

The Revenue Operating Workbook

*Revenue Operations for Founders:
From First Sale to Repeatable Growth*



WHAT YOU'LL LEAVE WITH

- A scored picture of your revenue engine
- Four playbooks — pipeline, pricing, follow-up, retention — written for your business
- A straight answer on CRM, automation and AI
- One change on your calendar before you walk out

Name _____

Two quick things before we start.

Nobody sees this page but you.

1. How confident are you that you know which part of your business most needs a system?

no idea (1) (2) (3) (4) (5) I know exactly

2. Finish this sentence with your first instinct:

The part of my business that most needs a system is _____

My Revenue Engine

Every business that makes money runs the same four motions. Yours already does.



Underneath all four: does this run on a **system** — or on your **memory**?

Write one thing you already do in each block. Not launched yet? Write one thing you plan to do — planned counts.

① How does someone first find out you exist? ATTRACT <i>demand generation</i>	② What happens between interested and money in your account? CONVERT <i>sales process</i>
③ What does each sale bring in? DELIVER & CAPTURE <i>pricing and value capture</i>	④ What happens after the first sale? RETAIN & EXPAND <i>retention, repeat, referral</i>

The foundation

Right now, most of this engine runs on: ☐ a system ☐ my memory ☐ some of both

That question — system or memory — is what revenue operations actually means.

Scope, so you know what we are not covering. Deliver & Capture is the revenue side — what you charge and what a sale is worth. Cost structure, and collecting money you have already billed, are real problems and they are different conversations.

Engine Audit

Five scores, one scale, honest. In professional practice this is called a maturity assessment.

1 — ad hoc

5 — repeatable

it happens if I remember

it would keep running if I disappeared for two weeks

Most owner-run businesses score between 1 and 3 on almost everything. That is normal — it means the business runs because you work. Score honestly; this page is for you.

ATTRACT

new people finding me

1: they find me by accident · 5: something visible happens every week, on a schedule

1 2 3 4 5

CONVERT

interest becoming money

1: I follow up when I remember · 5: every open conversation has a written next step and a date

1 2 3 4 5

DELIVER & CAPTURE

what each sale brings in

1: I set the price once and have not revisited it · 5: I review price and value on a schedule

1 2 3 4 5

RETAIN & EXPAND

after the first sale

1: I hope they come back · 5: a check-in and a referral ask happen every time, automatically

1 2 3 4 5

THE SYSTEM UNDERNEATH

where all of it lives

1: it is in my head · 5: someone else could read my records and know what to do next

1 2 3 4 5

My lowest score is _____ in _____

Reading your scores

Mostly 1s and 2s. Normal, and it means you are the system. Today you choose the first piece to take out of your head.

The four motions score higher than the system underneath. Very common in a business that has been running a while. You are good at all four — you are just the only place any of it is written down. That is a different problem from being weak at marketing, and it has a different fix.

One score clearly below the others. That is your first build. The math on the next page will confirm it or point somewhere else.

All 4s and 5s. Either the business runs without you for two weeks, or the scoring was generous. You will know which by Friday.

Not launched yet?

Score the plan instead of the past. For each row: do you have a designed way this will happen, or a hope? A written plan you will follow is a 3. A hope is a 1. That is not a criticism — it is a to-do list.

Pair moment

Find someone at a different stage than you. Share your **lowest** score and the story behind it. One minute each.

My Engine Math

Revenue is four observable numbers — the same four motions, wearing math.

The example we built together — a cleaning company:

20 conversations × 30% say yes × \$400 average job × 1.5 repeat and referral ≈ **\$3,600 a month • \$43,200 a year**

Now yours. Estimates are welcome — an estimate beats a blank.

_____ conversations a month	<i>opportunities</i>
× _____ % say yes	<i>conversion rate</i>
× \$ _____ average sale	<i>average order value</i>
× _____ come back or send someone	<i>retention & referral rate</i>
= \$ _____ a month × 12 = \$ _____ a year	

Circle the number above that is furthest from where it should be.

Honesty check. Which of these four could you have stated from memory before today?

☐ 1st ☐ 2nd ☐ 3rd ☐ 4th ☐ none

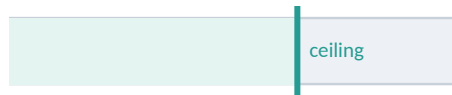
Small improvements multiply. Ten percent better on all four is about **46% more revenue**, with nothing heroic anywhere.
 $1.1 \times 1.1 \times 1.1 \times 1.1 = 1.46$

Your business may not be this shape. Three adjustments.



More than one channel?

Run the math once per channel. Wholesale is few conversations and large orders. A market stall is many conversations and small ones. Blended together, the answer disappears into the average.



Selling your hours?

Add a line: hours you can actually sell in a month — _____. That ceiling is your real constraint, and it changes which lever is worth pulling. More conversations will not help if you cannot serve them.



Subscription?

Your fourth lever is renewal, not repeat purchase. Same position in the engine, different math — and churn is the number that decides it.

