional Services and Implementation. Sales Ops supports with account data, hierarchies and reporting.

Systems

- **Customer success platforms:** Gainsight, Totango, ChurnZero, Vitally.
- **Support and service:** ServiceNow Customer Service Management, Zendesk, Salesforce Service Cloud.
- **Product analytics:** Mixpanel, Amplitude, Pendo and in-house telemetry.
- **Survey tools:** for NPS and CSAT.

Metrics

Time to value, adoption rate, health score distribution, NPS or CSAT, support ticket trends, gross revenue retention and customer churn.

Common mistakes

- The handoff loses what the customer was promised.
- Health scores built from opinion and never validated.
- Customer Success contacted about the customer only when a renewal is near.
- Different teams hold different customer data, so no one sees the whole picture.

Stage 10: Renewals and expansion

Purpose

Keep the revenue already won and grow it. In subscription businesses, renewals and expansion often exceed new business revenue over time.

What happens

Create renewal opportunities early. Systems should create the renewal record automatically from the contract, usually 120 to 180 days before expiry for larger accounts. Notice periods and auto-renewal clauses set the real deadlines.

Forecast renewals. Mark each renewal with a risk status, based on health score, executive sponsor, usage, open escalations and competitor activity. The renewal forecast has its own categories and is usually more predictable than the new business forecast.

Plan pricing. Options include a price uplift allowed by the contract, co-terming added products to a single date, multi-year renewals in return for a rate lock, and moving customers to new packages.

Find expansion. Triggers include high usage near licence limits, new teams adopting, new business units, new products, and customer success feedback. Whitespace analysis compares what a customer owns with what similar customers own.

Close and book. A renewal goes through quote, approval, contract and order booking again, so the earlier stages loop back. Streamlined renewal paths (for example, auto-generated quotes and e-sign) reduce manual work.

Learn from churn. For lost renewals, record the reason (price, product gaps, competitor, budget cut, poor adoption, acquisition) and review the pattern with Product and Customer Success.

Who does it

Renewals managers, Customer Success, Account Managers and Sales Ops. Finance monitors retention.

Systems

- **CRM and CPQ:** renewal opportunities and quotes.
- **Customer success platforms:** renewal centres and playbooks (Gainsight and others).
- **Billing and subscription tools:** auto-renewal and price uplift rules.
- **BI:** retention cohorts and churn analysis.

Metrics

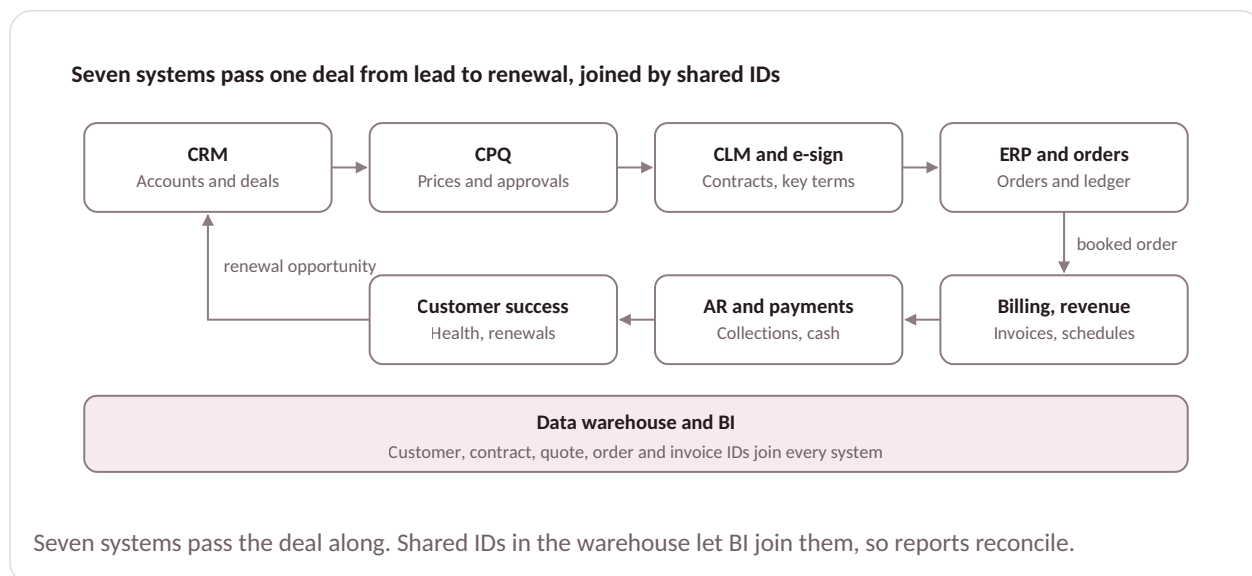
Gross revenue retention (GRR), net revenue retention (NRR), renewal rate by dollars and by count, price uplift, churn reasons, expansion bookings, and the share of renewals started on time.

