

Enterprise Transformation & Revenue Operations Leadership Portfolio

*Driving Business Outcomes Through Revenue
Operations, Enterprise Transformation, and
Disciplined Project Execution*

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Revenue Operations & GTM Strategy | Enterprise Transformation
| Project & Program Management | Salesforce Strategy

Revenue Operations Operating System

Purpose

Transform GTM execution into predictable revenue outcomes through aligned processes, trusted data, and operational governance.

Key Outcomes

- ✓ Forecast Accuracy
- ✓ Pipeline Visibility
- ✓ Revenue Predictability
- ✓ Executive Decision Support
- ✓ Cross Functional Accountability
- ✓ Scalable Growth

Data → Process → Governance → Insights → Predictable Revenue

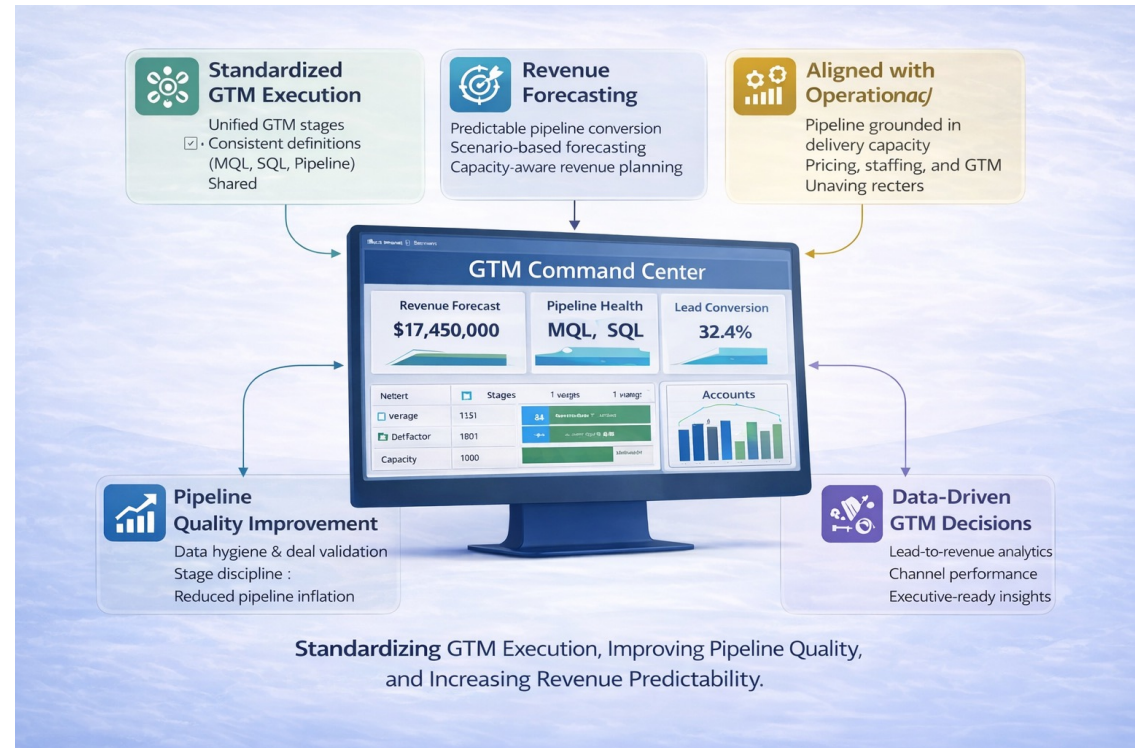


GTM Operating Model

Objectives

- ✓ Standardize GTM execution
- ✓ Improve pipeline quality
- ✓ Increase forecast accuracy
- ✓ Align Sales, Marketing, and Revenue Operations
- ✓ Enable scalable revenue growth

A unified operating model connecting demand generation, pipeline management, forecasting, and revenue execution.





Predictable Revenue Growth Framework

Key Principles

- ✓ ICP drives pipeline quality
- ✓ Pricing translates strategy into economics
- ✓ Demand generation prioritizes signal over volume
- ✓ Sales execution must be process driven
- ✓ RevOps converts activity into insight
- ✓ Predictable revenue is the result of disciplined execution

Outcome

Higher win rates • Improved retention • Lower CAC • Greater forecast accuracy • Predictable growth

Sales Process

A structured, repeatable approach to drive predictable revenue and operational excellence.



