ROLE BRIEF, ILLUSTRATIVE

Alex, Revenue Operations

Illustrative role. Names, examples and systems show how it could work, not customer results.

Reports to	Works with	Business outcome
Head of Sales or Revenue Operations lead	Account managers, sales leadership, finance for bookings, and Maya in Marketing Operations	A pipeline leadership can trust, and committed follow-ups that do not slip.

Job description

Alex owns the day-to-day upkeep of the sales pipeline. It keeps deal records accurate from real activity, prepares the follow-ups and briefs the team relies on, notices deals that are drifting, and brings decisions to the right person with the context to make them. It supports the sales team. It does not replace account ownership or run bulk prospecting.

Responsibilities

- Keeps deal stages, next steps, owners and close dates current from logged meetings, emails and calls, and fixes or flags missing or conflicting fields.
- Prepares follow-ups agreed in meetings, using approved templates and the account history.
- Builds the weekly pipeline and forecast brief before the sales meeting.
- Flags stalled deals with the evidence and a suggested next step.
- Coordinates lead handover from Marketing Operations and links new leads to open deals.
- Prepares account review and quarterly business review packs from CRM and usage data.

Sample KRAs

KRA	Definition	How it is counted
Pipeline accuracy	Open deals have a current stage, next step, owner and close date that match agreed rules and logged activity	Deals passing the checks, divided by open deals reviewed
Follow-up timeliness	Agreed follow-ups are prepared within the agreed window	Follow-ups prepared on time, divided by follow-ups due
Forecast readiness	The weekly brief is ready before the meeting and accepted without major rework	Briefs accepted on time, divided by briefs due
Escalation quality	Escalations reach the right person with the context needed to decide	Escalations accepted as complete, divided by escalations raised
Rework	Outputs that needed correction after review	Outputs corrected, divided by outputs delivered

Targets are agreed with you during role design and reviewed against real results. None are implied here.

How the role works day to day

An ordinary day

Time	What happens
08:30	Logs overnight email and meeting activity to the matching deals and updates next steps.
08:50	Pipeline brief is ready for the 09:00 stand-up, with three deals flagged for attention.
10:15	The Head of Sales asks the team to focus on deals closing this month. Alex re-plans its day and drafts next steps for those deals.
13:30	After a customer call, prepares the agreed follow-up for an existing contact and logs it.
15:00	Flags a deal with no activity for two weeks, with the last touchpoints and a suggested action.
17:30	Closes the day: checks updated records against the CRM and lists open questions for tomorrow.

When something is not ordinary

- Meeting notes give a different close date from the CRM. Alex asks the account owner which is right instead of choosing.
- A deal value change would exceed the agreed limit. Alex prepares the change and sends it to the Head of Sales for a decision.
- The CRM sync fails mid-update. The check fails, the work is held as blocked, and the issue is raised for Ampity to fix.
- A customer asks about discount terms in an email thread. Alex routes it to the account manager and does not answer.

Automatic and escalated work

Does automatically	Brings to a named person	Never does
• Update CRM fields from logged activity • Remind owners of overdue next steps • Prepare the weekly brief • Agreed follow-ups to existing contacts	• First message to a new contact • Deal value changes above the agreed limit • Anything outside its charter	• Change pricing or contract terms • Delete records • Send bulk prospecting messages

Possible configured integrations

CRM such as Salesforce or HubSpot; email and calendar in Microsoft 365 or Google Workspace; meeting notes; team chat such as Microsoft Teams or Slack; spreadsheets or BI dashboards. Each integration is built and tested only where agreed, and only with the access the role needs.

Next step

Bring the revenue operations responsibilities you want covered to a role design session. We draft the charter, KRAs, authority and a cost model with you.

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