



The Four Ps of Revenue Protection

A Revenue Playbook for Ops Pros

What is Revenue Protection?



In the early days of operations (circa 2015), ops pros were given one primary charge: grow more revenue and scale using automation, like bees buzzing from flower to flower, gathering more nectar to produce honey.

Then came 2023.

Economic conditions took a downward trend, spawning layoffs and tech stack consolidations. The bees are now tasked with guarding the hive and all the precious honey they have so diligently produced.

This is revenue protection.

As a result, the RevOps team here at LeanData is doing things a bit differently. We're still focusing on revenue generation, but now also investing our time in a revenue protection strategy.

We call this shift the four Ps.

This guide will share the signals, plays, and strategies you need to protect your company's revenue.

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Number One: People Intent



People Intent

It's the Ops Pros' responsibility to collect all the intent signals coming in and convert those signals into actions internal teams can take. Intent signals bring clarity to what our customers may be thinking — things they may not disclose at a scheduled account check-in.

Are customers giving you any early warning signs of intent?



Intent to churn



Researching your competitors



Reading articles on your website for more education

INTENT SIGNAL REVENUE PLAY

The LeanData RevOps team uses 6sense, G2, Clearbit, and our platform's automated Slack alerts to orchestrate powerful plays that identify customers who are manifesting intent signals.

The Slack alerts contain rich contextual details like buying stage, profile fit, keywords researched, and number of won or lost opportunities along with specific calls to action so account managers and customer service managers know what to do next.



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Number Two: People Movement



People Movement

In a job market where 2.5% of workers (about 4 million) switched jobs each month in 2022, it's important to know if you have the right people in the customer account, and know if they are moving. Key stakeholders and points of contact are critical to retaining your business.

Former customers refer more people, promote your business, and have a higher chance of converting. They already have a good understanding of your product and don't need the education or extensive meetings characteristic of the typical SaaS sales process.

Tracking your customers' movement, whether internally or externally, is another great way to protect revenue.

The RevOps team should alert reps or CSMs whose Account points of contact have:



✓ Moved on to another company

✓ Changed jobs internally

✓ Received a promotion

PEOPLE MOVEMENT REVENUE PLAY

The LeanData RevOps team uses the LeanData Routing Scheduler to automatically create or update new records for job changes detected by UserGems.

Then, LeanData automates Slack alerts to the appropriate AE, SDR, or CSM with context and the appropriate call to action.



REVENUE TIP

Why not congratulate these contacts and send a gift, preserving that relationship?

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Number Three: Partnerships



Partnerships

At LeanData, our product works really well with our integration partners, so it's important to know where customers overlap. This creates opportunities to drive value and synergies across the two products or platforms.

Knowing where customers overlap creates opportunities to drive value. When a partner is involved:



Deals close 46% faster



Deals are 53% more likely to close

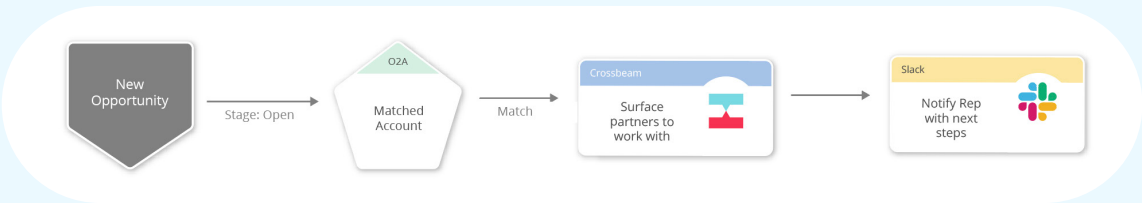


Your products become more sticky

PARTNERSHIP REVENUE PLAY

The LeanData RevOps team uses our Crossbeam integration node to automate partnership revenue plays.

LeanData automation will identify partner relationships, create a task in Salesforce to initiate collaboration, and send a Slack notification to the sales rep with next steps.



