ICEBERG
·REVOPS·

Operations Practical Exercise

These scenarios will help you evaluate candidates for strategic operations roles. For more information on how to use them, check out the full ebook: HERE.

Company Info

Name: SaaS Works
Primary Contact: VP Sales, Taft Love
- SaaS company with $5m in ARR.
- Currently using Salesforce, Outreach, LeanData, and more.
- Sales team is 2 SDRs and 6 AEs.
- GTM is marketing-focused. They live almost 100% off inbound leads. No outbound prospecting.
- No internal sales operations function. No Salesforce admin, so they lack a clear understanding of Salesforce best practices or limitations.
- They don't yet view Iceberg as a partner. Their tendency is to request specific changes to their systems instead of asking for help solving business problems.

Scenario 1

"I need you to add a field to the opportunity for me. Let's call it "In Pipeline?" and make it visible to all reps. Basically, I need them to check that box whenever they think an opportunity is ready to be considered pipeline. I'll help you train the team on it, but your documentation should make it clear that opportunities with that box checked will show up in all of our pipeline reports, so make sure the opp is clean and all the fields we (CEO and I) pay attention to are populated."

Scenario 2

"We get a bunch of leads from marketing every month, but I don't really have visibility into what happens to all of them. Last month, I think we got around 1200 leads and I know we created 52 opportunities. What I don't know is how many of those were qualified and if we actually reached out to all of them. The VP of Marketing is on my case to get this sorted because he feels like we're wasting his budget by missing leads, and I can't figure out if he's right or not.

Maybe we need a couple checkboxes to track Qualified and Unqualified leads and maybe one that an AE/SDR checks after they have made contact? Do you think that would work?"

Need help hiring for RevOps?
Contact Taft Love: taft@icebergops.com