Channel 1	conv × % × \$ × repeat	= \$
Channel 2	conv × % × \$ × repeat	= \$

Not launched yet? Run it backward.

I want to earn \$_____ a month ÷ average sale \$_____ = _____ customers

÷ 25–30% say yes = _____ conversations a month ÷ 4 = _____ a week

That is your first real number — and your Attract plan now has a job description.

Where I Systematize First

One motion. Chosen by the evidence, not by the worry.

Warm-up — read two businesses first.

A **service business**: the phone rings constantly, quotes go out every week, almost nobody says yes.

Which motion needs a system?

☐ Attract ☐ Convert ☐ Deliver & Capture ☐ Retain

A **taqueria**: packed every weekend, regulars know the staff, prices have not moved in three years and neither has the month-end number.

Which motion needs a system?

☐ Attract ☐ Convert ☐ Deliver & Capture ☐ Retain

Now yours. One sentence.

The part of my engine that most needs a system is _____

because my score there was _____ (page 2),

my math shows _____ (page 3),

and what I keep seeing is _____

What actually happens — the quotes that go quiet, the empty week, the busy month that did not pay.

One answer

You are going to build one thing in the next thirty days. Let the evidence choose it rather than the worry.

*In professional practice, a claim your evidence supports and a short test can confirm is called a **hypothesis**.*

Check your cover

Your first instinct said:

- ☐ the same place
- ☐ somewhere different

Either answer is useful. You now have evidence where you had a hunch.

Attract *demand generation*

MOVES: CONVERSATIONS

START HERE

One channel. One habit. Weekly, on the calendar.

Not three channels occasionally — one channel, repeatedly. Pick the channel where your last three customers actually came from, even if that channel is "a neighbour pointed at my truck." That still counts; it is just not on a calendar yet.

AT SCALE

You track which channel produces customers who *stay*, not just customers who buy — and you stop spending evenly across all of them. Most owners discover one channel quietly carries the business.

WHAT MAKES IT STICK

This is the only motion with no deadline and nobody waiting on you. Every busy week, it is the first thing dropped. So it goes on the calendar **ahead** of client work, not after it. Scheduled for "after," it does not exist.

Write yours

My channel _____

My day and time _____ for _____ minutes

The first thing I will do in that slot _____

How I will know it happened _____

Not launched yet? Your channel is wherever the people you want to serve already gather. Name one, and name the thirty minutes. You can change the channel later; changing the habit is the hard part.

Convert *sales process*

MOVES: SAY-YES RATE

Half one — your pipeline

Five columns. Every open name sits in one of them, with a written next step and a date.

Lead	Conversation	Proposal	Decision	Won / Lost

AT SCALE

Stages get **exit criteria** — what has to be true before something moves forward. Then the pipeline stops being a record and becomes a forecast you can weight and review weekly.

WHAT MAKES IT STICK

A pipeline turns into a list the moment names sit in it with no next step. Once it is a list, nobody trusts it. One rule protects it: **no next step and date, not in the pipeline.**

Write yours — my five stages, in my language

Half two — your follow-up

Written in advance, not composed in the moment.

Quote
goes out

+2 days
Any questions on the quote?

+7 days
Still interested? Either answer is fine.

+14 days
Something useful — a photo, a tip, a reminder. No ask.

Stop
gracefully, door open

AT SCALE

A sequence inside a system, triggered automatically, with reply rates measured per touch — so you learn which message works instead of guessing.

WHAT MAKES IT STICK

The third touch is the one that depends on mood, and it is where a lot of deals land. Write the messages once, on a good day, and sending becomes a decision you already made.

Annoying is frequency without value. Three touches that each carry something useful are not annoying.

Write yours — the +7 message

Not launched yet? Write the stages you expect and the +7 message you would send. You will correct both after five real conversations.

Deliver & Capture *pricing and value capture*

MOVES: AVERAGE SALE

START HERE

One hour a quarter on price and value.

New prices start with new customers — that is how you de-risk the change. Nobody who already trusts you gets a surprise, and you learn what the market says before you touch existing relationships.

AT SCALE

Margin by segment and by product line. You learn which customers are genuinely worth having, and some of them are not — which is a useful and slightly uncomfortable thing to find out.

WHAT MAKES IT STICK

Price reviews only ever happen in a crisis — which means you raise prices when you are desperate, the worst position to negotiate from. On a quarterly calendar it is a ritual instead of an emergency.

Write yours

My average sale today \$_____ Plus 10% \$_____

Over a year that difference is roughly \$ _____ *use your page 3 numbers*

My quarterly review date _____

What I would need to believe to raise prices _____

Not launched yet? Price from what the result is worth to the customer, not from what it costs you to deliver. Write down the number you are afraid to charge — it is usually closer to right than the one you were going to use.

Scope note. This is the revenue side. If money you have already billed is not arriving, that is a collections problem — real, common, and a different conversation.

Retain & Expand *retention, repeat, referral*

MOVES: REPEAT & REFERRAL

START HERE

After every job or sale: one check-in that carries something useful, and one direct ask.

"Who else do you know who needs this?"