Established a repeatable sales execution framework that improved visibility, win rates, forecast reliability, and revenue predictability.

Revenue Intelligence & Executive Visibility

Salesforce Dashboards for Revenue Forecasting, Pipeline, and Lead Generation



Real-Time Insights Across Revenue Forecasting, Pipeline Management, and Lead Generation

Key Capabilities

- ✓ Revenue Forecasting
- ✓ Pipeline Visibility
- ✓ Executive KPI Reporting
- ✓ Forecast Accuracy
- ✓ Data Quality Governance
- ✓ Revenue Performance Analytics

Outcome

Salesforce Executive dashboards that transformed forecasting, pipeline management, and revenue performance into decision-ready insights.

AI Enabled Pipeline Command Center

Extending Revenue Intelligence with Predictive Monitoring, Funnel Analytics, and Automated Executive Insights

Key Capabilities

✓ Pipeline Health Monitoring

✓ Funnel Conversion Intelligence

✓ SLA & Lead Flow Compliance

✓ Pipeline Leakage Detection

✓ Channel Performance Analytics

✓ Executive Insight Generation

✓ Pipeline Risk Identification & Forecast Alerts

Business Value

✓ Improved Marketing-to-Pipeline Conversion

✓ Increased Pipeline Velocity

✓ Reduced Lead Leakage

✓ Enhanced Forecast Reliability

✓ Stronger Cross-Functional Accountability

Outcome

✓ Proactive Pipeline Management

✓ Faster Executive Decision Making

✓ Predictable Revenue Growth

AI Monitors:

Lead Aging | SLA Compliance | Funnel Conversion | Lead Routing | Pipeline Risk

AI Executive Revenue Insights

Converting Revenue Data into Executive Ready Analysis, Recommendations, and Strategic Actions

Key Capabilities

✓ Automated Executive Summaries

✓ Pipeline Trend Analysis

✓ Forecast Variance Explanations

✓ Sales Performance Insights

✓ Risk & Opportunity Identification

✓ Executive Reporting Automation

✓ Strategic Recommendation Generation

Business Value

- ✓ Reduced Manual Reporting Effort
- ✓ Faster Executive Decision Making
- ✓ Improved Leadership Visibility
- ✓ Consistent Performance Analysis
- ✓ Accelerated Action Planning

Business Impact

- Hours of weekly reporting eliminated
- Faster identification of performance trends
- Improved forecast transparency
- Enhanced cross-functional alignment

Outcome

- ✓ Executive Ready Insights in Minutes
- ✓ Improved Strategic Decision Making
- ✓ Greater Forecast Confidence
- ✓ Enhanced Revenue Predictability

AI Applications & Executive Insights

Transforming Operational Data into Executive Ready Insights, Forecast Explanations, and Strategic Recommendations

Designed and developed AI applications that automate revenue analysis, forecasting, performance management, and value engineering to accelerate executive decision making.

AI Pipeline Risk Monitor Application (Pipeline Health & Risk Detection)

Monitored pipeline activity, meeting schedules, and funnel progression to identify future pipeline gaps and revenue generation risks.

Example Insight

No meetings are currently scheduled for December, creating a potential Q1 pipeline generation risk.

AI Forecast Intelligence Engine Application (Forecast Variance Analysis & Revenue Risk Identification)

Analyzed forecast changes, opportunity movement, and close probabilities to explain forecast variance and identify emerging revenue risks.

Example Insight

Forecast decreased by \$1.1M compared to the prior month due to delayed implementation timelines and reduced close probability on strategic opportunities.

AI DBD Performance Analyzer Application (Performance Analytics & Coaching Insights)

Analyzed meeting activity, target attainment, and engagement trends across Business Development Directors to automatically generate executive performance summaries and coaching recommendations.

Example Insight

October represented the strongest pipeline generation month of the year, driven by sustained performance from Kaitlyn and accelerated growth from Matt.

AI Value Engineering Assistant Application (TPV, TCO & Business Case Automation)

Analyzed operational, staffing, and financial models to automatically generate Total Partnership Value (TPV), TCO, ROI, and business case summaries.

Example Insight

Arise delivery model generated 20.3% annual cost savings while improving handle rates and reducing cost-per-transaction by 23.4%.