Common mistakes

- Starting the conversation 30 days before expiry.
- Auto-renewals that surprise customers and cause disputes.
- No data link between support issues and renewal risk.
- Treating a renewal as a simple order, with no commercial strategy.

The enterprise tool landscape

A mature Sales Ops stack has layers. Each layer has a main job, a system of record and a set of data it owns.



1. CRM: the customer system of record

Holds accounts, contacts, leads, opportunities, activities and often quotes. Examples: Salesforce, Microsoft Dynamics 365, HubSpot, Zoho, SAP Sales Cloud. The CRM is where Sales Ops spends most time: configuring fields, stages, validation rules, page layouts, automation, permissions and reports. Keep the data model simple, document every custom field and archive fields no one uses.

2. Data, enrichment and intent

Provide company and contact data, firmographics, technographics and buying signals. Examples: ZoomInfo, Dun & Bradstreet, Apollo, LinkedIn Sales Navigator, 6sense, Demandbase, Bombora. Use one agreed source for company identity and refresh it on a schedule.

3. Marketing automation and routing

Capture and nurture leads, score them and pass them to Sales. Examples: HubSpot, Marketo, Salesforce Account Engagement, Eloqua, with routing tools such as LeanData and Chili Piper.

4. Sales engagement and conversation intelligence

Sequence outreach and record or analyse calls. Examples: Outreach, Salesloft, Apollo, Gong, Chorus. These tools generate activity data, which feeds coaching and forecast analysis.

5. Forecasting and revenue intelligence

Roll up the pipeline, inspect deals and predict outcomes. Examples: Clari, Aviso, BoostUp, Gong Forecast, plus native CRM forecasting.

6. Planning, territory, quota and compensation

Design territories, model capacity, set quotas and pay commissions accurately. Examples: Anaplan, Fullcast, Varicent, Xactly, CaptivateIQ, Spiff-style commission tools. Commission errors damage trust quickly, so plan data and rules must be checked before every payout.

7. CPQ and pricing

Configure products, enforce price and discount rules, create quotes and route approvals. Examples: Salesforce CPQ and Revenue Cloud, Conga CPQ (formerly Apttus), Oracle CPQ, SAP CPQ, DealHub, Tacton, PROS.

8. Contract lifecycle management and e-signature

Draft, negotiate, sign, store and analyse contracts. Examples: Icertis, Ironclad, DocuSign CLM, Conga CLM, Agiloft, Adobe Sign, DocuSign.

9. ERP, order management and workflow

Book orders, manage the financial ledger, inventory and fulfilment. Examples: SAP S/4HANA, Oracle Fusion and NetSuite, Microsoft Dynamics 365, and workflow platforms such as ServiceNow for sales and order management, customer service and approvals.

10. Subscription billing and revenue recognition

Billing schedules, usage rating, invoicing and revenue schedules. Examples: Zuora, Chargebee, Maxio, Stripe Billing, Oracle and SAP billing modules, NetSuite ARM, specialist revenue tools.

11. Accounts receivable, collections and payments

See the dedicated section below.

12. Customer success and support

Health scoring, playbooks, onboarding and ticketing. Examples: Gainsight, Totango, ChurnZero, Vitally, ServiceNow CSM, Zendesk, Salesforce Service Cloud.

13. Integration and automation

Connect the systems so data moves without re-keying. Examples: MuleSoft, Boomi, Workato, Zapier for lighter workflows, and native connectors. Document each integration: what it moves, how often, who owns it and what happens when it fails.

14. Process analytics

Process mining tools such as Celonis analyse system logs to show how orders and invoices actually flow, where they loop back and where they wait. They are useful once a process is large enough to have hidden delays.

Business intelligence and reporting

BI turns data from these systems into decisions. Sales Ops usually owns the sales reporting layer and works with a central data or analytics team.

The data stack

1. **Sources:** CRM, CPQ, ERP, billing, AR, customer success, marketing, product usage.
2. **Pipelines:** tools that extract and load data, such as Fivetran, Airbyte, Stitch, or custom jobs.
3. **Warehouse or lakehouse:** where combined data lives. Examples: Snowflake, Google BigQuery, Amazon Redshift, Databricks, Azure Synapse.
4. **Transformation:** cleaning and modelling data into business-ready tables, often with dbt or SQL.
5. **BI and visualisation:** dashboards and analysis. Examples: Tableau, Microsoft Power BI, Looker, Qlik, Sigma, Domo, and built-in CRM dashboards.
6. **Activation:** sending insights back into daily tools, so a score or alert appears in the CRM.

