

RevOps Candidate Evaluation Framework

RevSearch evaluates RevOps candidates across both core technical competencies and emotional intelligence. Because the best RevOps leaders don't just build systems, they drive adoption, influence stakeholders, and think end-to-end across the full revenue cycle.

Every evaluation is built on three foundational layers:

1

Business Context Fluency

Can they diagnose the GTM model and connect it to RevOps priorities?

2

Four Pillars of RevOps

Do they think across Process, Technology, Data, and People?

3

Full Lifecycle Revenue Model

Do they think end-to-end: lead-to-close, onboarding, retention, expansion?

THREE SCORECARDS CALIBRATED TO BUSINESS STAGE

Strategic IC: The Systems Builder

- First RevOps hire as a company moves away from founder-led sales (typically \$10–30M)
- Solo operator building RevOps from scratch in a lean, high-growth environment
- High-autonomy generalist who owns process, tech, data, and vendor relationships end-to-end

Team Builder / Director: The Emerging Leader

- Company has outgrown a single IC and needs someone who can build and scale a team
- Director-level hire who still gets hands dirty but can also coach, delegate, and influence cross-functionally
- Requires PE-grade reporting, forecast accuracy, and cross-functional process discipline
- Often brought in during rapid growth or to professionalize operations ahead of an exit

VP: The Executive Operator

- Larger or more complex businesses needing a true executive RevOps voice at the leadership table
- Buy-and-build environments where M&A integration, org design, and board communication are critical
- Companies with multiple product lines, GTM motions, or post-acquisition complexity requiring enterprise-scale thinking

Featured Scorecard: Strategic IC

The Systems Builder | High-autonomy generalist who owns RevOps end-to-end in lean, high-growth environments

CORE COMPETENCIES

#	Competency	Wt	Key "Look Fors"
1	Business Context Fluency	1.5x	Curious about GTM model, product, ICP; asks diagnostic questions early; understands how business context drives RevOps decisions
2	SaaS Metrics & Strategic Insight	1x	Deep command of SaaS metrics (NRR, LTV:CAC, ARR, churn); connects metrics to business strategy; identifies leading vs. lagging indicators
3	Process & Workflow Design	1x	Designs scalable workflows across lead-to-opp, opp-to-close, onboarding, and expansion; identifies handoff friction between stages
4	Technology & Systems Strategy	1x	Owns full RevTech stack; makes build/buy/integrate decisions with ROI lens; maps tech to revenue lifecycle stages
5	Data, Analytics & Insights	1x	Defines metrics at each revenue stage; builds forecasting models leadership trusts; ensures data quality and governance
6	PE/Board Stakeholder Communication	1x	Comfortable presenting to PE partners and board; translates ops into investor language
7	Strategic Planning & Prioritization	1x	Builds roadmaps aligned to company strategy; connects RevOps initiatives to value creation
8	Personal Bandwidth & Vendor Mgmt	1x	Manages own capacity effectively; leverages consultants/contractors strategically
9	M&A Execution Support	1x	Can support due diligence; executes system migrations and data integrations hands-on
10	Adaptability & Scrappiness	1x	Thrives in ambiguity; moves fast; comfortable operating without a team; builds with limited resources

EMOTIONAL INTELLIGENCE

#	Competency	Key "Look Fors"
1	Executive Presence & Credibility	Commands respect in senior meetings; speaks confidently without arrogance
2	Navigating Ambiguity Solo	Makes decisions without all information; comfortable being the only RevOps voice
3	Delivering Difficult Truths	Presents data that challenges leadership assumptions; diplomatic but direct
4	Systems Thinking & Ripple Effects	Thinks in terms of upstream/downstream impacts; identifies second-order consequences
5	Stress Management & Sustainability	Manages high workload without burning out; sets boundaries appropriately

Featured Scorecard: VP

The Executive Operator | Experienced leader who scales teams, drives PE-grade reporting, and operates at the executive level