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Number Four: Product



Product

Product usage is another valuable source of information that supports our efforts at revenue protection. The LeanData RevOps team looks for any signals from our product that would indicate we need to have a conversation with our customers.

With specific parameters in place, these signals trigger the LeanData platform to alert the CSM and AM on customer product usage and the appropriate next steps.

Product data usage can signal:

A potential upsell



A customer needing education & training



A need for contract adjustments



PRODUCT REVENUE PLAY

If a customer is under-utilized, consider adjusting their contract and meet them where they're at. When the economy picks up, you'll be right there with them. Adjusting protects your revenue for the future rather than fully churning.

If your customer has layoffs, call them and ask how they're doing. Be a business partner, not a check-taker. Show your customers how you are protecting your revenue and share your advice.

The LeanData RevOps team uses LeanData automation to monitor customer usage. When users either exceed usage or there's a significant underutilization, LeanData creates an Overage Opportunity in Salesforce and routes the opportunity to the AM, or creates a task for the AM to begin a discussion with the customer.

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Prepare Your Team for Better Days Ahead



Prepare Your Team for Better Days Ahead



For Ops Pros, it's invaluable to know how to scale and know when to pull back. In a down market, priorities shift in RevOps: our spending, the size of our team, and where we allocate our time. While the four Ps may sound like revenue generation, here at LeanData, these four pillars serve as revenue protection.

Ops pros have to be responsive, but also make sure that our response doesn't limit us down the road. So, in preparation for the up economy (which always follows a down economy), consider cleaning house.

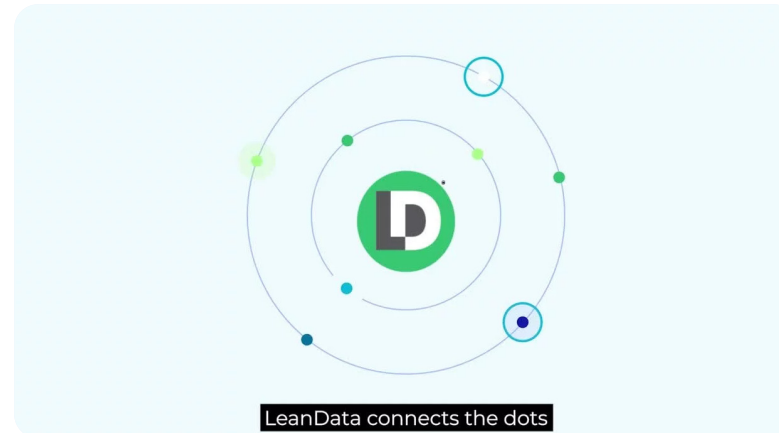
Check the foundation of your tech stack and processes so that when things pick back up, you'll be ready.

Recommended Resources



VIDEO

OpsStars Unplugged: Navigating the Revenue Engine in Turbulent Times



VIDEO

LeanData Demo in 100 Seconds



CUSTOMER STORY

Snowflake Scales Account Based Plays with LeanData Revenue Orchestration

Get Started Today:

Visit [LeanData.com](https://leandata.com) to learn more about LeanData's go-to-market operations solutions for Automated Scheduling, Matching, Routing and Engagement, or visit us on [AppExchange](https://appexchange.com/apps/LeanData).

[Request Demo](#)

Why LeanData?

Today's growth leaders power their B2B selling with LeanData, the gold standard in modern revenue orchestration and an essential element of the modern RevTech stack. The LeanData Revenue Orchestration Platform, powered by No-Code Automation, simplifies and accelerates coordination of all the people, processes and plays needed to transform buyer signals into buying decisions. LeanData is inspiring a global movement among its 1,000+ customers and community of 5,000+ OpsStars worldwide, empowering them with revenue operations excellence that translates into compelling buyer experiences and competitive advantage.



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