Choosing a BI tool

- **Power BI** suits organisations already on Microsoft 365 and Azure.
- **Tableau** is strong for flexible visual analysis.
- **Looker** suits teams that want one governed definition of each metric.
- **Native CRM reports** are fine for operational lists and simple dashboards, but cross-system analysis usually needs a warehouse.

The reports every Sales Ops team should own

- **Pipeline and forecast:** coverage, stage conversion, aging, pushed deals, forecast versus actual by week.
- **Sales performance:** attainment by rep and team, ramp curves, activity-to-outcome ratios, win and loss reasons.
- **Pricing and discounting:** discount by rep, product and region, approval times, margin impact.
- **Order and billing quality:** first-pass yield, rejection reasons, invoice accuracy, days to invoice.
- **Collections and cash:** DSO, aging buckets, disputes, promise-to-pay compliance, cash forecast.
- **Retention:** GRR, NRR, renewal pipeline, churn reasons, cohort curves.
- **Customer health:** adoption, support, health score, risk list.

Dashboard design principles

- Start with the decision the dashboard should support, such as "which deals to inspect this week", not with the data available.
- Show a small number of metrics, defined in writing, with the same definition everywhere.
- Always show trend and target together.
- Allow drilling from summary to record, so managers can act.
- Show data freshness. A stale dashboard destroys trust.
- Assign an owner to each dashboard and retire ones nobody uses.

Data governance

Metric definitions (what exactly is a booking, an MQL, churn?) need to be agreed with Finance and documented. Control access by role. Keep a change log for report logic. Check data quality with automated tests, such as accounts with no owner or closed-won deals with no contract.

Cash collection tools in depth

Collections technology has four jobs: forecast who will pay late, communicate with customers, apply cash, and resolve disputes.

Capabilities to look for

- **Customer segmentation and prioritisation:** which accounts to call first, using risk scores and invoice value.
- **Automated dunning workflows:** reminders by email, text or portal message, with templates by segment and language.
- **Customer portals and payment links:** customers view invoices, download statements, raise disputes and pay online.
- **Cash application automation:** matching bank data and remittances to invoices, with tools that read remittance emails and PDFs.
- **Dispute and deduction management:** logging, assigning and tracking disputes and short payments to closure.
- **Promise-to-pay tracking:** records what customers commit to, then flags broken promises.
- **Cash forecasting:** predicting payment dates from history.
- **Reporting:** DSO, aging, effectiveness and dispute analytics.
- **ERP and billing integration:** invoice, payment and customer data should flow in both directions.

Typical tool categories

Category	Examples	Best for
Enterprise AR automation suites	HighRadius, Billtrust, Esker, SAP and Oracle collections modules	Large volumes, complex cash application
Mid-market collections tools	Tesorio, Gaviti, Upflow, Chaser	Faster set-up and workflows for finance teams
Subscription billing platforms	Zuora, Chargebee, Stripe Billing	Automatic recurring charges and card or direct debit retries
Payment gateways	Razorpay, Cashfree, PayU, Stripe, PayPal, Adyen	Accepting online payments, payment links, UPI, cards
Accounts payable networks and portals	Customer-run supplier portals	Complying with large customers' invoice rules

Implementation tips

- Clean customer master data first: duplicate or wrong billing contacts stop automation from working.
- Agree dunning rules with Sales and Customer Success so strategic customers are handled personally.
- Track root causes of disputes from the start.
- Start with the highest-value segment, prove the benefit (lower DSO or fewer past-due balances), then widen.
- Check payment gateway fees and local payment methods when selling in several countries.

How data flows end to end

The lead-to-cash chain only works when each handoff carries the right data forward.

- 1 **Account and lead data** (CRM, enrichment) flows into opportunities.
- 2 **Opportunity and product data** flows into the quote (CPQ).
- 3 **Approved quote** generates the contract (CLM), and key terms are stored as fields.
- 4 **Signed contract and quote** create the order (ERP or order management).
- 5 **Order** creates the billing schedule and fulfilment tasks.
- 6 **Invoices** go to the AR system and the customer portal, and journal entries go to the ledger.
- 7 **Payments** are applied to invoices and update customer balances.
- 8 **Contract, usage, support and payment data** feed the customer health score.
- 9 **Contract end date** triggers a renewal opportunity, which starts the quote step again.

