



Get Started
with Revegy -
Your Guide to
Sales Excellence



Introduction

Sales and revenue teams worldwide face the constant pressure of identifying potential revenue streams and efficiently realizing them to drive predictable growth. This is where Revegy steps in. As a leading provider of revenue intelligence technology, Revegy empowers sales teams to build deeper relationships with their most strategic accounts and identify their largest must-win deals.

Over the past 15 years, our innovative approach to intelligent account and opportunity planning has earned the trust of leading organizations across various industries, helping them manage over \$25 billion in strategic account revenue.

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Understanding Customer Revenue Optimization

Customer revenue optimization is a critical concept in modern sales enablement and revenue intelligence, encompassing the systematic processes and technologies that help organizations identify and realize revenue opportunities efficiently and predictably. At its core, customer revenue optimization focuses on maximizing the value of strategic accounts by providing sales teams with the tools and insights necessary to uncover unknown opportunities, prioritize efforts, and foster deeper relationships with key stakeholders. This approach is essential in today's competitive landscape, where the ability to drive sustainable revenue growth hinges on a company's capacity to make informed decisions and execute strategies with precision.

By leveraging customer revenue optimization, organizations can achieve greater predictability in their revenue streams, ensure more efficient use of resources, and ultimately enhance their overall sales performance. Reveyg's platform exemplifies this by enabling intelligent account and opportunity planning, thereby empowering sales teams to turn potential revenue into realized success.



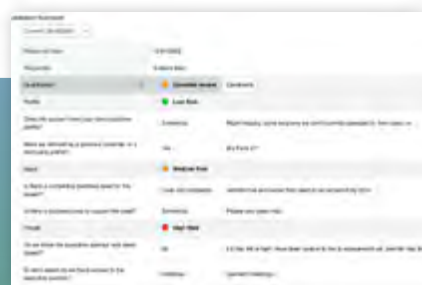
Revegy's Approach

Revegy is a complete revenue intelligence and sales enablement platform that allows sales teams to gain a deeper understanding of their accounts and unlock potential opportunities. Our vision is encapsulated in the mantra: “See the People, See the Priorities, See the Progress.” Let’s break that down.



See the People

With “See the People,” Revegy enables sales teams to visualize the network of relationships and influencers that drive the direction of their business, understanding how these individuals are connected and what they care about.



See the Priorities

“See the Priorities” helps teams understand their customers’ priorities and how their solutions can meet these needs, driving value-based interactions and identifying growth opportunities.



See the Progress

Finally, “See the Progress” focuses on driving account plan execution by identifying key goals for revenue, relationships, and customer success, ensuring that objectives and actions are aligned for accountability.

Organizations see the value from using Revegy because it empowers them to manage their most strategic accounts more effectively, driving predictable and sustainable revenue growth. By implementing Revegy, businesses benefit from enhanced visibility, strategic alignment, and actionable insights, leading to better decision-making and stronger customer relationships.

A photograph of a business meeting in a modern office. A man in a grey suit and blue tie stands, holding a white paper with a line graph, and looking at a group of four people seated around a wooden conference table. The seated individuals include a woman with long blonde hair, a woman with dark hair, and a man in a dark suit. A large green potted plant is in the background. A green rounded rectangle is overlaid on the bottom half of the image, containing white text.

Strategic Account Planning

Strategic Account Planning is a systematic approach businesses use to manage and grow relationships with key accounts crucial to long-term success. Revegy provides your teams with a blueprint to see the way to win.®

Our software helps account managers execute a repeatable methodology to identify growth potential and capture more spend in key accounts. In the complex B2B enterprise environment, Revegy reduces uncertainty by uncovering deep insights, guiding you to build compelling business cases and demonstrating how your solutions are vital to your customer's success.



Strategic Account Planning Value



Identify Critical Relationships

Engage with the right contacts. Revegy's sales account planning software helps account managers pinpoint key stakeholders and leverage organizational relationships to retain business and expand your footprint.



Unify Sales Planning Data

Access account information in one place. Revegy provides a consistent way to share intel, eradicate silos, remove blind spots, and improve cross-functional collaboration, ensuring that account management teams can react quickly and move opportunities forward.



Gauge True Account Sentiment

Know which accounts are at risk. Revegy's software helps you understand the true health of your accounts so you can provide the necessary coaching to prevent churn.



