

# RevOps Maturity Checklist

50%+ of RevOps initiatives fail due to misaligned teams, bloated systems, and unclear processes. Score yourself using HIVE Strategy's STICKY framework to uncover your maturity level and what to fix.



## 1. Spot the Need

Do you know where your revenue process is breaking down?

- ☐ We have documented processes across sales, marketing, and CS
- ☐ Everyone understands and uses lifecycle stages consistently
- ☐ Funnel leakage is tracked and acted on
- ☐ We clean and structure our data regularly

Score: \_\_\_\_ / 20

## 2. Trigger the Next Step

Are your handoffs seamless and your workflows automated?

- ☐ Handoffs are mapped and automated
- ☐ SLAs or “rules of engagement” exist between teams
- ☐ Every lead or ticket has a next step
- ☐ Nothing sits idle in your pipeline

Score: \_\_\_\_ / 20

## 3. In-Context Enablement

Does your team have the guidance they need right where they work?

- ☐ Resources are embedded into tools (not buried in docs)
- ☐ Reps get just-in-time guidance
- ☐ “How do I...” questions are decreasing
- ☐ New team members onboard quickly

Score: \_\_\_\_ / 20

## 4. Connect to Resources

Are your systems working with you, or against you?

- ☐ CRM, marketing, and CS tools are integrated
- ☐ All tools have clear owners and usage guidelines
- ☐ Everyone is trained on the tech they use
- ☐ We avoid tool sprawl and tech bloat

Score: \_\_\_\_ / 20

## 5. Keep It Simple

Are you optimizing or over-engineering?

- ☐ We review and simplify processes quarterly
- ☐ Unused fields, lists, and workflows are archived
- ☐ We prioritize high-impact changes, not busywork
- ☐ We measure what matters—not what's easiest to track

Score: \_\_\_\_ / 20

## 6. Your Team Activated

Is your team aligned, accountable, and using data to drive action?

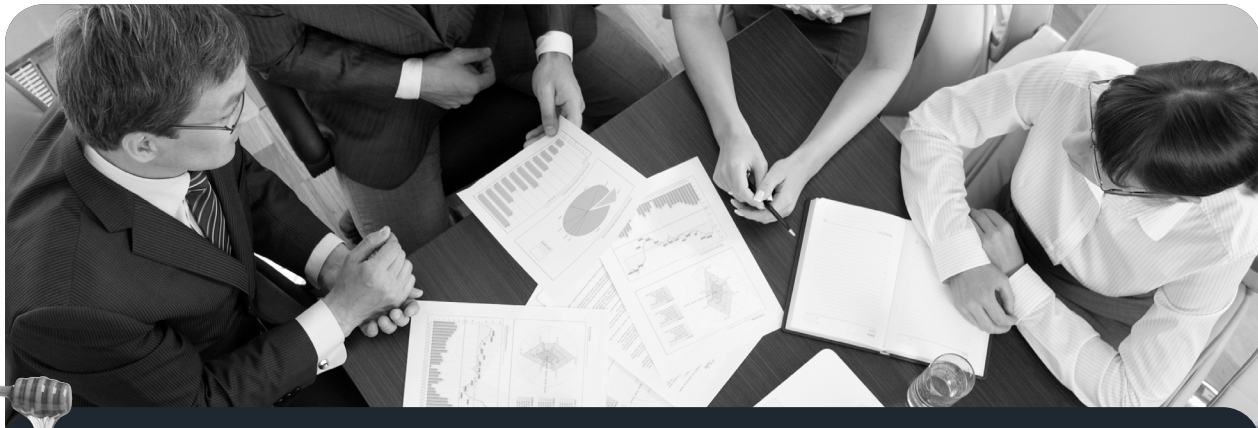
- ☐ Sales, marketing, and CS align on shared KPIs
- ☐ We forecast based on data we trust
- ☐ Dashboards show a full-funnel view
- ☐ Leadership buys in to RevOps goals

Score: \_\_\_\_ / 20



## Where Do You Land?

Score	Maturity Level	Reality Check
0-40	Tactical Chaos	Silos, reactivity, and inconsistent performance. You're running uphill.
41-70	Emerging Ops	You're making progress, but critical gaps still cost time and revenue.
71-100	Integrated Engine	You're structured and scaling, but enablement and adoption may still lag.
101-120	Strategic RevOps	Cross-functional alignment, embedded training, and clean data fuel your growth.



### Want to Make Your RevOps STICKY?

Our STICKY methodology embeds training, eliminates friction, and aligns your teams around clean, simple, scalable processes—right inside HubSpot and beyond.

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