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COURSE BROCHURE

Revenue Operations Design, Quota Capacity and Handover Rules Training Course

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Rome

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Revenue Operations Design, Quota Capacity and Handover Rules Training Course

Ref: 2752_105202 **Date:** 14 – 18 June 2027 **Location:** Rome **Fees:** 6200 GBP

Revenue Operations Design, Quota Capacity and Handover Rules is a 1-week training course for sales operations, marketing operations and commercial finance staff who run the machinery behind revenue, and who leave with a revenue operations blueprint built on shared metrics. Growth now depends on marketing, sales and customer success acting as one revenue engine rather than three separate targets. Jupiter Prime Training offers this course in revenue operations design.

Why Revenue Operations Design Matters Now

Three groups pull on revenue design today. Boards and finance leaders want a revenue number that reconciles with bookings, billing and cash, not a figure each department defines differently. Sellers and account managers want quotas they believe are reachable and territories that are fair. Customers expect a smooth passage from first contact to renewal. A company that designs these links well hires sellers at the right pace and protects renewals; one that does not overstaffs, misses targets and loses accounts at handover. The course rests on the customer lifecycle revenue view, unit economics and capacity-based quota setting.

Who Gains Most from Revenue Operations Design

- Sales operations staff who set territories, quotas and compensation inputs
- Marketing operations staff who define lead stages and campaign attribution
- Commercial finance staff who reconcile bookings with recognised revenue and cash
- Customer success operations staff who manage onboarding, renewals and expansion
- Commercial analysts who build the shared revenue dashboards

A commercial leadership group gains most when its sales, marketing and finance operations members attend together and agree one set of definitions.

Revenue Operations Design Capabilities

Participants connect stage definitions, seller capacity and finance reporting into one operating design.

- Design shared stage definitions from first enquiry to renewal — the revenue leadership meeting
- Calculate seller capacity from ramp time, attrition and productivity — the hiring plan
- Specify quota and territory rules that tie to the revenue target — the commercial finance lead
- Build a forecast cadence with weekly calls and monthly reconciliation — the finance director
- Apply service level agreements to marketing, sales and success handovers — the customer
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Assess unit economics such as acquisition cost and payback — the investment decision on growth

Key Revenue Operations Design Terms

- Revenue operations — the function that aligns marketing, sales and customer success processes, data and targets around one revenue goal.
- Customer lifecycle revenue view — a view of the customer journey that continues past the sale into onboarding, adoption, renewal and expansion.
- Seller capacity — the revenue a sales team can realistically produce given headcount, ramp time, productivity and expected attrition.
- Handover service level agreement — a written rule stating when, how and with what information one team passes an account to the next.
- Net revenue retention — revenue kept from existing customers after expansion, contraction and churn, compared with the same customers a year earlier.
- Customer acquisition cost payback — the number of months of gross margin from a new customer needed to recover the cost of winning it.

Revenue Operations Design Day by Day

Day 1: The Revenue Engine and Its Owners

- Customer Lifecycle Revenue View — Seeing Acquisition, Retention and Expansion as One Flow
- Function Charter for Revenue Operations — Scope, Owners and Decision Rights
- Bookings, Billings and Recognised Revenue — Reconciling Commercial and Finance Views
- Revenue Data Dictionary — One Definition for Each Commercial Measure
- Technology Stack Inventory — Where Customer and Deal Records Live

Day 2: Funnel Stages and Shared Metrics

- End-to-End Stage Definitions — Entry and Exit Rules From Enquiry to Renewal
- Conversion and Velocity Measures — Locating Where Revenue Slows
- Unit Economics Set — Acquisition Cost, Lifetime Value and Payback Period
- Retention Measures — Gross and Net Revenue Retention by Segment
- Shared Revenue Scorecard — Choosing the Few Measures All Teams Report

Day 3: Quota and Capacity Planning

- Top-Down Target to Bottom-Up Capacity Bridge — Testing Plan Realism
- Ramp, Attrition and Productivity Assumptions — Sizing the Seller Headcount
- Territory and Account Segmentation — Balancing Opportunity Across Sellers
- Quota Allocation Methods — Historic, Potential-Based and Blended Approaches
- Compensation Plan Inputs — Linking Commission Rules to Revenue Quality

Day 4: Forecast Cadence and Handover Rules

- Forecast Categories and Call Rhythm — Commit, Best Case and Upside Discipline
- Forecast Accuracy Tracking — Comparing Calls With Closed Revenue
- Marketing to Sales Handover Agreement — Acceptance Criteria and Response Times
- Sales to Customer Success Handover — Deal Notes, Promises and Onboarding Start
- Renewal and Expansion Ownership Rules — Avoiding Gaps and Double Counting

Day 5: Practising the Revenue Operations Blueprint

- Case Company Stage and Scorecard Design — Applying Day 2 Definitions
- Case Capacity and Quota Model — Applying Day 3 Planning Assumptions
- Case Handover Agreement Set — Applying Day 4 Rules
- Operating Rhythm Calendar — Weekly, Monthly and Quarterly Revenue Meetings
- Revenue Operations Blueprint — Completing the Shared Metrics and Rules Pack

Applying Revenue Operations Design After the Course

- Run a definitions session with marketing, sales and finance to agree entry and exit rules for each stage
- Rebuild next quarter's quota allocation from a bottom-up seller capacity model and compare it with the top-down target

Revenue Operations Design Questions FAQ

What is revenue operations design and why does it matter now?

It is the design of shared stages, metrics, quotas and handover rules across marketing, sales and customer success. Boards now judge growth on retention and payback, which needs one aligned design.

Which roles gain most from revenue operations design?

Sales operations, marketing operations and commercial finance staff gain most. You benefit if you set quotas, own stage definitions or reconcile commercial figures with the accounts.

How does a revenue operations design course differ from a sales management course?

It focuses on the system behind selling rather than leading sellers. You work on capacity maths, data definitions, forecast rhythm and handover agreements, not coaching or negotiation.

What do you bring back from revenue operations design?

You bring back a blueprint for a case company: stage definitions, a shared scorecard, a capacity and quota model, handover agreements and an operating rhythm calendar.

Revenue Operations Design: The Way Forward

The revenue operations blueprint with its shared metrics first informs how many sellers to hire against next year's revenue target. Commercial leaders, finance and operations staff use it in every forecast and planning meeting. After its first quarter, revisit the handover rules where accounts stalled.