Set the Right Priorities

Accurately assess account potential. Revegy gives a clear view of high-value and long-term accounts, helping teams be more strategic and focus on those likely to drive near-term revenue.



Align with Customers' Objectives

Position your organization as a trusted partner. Revegy's tools help you understand your customers' key initiatives and goals, allowing you to offer solutions that drive real value.



Consistently Manage Accounts

Ensure each customer enjoys the same high-quality experience. Revegy aligns account management activities with customized playbooks, providing a clear framework for client service, retention, and expansion.

Strategic Account Planning Value



Steadily Push Opportunities Forward

Build a repeatable account planning process with Revegy, aligning account management activities to ensure each opportunity is quickly and consistently shepherded to close.



Maximize Productivity

Keep account managers on track and on target. Revegy turns arbitrary account management activities into focused strategies using data to predictably grow account revenue.



Socialize Success

Make reporting part of your regular workflow. Revegy provides easy-to-use and easy-to-share visualizations and reports.



Refine Your Approach

Manage accounts in real time. With Revegy, you can continuously optimize account plans as your data set grows and improves.



Grow Wallet Share

Use relationship maps to understand an account's broader organizational landscape, helping reps uncover other departments or business units that can benefit from your solutions.



Account Planning Journey



Key Strategic Planning Features



Relationship Maps

Revegy's Relationship Maps help you maintain and build relationships with key stakeholders by providing a clear understanding of the players and the internal politics that drive strategic decisions and revenue. This enables you to engage effectively with the right contacts and influence key decision-makers.

Customer Strategy Maps

Align your solutions with customer initiatives most likely to drive value and receive funding. Revegy's Customer Strategy Maps offer insights into your customers' key goals and priorities, allowing you to position your offerings as integral to their success and secure necessary buy-in.





Whitespace+

Identify the optimal path to upsell and cross-sell revenue based on your product footprint, competitive position, and revenue potential across business units, product lines, or other segments. Revey's Whitespace+ feature uncovers hidden opportunities within your accounts, helping you maximize revenue growth.

Internal Action Plan

Coordinate and collaborate on the goals, objectives, and activities that drive successful plan execution. Revey's Internal Action Plan ensures all team members are aligned and working towards common objectives, improving efficiency and increasing the likelihood of achieving your strategic goals.



Revenue Growth Ideas

Identify, develop, and collaborate on pre-opportunity "ideas" for driving revenue growth. Revey's platform facilitates brainstorming and strategic planning, helping you uncover innovative ways to generate additional revenue before formal opportunities arise.





Opportunity Planning and Execution

Opportunity planning and execution is a systematic process used by sales teams to identify, develop, and close sales opportunities effectively. This approach ensures that each potential deal is thoroughly analyzed, strategically approached, and efficiently managed through each stage of the sales cycle.

Revegy's sales opportunity management technology makes it easy for representatives to manage the end-to-end sales cycle, increasing conversions and accelerating lead-to-close times. In fast-moving enterprises with deals at various stages of the pipeline, Revegy's software enables sales teams to leverage data-backed workflows and account insights, enhancing sales efficiency, optimizing time management, assessing risks, and focusing on the right deals at the right time to move opportunities forward strategically.

Revegy can be used by all organizations - both those with a set up sales process and those who need assistance in implementing one.

Opportunity Planning and Execution Value



Monitor Your Sales Funnel

Leverage real-time dashboards and analytics to gain better visibility into your sales pipeline. Quickly identify pipeline bottlenecks and opportunities with a high chance of closure.



Push Opportunities Forward

Build a repeatable sales process that's purpose-built for your sales methodology and opportunities management, aligning sales team activities and ensuring each opportunity is quickly and consistently shepherded from prospect to close.



Identify Key Stakeholders

Decrease cycle time by ensuring reps are engaging with the right contacts. Understand who has authority, pinpoint influencers, leverage champions, and expand your reach within the buying team.



Create Customer-Centric Business Cases

With sales opportunity management software, identify key value drivers such as price, quality, and service for buying audiences, empowering reps to build compelling business cases and position solutions as “the choice” not “a choice.”



Gain Opportunity Health Visibility

Know which opportunities are at risk and which are ripe to close, with sales lead management software, ensuring deals don't stall and prompting reps to take the initiative when an account is most ready to buy.



