WILLIAM FLAIZ

Marketing Ops vs. RevOps

What Do You Actually Need?

A Diagnostic Assessment

Before you reorganize, hire, or buy new technology,
answer these 25 questions to diagnose what your organization actually needs.

Time to complete: 15 minutes   **Scoring guide:** Page 6

How to Use This Assessment

Most companies misdiagnose their operational challenges. They ask 'Do we need Marketing Ops or RevOps?' when they should ask 'What problem are we actually solving?'

This assessment helps you diagnose the root cause before making expensive organizational or technology decisions. Answer each question honestly based on your current state, not where you want to be.

Scoring Instructions

1. For each question, check the box if you can answer 'Yes' or 'We have this'

2. At the end of each section, count your checked boxes and record your score

3. Transfer your section scores to the Results page

4. Use the interpretation guide to identify your priority areas

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What This Assessment Reveals

• Whether your foundation is solid enough to support organizational change

• Which area needs attention first: data, process, technology, or structure

• Whether you need Marketing Ops, RevOps, or something else entirely

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Section 1: Data Foundation Health Check

Your data is the foundation everything else builds on. If this is broken, no organizational structure will save you.

1. ■ We have a single source of truth for customer data that sales, marketing, and customer success all use

2. ■ We know what percentage of our CRM records are duplicates (and it's under 5%)

3. ■ We can trace a customer from first anonymous touch through closed deal through renewal without losing visibility

4. ■ Someone has audited our data for accuracy (not just completeness) in the last 6 months

5. ■ We have documented data governance policies that are actively enforced

6. ■ New data entering our systems goes through validation rules before it's saved

Score: _____ / 5

Section 2: Process Maturity Evaluation

Most operational friction comes from undefined or inconsistent processes, not wrong org charts.

1. ■ We have documented definitions for lead stages that sales and marketing both agree on

2. ■ Handoffs between marketing and sales follow a defined, documented process

3. ■ When leads get stuck in the funnel, we know exactly where and why

4. ■ Our campaign execution process is documented and repeatable (not dependent on tribal knowledge)

5. ■ We have SLAs for lead follow-up that are tracked and enforced

Score: _____ / 5

Section 3: Technology Utilization Audit

Organizations use only 33% of their MarTech capabilities. Before buying new tools, are you using what you have?

1. ■ We have conducted an audit of our MarTech stack in the last 12 months

2. ■ We can identify which tools have overlapping functionality (and have a plan to consolidate)

3. ■ We actively use the advanced features of our core platforms (not just basic functionality)

4. ■ Our marketing automation platform and CRM are properly integrated with bi-directional data flow

5. ■ We have eliminated or are actively working to eliminate tools that no one uses

Score: _____ / 5

Section 4: Cross-Functional Alignment Score

This section determines whether organizational restructuring would actually help or just shuffle the deck chairs.

1. ■ Marketing and sales have shared goals and metrics they're both accountable for

2. ■ Customer success has visibility into marketing campaigns and sales conversations

3. ■ We have regular cross-functional meetings that result in action items (not just status updates)

4. ■ When a deal closes or churns, all teams can see the full history of that customer

5. ■ Attribution disputes between marketing and sales are rare (we have agreed-upon models)

6. ■ Revenue forecasting includes input from marketing, sales, and customer success

Score: _____ / 5

Section 5: Organizational Readiness

Even if RevOps is the right answer, are you ready to implement it successfully?

1. ■ Leadership understands that RevOps is about process unification, not just headcount consolidation

2. ■ We have executive sponsorship for cross-functional operational changes

3. ■ Our underlying ops functions (Marketing Ops, Sales Ops, CS Ops) are mature enough to unify

4. ■ We have budget allocated for organizational change management (not just the new hire)

5. ■ We're willing to standardize processes across teams even if it means some teams lose autonomy

Score: _____ / 5

Your Results

Transfer your section scores below:

Section	Your Score	Max Score
1. Data Foundation	___	6
2. Process Maturity	___	5
3. Technology Utilization	___	5
4. Cross-Functional Alignment	___	6
5. Organizational Readiness	___	5
TOTAL	___	**27**

Interpretation Guide

0-8 Points: Fix Your Foundation First

Your data and processes need significant work before any organizational change will help. Focus on data cleanup, documentation, and basic operational hygiene. Hiring a RevOps leader now would mean paying them to fight fires instead of optimize.

9-16 Points: Address Gaps Before Restructuring

You have some operational maturity but critical gaps remain. Identify your lowest-scoring section and prioritize improvements there. Consider hiring Marketing Ops first to shore up foundations before expanding to RevOps.

17-22 Points: Ready for Strategic Discussion

Your foundation is solid. Now the Marketing Ops vs. RevOps decision becomes relevant. Look at your Section 4 score: if it's 4+ you may benefit from RevOps. If under 4, strengthen cross-functional alignment before reorganizing.

23-27 Points: Optimize and Scale

Strong operational maturity across the board. Your question isn't 'what do we need?' but 'how do we scale what's working?' Consider RevOps if you want unified metrics and accelerated growth. Your foundation can support it.

Your Priority Action Based on Lowest Section

Lowest Score: Section 1 (Data Foundation)

Start with a comprehensive data audit. Identify duplicates, map data flows, and establish governance policies. Consider tools like CleanSmart for automated data cleanup before any other investment.

Lowest Score: Section 2 (Process Maturity)

Document your current-state processes, identify handoff failures, and create SLAs. Process mapping workshops with cross-functional teams often reveal quick wins.

Lowest Score: Section 3 (Technology Utilization)

Audit your MarTech stack. Identify redundancies, unused licenses, and integration gaps. Most companies can cut 20-30% of MarTech spend while improving performance.

Lowest Score: Section 4 (Cross-Functional Alignment)

Create shared metrics and regular cross-functional forums. Start with a single shared KPI that marketing, sales, and CS all own together. Build from there.

Lowest Score: Section 5 (Organizational Readiness)

Invest in change management and executive alignment before reorganizing. RevOps fails when leadership thinks it's just a cost-cutting consolidation play.

Need Help Interpreting Your Results?

I work with enterprise marketing and operations teams to diagnose root causes and build sustainable operational foundations. If your assessment revealed gaps you're not sure how to address, let's talk.

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About the Author

William Flaiz is a digital transformation executive and former Novartis Executive Director who has led consolidation initiatives saving enterprises over $200M in operational costs. He specializes in helping pharmaceutical and healthcare companies align MarTech with customer-centric objectives.