Key identifiers that must stay consistent across systems: customer ID, contract ID, quote ID, order ID, invoice ID and product SKU. If any of these breaks, BI cannot join the data and reports will not reconcile.

The Sales Ops team: roles and skills

Role	Focus
Sales Ops manager or head	Strategy, process, planning, partnership with Sales and Finance leaders
Sales analyst	Pipeline, forecast and performance analysis
CRM administrator or systems analyst	Configuration, workflows, data quality, user support
Deal desk analyst	Pricing, approvals, deal structuring
Contracts or customer agreements analyst	Contract drafting, review support, key-term capture
Order management specialist	Booking validation, errors, amendments
Billing and collections specialist	Invoicing accuracy and cash follow-up (often in Finance)
Territory and compensation analyst	Territory design, quota, commission calculations
Enablement and training partner	Process training, playbooks, onboarding of new reps
Alliances and channel operations	Partner onboarding, partner pricing, partner transactions and reporting

Useful skills: process mapping, SQL and spreadsheet modelling, a BI tool, CRM administration, an understanding of pricing and revenue recognition, clear writing and stakeholder management, and the ability to say no with data.

Topics you may have missed

These areas are part of Sales Ops in many companies but are easy to overlook.

- **Sales compensation administration:** plan design, crediting rules, accelerators, clawbacks, dispute handling, payout accuracy and audit trails.
- **Sales enablement and onboarding:** playbooks, training, certification, content management, and ramp programmes for new reps.
- **Partner and channel operations:** partner programmes, tiers, deal registration, partner price lists, margin rules, ISV and OEM royalty processing, and partner performance reporting.
- **Pricing strategy and packaging:** value metrics, good-better-best packages, and regional price localisation.
- **Revenue operations (RevOps):** the broader model that joins Marketing Ops, Sales Ops and Customer Success Ops under one revenue process and shared metrics.
- **Compliance and controls:** segregation of duties (the person who creates a discount should not approve it alone), audit trails, SOX or similar controls in public companies, export controls, anti-corruption rules and data privacy.
- **Tax and e-invoicing:** GST in India, VAT elsewhere, withholding tax, and country-specific e-invoicing mandates.
- **Multi-currency and entity management:** which legal entity contracts, bills and collects, and how currency conversion is set.
- **Data quality and master data management:** one owner for customer, product and price data.
- **Change management and adoption:** every tool or process change needs communication, training and a feedback loop.
- **Security and access control:** least-privilege access to sensitive pricing and contract data.
- **Win-loss analysis and customer feedback:** structured reasons for won and lost deals.
- **AI and automation:** using AI for lead scoring, forecast signals, contract data extraction, quote assistance and collections prioritisation, always with human review for high-risk decisions.
- **Continuous improvement:** Lean and Six Sigma tools (such as DMAIC) apply well to order, billing and collections processes, because they have measurable defects like rejected orders and disputed invoices.

A practical 90-day plan for a new Sales Ops professional

Days 1 to 30: learn. Map the lead-to-cash process on one page. Meet each handoff team: Marketing Ops, Sales, Deal Desk, Legal, Order Management, Billing, Collections and Customer Success. Learn the systems and read the main reports. List the ten most common errors or delays people mention.

Days 31 to 60: measure. Pick four metrics (for example, forecast accuracy, quote turnaround, first-pass order yield and DSO). Write definitions, find the data source for each and publish a baseline. Quantify the top three problems by volume and cost.

Days 61 to 90: improve. Choose one or two fixes with clear owners, such as a standard reason code list for rejected orders or a missing-field validation on opportunities. Pilot the fix, measure the change, document the new process and share the result with stakeholders.

Quick glossary

- **ACV:** annual contract value.
- **ARR and MRR:** annual and monthly recurring revenue.
- **Booking:** a recorded commitment from a customer, defined by company policy.
- **CPQ:** configure, price, quote software.
- **CLM:** contract lifecycle management.
- **Deal desk:** the team that structures and approves non-standard deals.
- **DSO:** days sales outstanding, a measure of how quickly receivables turn into cash.
- **GRR and NRR:** gross and net revenue retention.
- **ICP:** ideal customer profile.
- **MQL, SAL, SQL:** marketing-qualified, sales-accepted and sales-qualified lead.
- **Co-terming:** aligning multiple purchases to one contract end date.
- **Dunning:** the process of sending payment reminders.
- **Cash application:** matching received payments to open invoices.
- **Deferred revenue:** cash received or billed for services not yet delivered.
- **RevOps:** revenue operations, a joined-up approach to sales, marketing and customer success operations.