Conserve Sales Resources with Lead and Opportunity Management

Pay attention to buy signals and rely on your marketing team to warm-up accounts and engage with the ones that are not yet ready to buy.



Eliminate Cross-Team Friction

Store all account data in one place and eradicate silos between sales, marketing, finance, and more to improve collaboration and streamline handoffs, ensuring sales teams can optimize their reaction time and move deals forward quickly.



Expose New Opportunities

Use real-time account intelligence to spot new players, grasp new trends, and identify cross-sell opportunities.



Avoid Pipeline Gaps Early

Identify holes in real time and make informed decisions to close gaps and keep your team on track and on target.

Key Opportunity Planning Features



Guided Selling Playbooks

Drive consistent sales processes and methodology to accurately qualify and accelerate deals.

Opportunity Close Plans

Ensure reps understand and plan all the critical events and tasks required to successfully win the deal.

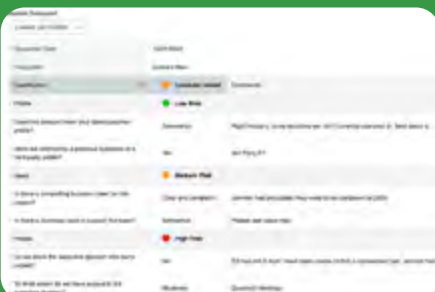


Stakeholder Influence Maps

Gain a deeper understanding of the players and the politics to ensure reps' have buy-in from key stakeholders and the votes they need to win.

Value (Business case) Maps

Align your solutions to critical client needs/priorities to demonstrate value that creates a compelling business case and drives deals to close.



Qualification Scorecards

Ensure reps, managers and executives are assessing opportunities consistently to accurately gauge risk and probability of winning.



Implementation Process

Project Management

Change Management

- 1** Pre-Implementation
(Project KickOff & Planning)
- 2** Solution Walk-through
(Design, Configuration, Testing)
- 3** Educate
(Training & Communication Plan)
- 4** Deploy
(Go Live)
- 5** Optimisation
(Ongoing reviews)

Case Studies and Success Stories

Annual account plans at Siemens were scattered across various PowerPoint templates, making it difficult for Strategic Account Managers to execute from these disparate documents. They needed a better way to collaborate with their teams. Siemens PLM implemented Revegy's account and opportunity planning tools, including relationship maps, strategy maps, and account/opportunity plans. These tools provided corporate-wide access to the same information on a collaborative platform, enhancing team collaboration and execution.

"Revegy helps us determine where the customer is going with their business, and how we can help them get there. And that's our goal, to help our customers achieve their objectives."

- Charlie Jonesrebandt Director,
Process Alignment and Integration, Siemens PLM Software



A man with dark hair and glasses, wearing a dark suit, white shirt, and a dark tie with small white dots. He is holding a black folder or portfolio under his left arm. The background is a bright, out-of-focus office interior.

See More From Our Customers

“We increased win rates more than 50% by improving deal execution and qualifying out of bad deals earlier.”

— Sales VP, leading global cloud application and platform services company.

“Revegy gave us a clear line of sight into strategy execution. Because of this, Fujitsu reduced the sales cycle by 43 days.”

— Sales VP, leading global cloud application and platform services company.

“One of the biggest benefits we’ve seen using Revegy is related to revenue predictability. We’ve seen a 25% improvement in forecast accuracy.”

— Sales VP, leading global cloud application and platform services company.

A background image showing three business professionals in an office. A man in a dark suit is leaning over, looking at a device held by a woman in a blue blazer. Another woman with blonde hair is partially visible on the left, also looking towards the device. The office environment is blurred in the background.

About Revegy

Revegy is a revenue intelligence and sales planning platform designed to help organizations manage and optimize their complex sales processes. The Revegy platform is a game-changing source of insight for sales teams, helping them build trusting relationships within the key accounts that fuel revenue.

Founded in 2005, Revegy helps sales teams streamline sales processes, increase revenue, and create a predictable pipeline using our account planning and execution solution. More than 50,000 users from industry-leading companies like Siemens, Comcast, and Worksoft rely on Revegy to manage over \$30 billion in revenue.

For more information about how to win more deals, faster, visit revegy.com