

# RevOps Bulletin

NEWSLETTER | NOVEMBER 2024

## Having a CRM dictates how well your business performs. Don't believe us? Read on.

According to this *survey by Freshworks*, businesses that use a CRM are 86% more likely to exceed their sales goals than companies that don't.

Those aren't rookie numbers. Most CRMs have enormous potential to streamline customer and revenue data to produce the right directional push.

The lost opportunity cost of not implementing a CRM to its full potential can be too high. This is why an average business owner can greatly benefit from knowing the ins and outs of their CRM to fully tap into what it can do for them.



### INFOGRAPHIC

#### Avoid these mistakes for an optimized CRM setup

A well-implemented CRM setup is a must for preserving customer relationships and streamlining the flow of crucial data across teams. Learn common mistakes people make and how to avoid them.

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### BLOG

#### Eliminating silos: Aligning sales & production teams

Misalignment between sales and production teams in a manufacturing business can have several consequences that hinder revenue growth. Find out how implementing RevOps principles can help.

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### BLOG

#### Do this to achieve maximum lead management efficiency

An optimized lead management system can do wonders for your sales pipeline. But how do you devise such a system, sidestep possible errors, and choose what tools to use? In this blog, we find out.

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### CASE STUDY

#### Integrating HubSpot-Stripe for a centralized database

100 Club of Mass struggled with a disjointed payment system that did not properly document historical data. Learn how migrating from DepositFix to Stripe helped them fix their problem.

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## HubSpot product updates: hot & crisp

### You can now use regular expressions for property validation

In this massively important update, HubSpot will now allow users to improve data integrity with the help of regular expressions.

This feature will avoid incorrect data entries by enforcing certain formats, such as using only five digits for postal codes. Thus, users will save significant time sorting through bad-quality data.

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### HubSpot will now use AI to generate details for documents

Sales reps are often overwhelmed by the hundreds of documents they have to manage in a CRM. It is crucial to send contextually relevant documents such as case studies and supporting articles to prospects during a deal. However, with a large library of content, that becomes complicated.


HubSpot has recently rolled out a new update that uses AI to generate details for each document and its contents. This feature allows Sales reps to quickly scan what they are looking for and work more efficiently.

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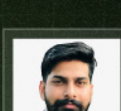
### REVPERT ACADEMY

## RevOps lessons on-the-go for busy professionals

Do you feel held back by your work commitments and do not have enough time to upskill? Our lessons are designed to help you get ahead of the curve without sacrificing time from your busy work schedule.



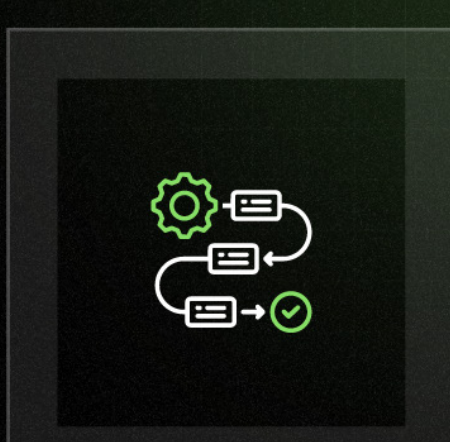
## HOW TO USE AI TO CREATE WORKFLOWS IN HUBSPOT



INSTRUCTOR:

Pankaj Goyal

RevOps Expert



Our bite-sized videos are info-rich and can help you learn about important RevOps concepts in just a couple of minutes every day.

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"They are great to work with. They have jumped on every task that has been asked of them and have exceeded expectations. We have gone over our normal quoted time and keep adding on more project work."

— Antonietta MacKenzie  
VP, Marketing & Operations, Idegy



"RevX knows what they are talking about and they're humble enough to recognize on the rare occasions when they don't. No project is beneath them if it helps the client, and they're deeply committed to delivering excellence to their customers."

— Dan Klos  
CEO & Co-founder, Outco

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