CORE COMPETENCIES

#	Competency	Wt	Key "Look Fors"
1	Business Context Fluency	2x	Teaches team to start with business context; systematic discovery for new businesses; educates board on GTM-to-RevOps implications
2	SaaS Metrics & Value Creation	1x	Drives measurable improvement in metrics that affect valuation (NRR, LTV:CAC, Rule of 40); understands what buyers look for
3	Process Optimization at Scale	1x	Designs processes that scale across revenue stages; ensures seamless handoffs between marketing, sales, and CS
4	Technology & Systems Strategy	1x	Sets RevTech vision and roadmap mapped to lifecycle; manages significant tool investments; drives adoption at scale
5	Data Strategy & Forecasting	1x	Owens forecast accuracy; builds data governance; creates reporting frameworks used across the org and by the board
6	Executive & PE Stakeholder Influence	1.5x	Presents to C-suite and board regularly; trusted advisor to PE partners; translates complex operations into investor language
7	Org Design & Talent Strategy	1x	Builds high-performing teams structured across process, tech, data, and people; develops leadership bench
8	M&A Due Diligence & Integration	1x	Leads RevOps due diligence; designs integration strategies across process, tech, data, and people
9	Change Leadership at Scale	1x	Leads enterprise-wide transformation; manages through acquisitions, pivots, and restructures
10	Strategic Planning (PE Lens)	1x	Aligns RevOps strategy to PE value creation goals; plans for exit scenarios; thinks about exit readiness

EMOTIONAL INTELLIGENCE

#	Competency	Key "Look Fors"
1	Board & Investor EQ	Reads the room in board settings; knows when to push and when to defer; builds trust with PE partners
2	Team Emotional Leadership	Reads team morale; addresses issues before they escalate; creates psychological safety
3	Cross-Functional Conflict Resolution	Navigates Sales/Marketing/CS tensions; finds win-win solutions across revenue lifecycle stages
4	Systems Thinking & Ripple Effects	Thinks about upstream/downstream impacts across the full enterprise; balances competing priorities
5	Crisis Leadership & Composure	Stays calm in crisis; makes clear decisions under pressure; communicates confidently at highest stakes
6	Self-Awareness at the Executive Level	Knows own blind spots; actively seeks feedback; adjusts leadership style based on context

Our Evaluation Methodology

Each scorecard goes well beyond these competency overviews. Our specialized vetting process sources leaders who combine operational depth, private equity fluency, and the EQ to drive transformation. Here's what sits behind the competencies you've seen in this document.

WHAT SITS BEHIND EACH COMPETENCY

Behavioral Interview Questions

Role-specific, scenario-based questions designed to surface real experience, not rehearsed answers. Calibrated to company stage and PE context.

Green & Red Flag Indicators

Specific signals that distinguish top-tier candidates from those who interview well but underperform. Built from numerous placements across diverse portfolio companies.

Weighted Scoring System

Not all competencies matter equally. We work with our clients to determine what weighting is required to match their business model and GTM strategy.

Cross-Competency Pattern Recognition

Our interviewers identify how answers across competencies connect. A data question often reveals more about systems thinking than an EQ answer does.

THE FOUR PILLARS OF OUR VETTING PROCESS

Revenue Operations Expertise

We specialize in RevOps, period. We deliver A-players who bring end-to-end, lead-to-cash expertise and domain knowledge across the entire revenue funnel.

Private Equity Domain Mastery

Our candidates have PE-backed growth expertise. We find leaders with a track record of delivering visibility, metrics, and KPIs where accountability is critical.

Emotional Intelligence Emphasis

We prioritize leaders with the "secret sauce" to drive adoption: individuals who excel at change management, influencing stakeholders, and creating alignment.

Ops Assessment Requirement

We evaluate candidates with qualitative and quantitative tests of their analytical chops: spotting trends, diagnosing data hygiene, and turning KPIs into stories.

CUSTOM EVALUATION WEIGHTING FOR EACH CLIENT

We work with each hiring company to define important factors for weighting each evaluation based on business model and GTM strategy, such as:

- Buy-and-Build: M&A competencies weighted more heavily; VP hired earlier in lifecycle
- Operational Improvement: Process and systems competencies weighted higher
- Upmarket Shift: Process design and forecasting weighted more heavily; enterprise motion experience critical

Ready to see the full framework in action?

We'd welcome the opportunity to walk your team through our complete evaluation methodology and discuss how it maps to your portfolio's specific RevOps needs.

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