Example logs and sample records

These are made-up samples that show the shape of the logs and records each stage produces. Customer names, amounts and times are illustrative, not company data. They are shown as text samples, not screenshots of a specific tool.

Lead routing log (stage 2)

Time	Lead	Source	Rule applied	Owner	Minutes to first touch
09:02	A. Rao, Finwave Ltd	Demo request	Named account	Priya (AE)	6
09:15	S. Khan, Orbit Retail	Webinar	Territory: South	Imran (SDR)	22
09:40	M. Das, unknown company	Pricing page	No match, round robin	Neha (SDR)	95 (SLA missed)
10:05	L. Chen, Brightline	Partner referral	Partner rule	Alliances queue	31

The third row is the log doing its job: a missed response time shows up as a number, so Sales Ops can see which rule left the lead waiting.

Deal approval log (stage 4)

Quote	Account	Discount asked	Why it routed	Approver	Decision	Hours to decide
Q-10482	Finwave Ltd	Within rep limit	Standard terms	None needed	Auto-approved	0
Q-10497	Orbit Retail	Next band	Above rep limit	Sales manager	Approved	3
Q-10511	Brightline	Large	Margin below floor	Deal desk, Finance	Rejected, reworked	26
Q-10511 v2	Brightline	Smaller, 2-year term	Multi-year ramp	Deal desk	Approved	8

Order booking rejection log (stage 6)

Order	Reason code	Detail	Sent back to	Fixed in (hours)
SO-7731	MISSING_PO	Customer requires a PO number	Sales Ops	5
SO-7742	PRICE_MISMATCH	Order price differs from signed contract	Deal desk	18
SO-7750	WRONG_ENTITY	Billed to parent, contract names subsidiary	Contracts	9
SO-7761	TAX_ID_MISSING	GST number absent on customer record	Customer data team	30

Counting reason codes monthly shows which upstream stage to fix first. In this sample, two of four rejections came from data entered before booking.

Invoice and dunning log (stages 7 and 8)

Invoice	Customer	Amount	Due date	Action	Result
INV-3301	Finwave Ltd	₹4,80,000	12 Oct	Reminder 5 days before due	Paid on due date
INV-3288	Orbit Retail	₹2,25,000	28 Sep	Due-date notice, then call at day 7	Promise to pay by 14 Oct
INV-3270	Brightline	₹9,60,000	15 Sep	Escalated to account owner at day 15	Disputed (see below)
INV-3265	Kiran Foods	₹1,10,000	10 Sep	Payment link re-sent	Paid, cash applied next day

Dispute log (stage 8)

Case	Invoice	Reason	Owner	Opened	Status
D-118	INV-3270	Quantity billed higher than delivered	Billing	2 Oct	Credit note issued
D-121	INV-3299	PO number missing	Order Management	6 Oct	Reissued, awaiting payment
D-124	INV-3312	Price differs from quote	Deal desk	9 Oct	Under review

CRM change log (stage 3)

Time	User	Object	Field	Old value	New value
8 Oct 11:20	Priya	Opportunity: Finwave Ltd	Close date	30 Sep	31 Oct
8 Oct 11:21	Priya	Opportunity: Finwave Ltd	Forecast category	Commit	Best case
9 Oct 15:02	Imran	Opportunity: Orbit Retail	Stage	Propose	Negotiate
9 Oct 15:05	Imran	Opportunity: Orbit Retail	Amount	₹18,00,000	₹16,50,000

A change log like this lets managers see pushed close dates and shrinking amounts before the forecast call. Many teams flag any close date pushed twice.

Sample opportunity record (stage 3)

Field	Example
Account	Orbit Retail (parent: Orbit Group)
Type	New business
Stage	Negotiate
Amount, close date	₹16,50,000, 31 Oct
Forecast category	Best case
Next step	Legal review of data processing terms, due 18 Oct
Contacts and roles	Economic buyer: CFO. Champion: Head of Operations. Evaluator: IT manager
Competitor	Incumbent vendor
Qualification (MEDDIC)	Metrics, champion confirmed. Decision process mapped. Economic buyer not yet met

Sample invoice header (stage 7)

Field	Example
Invoice number and date	INV-3301, 12 Sep
Bill-to legal entity	Finwave Ltd (as named in the contract)
PO number	PO-88421
Contract reference	MSA-2026-014, Order Form 2
Tax registration numbers	Seller GSTIN and customer GSTIN
Line items	Annual subscription, 12 months, 1 Oct to 30 Sep
Payment terms	Net 30, due 12 Oct
Remit to	Bank details or payment link