Written once, said every time.

AT SCALE

Cohort retention, a tracked referral programme, and you learn which customers send you the good ones. They do not all send the same quality.

WHAT MAKES IT STICK

The ask waits for the moment to feel right, and the moment rarely does. Attach it to a trigger — job finished — not to a feeling. The words stay the same every time, which is what makes it repeatable.

If your customers genuinely only buy once, referral is your fourth lever. Every one of them knows other people in the same situation.

Write yours

My check-in, and the useful thing it carries _____

My referral ask, word for word _____

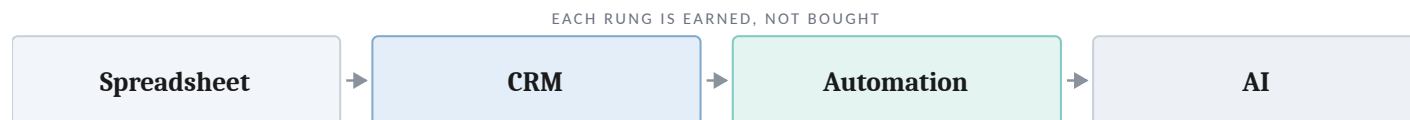
My trigger: ☐ after every job ☐ after every sale ☐ 30 days after ☐ other _____

Five people who get this message this week:

Say your referral ask in your head. If you cringed, rewrite it until you do not.

Tools

Technology follows process. Not the other way round.



Climb one rung when the one you are on costs you **more than an hour a week**.

That is the only signal that matters. Not revenue, not headcount, not what a competitor uses.

I am on rung: ☐ spreadsheet ☐ CRM ☐ automation ☐ AI Have I earned the next one? ☐ yes ☐ not yet

Tools multiply your process — including a bad one. Buying software to avoid designing the process gets you a bad process, faster.

Two different AI decisions. People collapse them into one.

What touches your customer

This is **strategy**. Some businesses win by promising there is no AI in the output. That is a real position, and it is defensible.

What runs your back office

This is mostly **economics**. Nobody sees it, so it earns you no credit either way. Decide it deliberately rather than by default.

Useful: drafting follow-ups · summarizing calls · cleaning up lists · first-draft proposals

Not useful: pricing · relationships · judgment

Handling confidential information — clinical, financial, anything involving minors? The question is not whether to use the tool. It is what data goes into it.

Categories, with examples. The brand matters less than whether you open it on Friday.

Spreadsheet: Google Sheets, Excel. **CRM:** free tiers exist and they are fine — HubSpot, Zoho, Less Annoying CRM. **Automation:** Zapier, Make — only after the process works by hand. **AI:** any general assistant, used for the four tasks above.

My one tool decision for the next 30 days

What I will do _____

What I will **not** buy yet _____

My Next 30 Days

One change. One behaviour. One number. One date.

One change I am making

example: a five-column pipeline in a spreadsheet

Who owns it

Start date

usually: me

this week, if you can

The behaviour, written as if-then

If it is _____ (day) at _____ (time), then I _____ for _____ minutes.

example: If it is Friday at 8:00, then I review the pipeline for 20 minutes

One number I will watch

now _____ → in 30 days _____

example: quotes with a written next step — about half → all of them

Cadence ☐ daily ☐ weekly ☐ after every job ☐ monthly

Put it on your calendar now, before you leave this room.

A plan without a calendar slot is a wish. We just spent an hour on the argument that systems beat memory — this is that argument, applied to you.



DONE

What I am not doing yet

One change, thirty days. Write down what you are setting aside.

Writing a plan as "if [day and time], then [action]" measurably raises follow-through. The research term is an **implementation intention** (Gollwitzer & Sheeran).

If you use SMART goals: this is the same discipline with one addition. Specific, measurable and time-bound are all here. What SMART does not give you is the trigger — and the trigger is what decides whether it happens.

Keep Going

Everything you might need after today, on one page.

The minimum data to write down

Starting out: name · where they came from · status · next step · date.

Growing: add value (\$) · likely to close (%) · why won or lost. That is all of it. Resist adding a fortieth field.

A follow-up sequence you can use as written

Quote day → **+2 days:** "Any questions on the quote?" → **+7 days:** "Still interested? Either answer is fine — I just don't want to leave you hanging." → **+14 days:** something useful, no ask. → **Then stop**, with one line that leaves the door open.

The five pipeline stages, verbatim

Lead → Conversation → Proposal → Decision → Won / Lost.

Every name carries a next step and a date, or it does not belong in the pipeline.

The words, in both languages

conversations → *opportunities*

say-yes rate → *conversion rate*

average sale → *average order value*

come back or send someone → *retention and referral*

system, not memory → **revenue operations**

steps of a sale → *pipeline stages*

what must be true to move forward → *exit criteria*

how often you inspect it → *operating cadence*

scored 1 to 5 → *maturity assessment*



Digital versions of every page, the templates, and the resource list.

Office hours, first Fridays. Details at the QR code.

If something in here does not fit your business, that is worth a conversation — most of the time the shape is different, not the principle.