Business Outcome

- ✓ Reduced Manual Analysis
- ✓ Faster Executive Reporting
- ✓ Improved Forecast Transparency
- ✓ Earlier Risk Identification



Revenue Operations, Incentive Compensation & Commission Governance

Monthly Commission Administration | Incentive Design | Revenue Performance Governance

Sales & Business Development Compensation Programs

- Designed, administered, and governed incentive compensation programs for Sales and Business Development teams.
- Managed monthly commission calculations, validation, payout reporting, and dispute resolution.
- Built and managed a tiered incentive model aligned to revenue funnel progression.
- Partnered with Finance and Sales Leadership to ensure compensation accuracy, transparency, and policy compliance.

Sales Commission Structure: 50% Year 1 | 25% Year 2 | 25% Year 3

Lead Gen Tiered Incentive program: Qualified Meetings → RFQs → Signed Agreements

Business Impact

- ✓ Aligned compensation with pipeline generation, conversion, and retention objectives.
- ✓ Increased alignment and accountability across Lead Generation, Sales, and Revenue Operations.
- ✓ Reinforced customer retention and long-term recurring revenue growth.

Pricing Strategy & Commercial Excellence

Key Capabilities

- ✓ Pricing Strategy
- ✓ Margin Forecasting
- ✓ Commercial Modeling
- ✓ Revenue & Profitability Analysis
- ✓ Forecast Accuracy Improvement
- ✓ Data Driven Pricing Decisions

Outcome

Improved forecast reliability, strengthened deal economics, and aligned pricing decisions with operational realities through a standardized pricing framework.



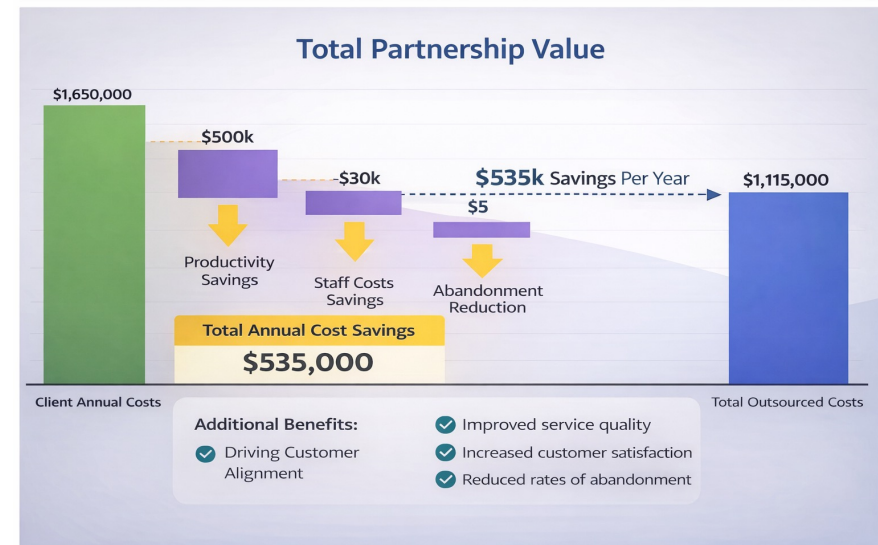
Value Engineering & Business Case Development

Key Capabilities

- ✓ Total Partnership Value (TPV)
- ✓ Total Cost of Ownership (TCO)
- ✓ ROI & Payback Analysis
- ✓ Executive Business Cases
- ✓ Pricing & Commercial Strategy
- ✓ Investment Justification

Outcome

Translated operational and outsourcing initiatives into quantified business value, enabling executive stakeholders to make informed investment decisions.



