fielo Revenue Operations datasheet

Elevate your sales game with smart account management and actionable intelligence

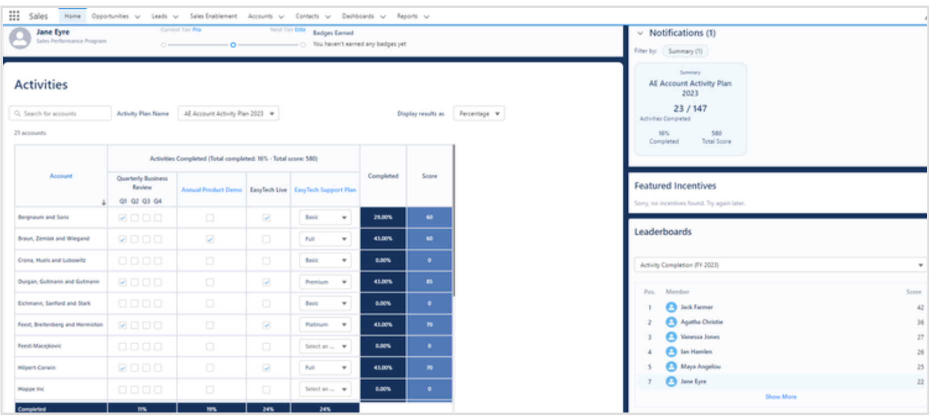
Fielo's RevOps ensures your Sales Reps and Account Managers stay on top of their accounts and relationship building cadence, while enabling sales leaders to identify organizational strengths and remediation needs to course correct lagging performance.

Most companies struggle to track sales execution - either relying on 1:1 conversations or outdated spreadsheets. Fielo RevOps provides a systematic, repeatable, and scalable solution that helps companies define a "*Perfect Playbook*" *that* will yield predictability and the best revenue outcome. Intelligent scoring identifies lagging performance indicators and at risk accounts before it is too late.

RevOps is designed to be:

1. Quick to setup - launch in minutes
2. Configurable by the business
3. Easy to use
4. Quick to interpret
5. Simple to drill-down

RevOps is a native Salesforce application, which means that the experience renders to AMs/Reps/Mgrs/VPs in their Sales Cloud interface, fully personalized to them. No additional sign-in or passwords. Increased status visibility. Improved operational alignment.



Define, Track, Analyze, and Remediate

1.Define

Plan a perfect sales engagement with:

- Activity and Relationship types
- Frequency
- Time parameters
- Performance levels

2. Track

Identify which AMs/Reps and/or Accounts are performing with a low score or behind schedule on specific Activities:

- Activity score
- Relationship score
- Notification reminders
- Performance ranking
- Leaderboards
- Manager alerts

3. Analyze

Sales Leaders can drill-up/down to identify where best to focus time and effort - whether with AMs/Reps, Accounts, specific Activities or Territories

4. Remediate

Employ various tactics to continuously improve Account Scores and/or Activity completion, including:

- Performance Alerts
- Sales coaching / training
- Product knowledge
- Time & Activity-based incentives

Celebrated software that drives
Engagement | Performance | Revenue

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Features designed to drive revenue improvement by aligning people, processes and outcomes

Activity Plans
Set up the activities you expect from your Reps/AMs for each of their accounts, including how frequently and by when those activities should be performed. Choose between activities that are simply marked as complete, versus those that have multiple statuses. Create multiple Activity Plans to reflect specific business initiatives/goals, or per function or department.

Relationship Plans
Map out the stakeholder roles that you want your account managers to build relationships with at their accounts, as well as the categories by which those relationship levels will be classified.

Account Scoring
Set a scoring weight for each activity and we'll calculate a success score for each of the accounts, allowing you to spot any accounts that may be neglected. Benchmark performance against a “perfect” score. Scores can also be aggregated by Rep/AM and by activity type to build a complete view of performance across your org.

Activity Tracking
Allow your Reps/AMs to check out which activities they are expected to perform and when, consult activity aids via contextual reference links, and mark activities as complete either directly in the planner or automatically from Salesforce. Managers can zoom out to view territory-level activity completion metrics.

Relationship Tracking
Prompt your Reps/AMs to rate their relationships with stakeholders at each of their accounts, and give sales managers a birds-eye view of account engagement efforts across the organization.

Notifications
Provide your Reps/AMs in-context reminders of any pending tasks or performance alerts for overdue items, as well as acknowledgments of a job well done to keep the momentum going. Managers can receive Account alerts.

Remediation
Use realtime metrics to course correct any at risk activity completions, or lagging performance whether by account or Rep/AM. Automate the delivery of materials, training/coaching or incentives direct to the account manager to help them become a top performer.

Accelerate Performance
Combine with Fielo’s incentive automation and create time and/or activity goal-based rewards - points, cash, badges, instant rewards or tiers - to motivate Reps/AMs. Utlise leaderboards, badges and tier status to show account manager performance compared to their peers. Create a competitive spirit amongst Reps/AMs or teams.

Online Content and Training
Leverage Fielo’s Learning Management System (LMS) to provide content and training materials to remind a Rep/AM how to successfully complete an activity.

Prebuilt Components
Drag & drop Lightning Web Components for Planners and Notifications can be quickly added directly to the organizations Sales Cloud, where Reps/AMs conduct their everyday business in Salesforce CRM.

Analytics
Get up-to-the-minute dashboards on activity completion, relationship building over time, top scoring accounts and Reps/AMs, and performance broken down by territory. Stack rank performance by Account and Reps/AMs.

RevOps Administration
RevOps administration is easy, intuitive and easy to use for any Salesforce user with the valid permissions. Point and Click experience without the need for IT development.

Hierarchy Setup
RevOps automatically configures to your Salesforce hierarchy, whether you are using Enterprise Territory Management or Salesforce’s default Roles and Hierarchy.

Contact us to learn more about our solutions:
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