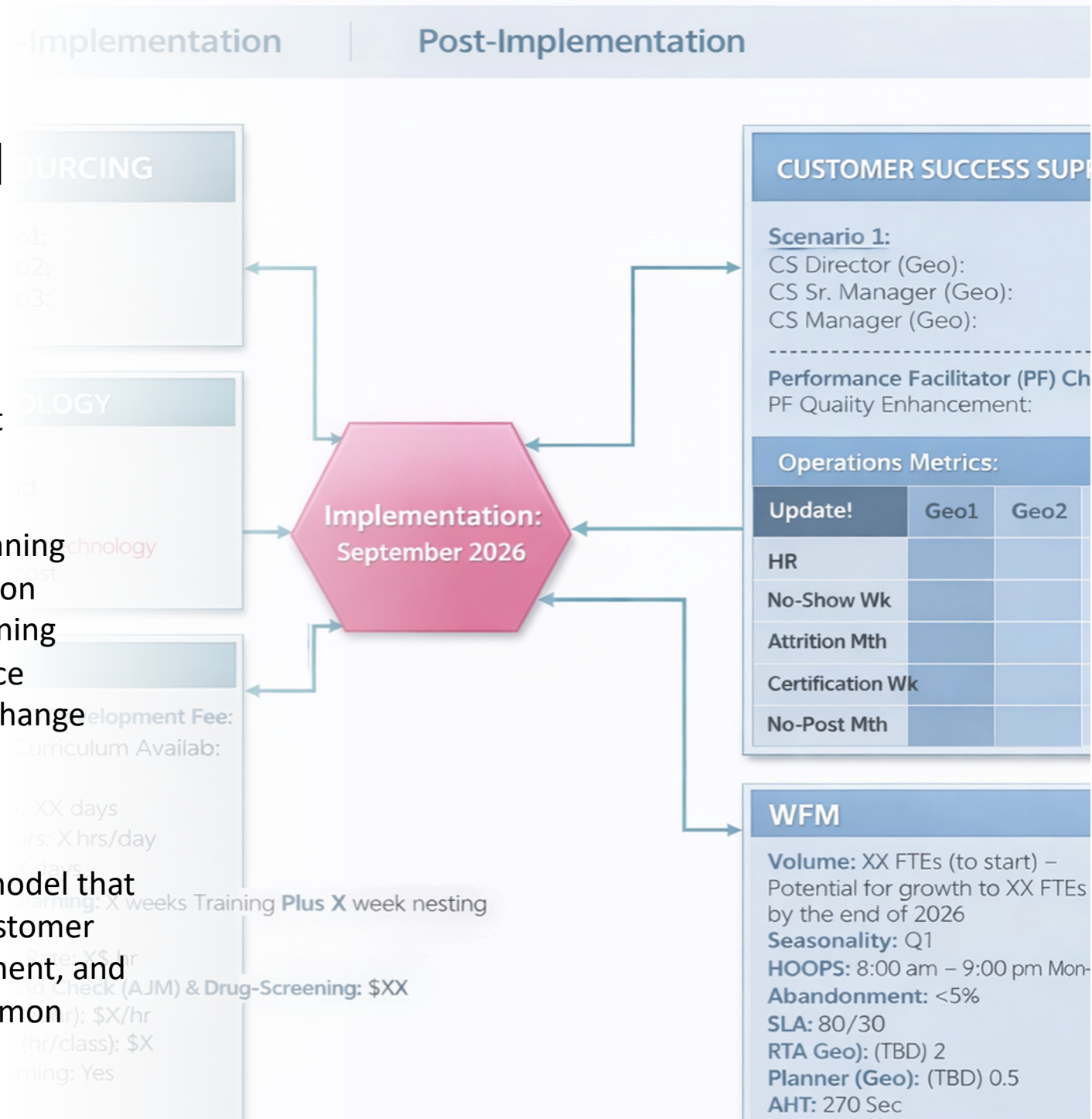
Cross Functional Operating Model Design

Key Capabilities

- ✓ Cross Functional Alignment
- ✓ End to End Solution Design
- ✓ Business Process Design
- ✓ Operational Readiness Planning
- ✓ Customer Success Integration
- ✓ Workforce & Capacity Planning
- ✓ Implementation Governance
- ✓ Stakeholder Alignment & Change Leadership

Outcome

Created a unified operating model that aligned Sales, Operations, Customer Success, Workforce Management, and Delivery teams around a common execution framework.



Enterprise Project & Program Management

Turning Business Priorities into Structured, Governed, and Measurable Execution

DEFINE	PLAN	EXECUTE & GOVERN	IMPLEMENT & MEASURE
✓ Business Requirements	✓ Project Planning & Milestones	✓ Cross-Functional Leadership	✓ Implementation Readiness
✓ Stakeholder Discovery	✓ Resource Coordination	✓ Stakeholder & Vendor Coordination	✓ Change Adoption & Training
✓ Process Mapping	✓ Dependencies & Priorities	✓ Risk, Issue & Change Management	✓ KPI & Performance Tracking
✓ Scope & Success Criteria	✓ Risk & Change Planning	✓ Governance & Executive Reporting	✓ Continuous Improvement

OUTCOME

Translates business priorities into structured execution by aligning scope, stakeholders, resources, governance, risk management, implementation, and performance measurement.

Selected Project & Transformation Experience

Cross-Functional Delivery Across Technology, Healthcare, Operations, and Business Transformation.

Connected Health & IoT Program Delivery

- End-to-end delivery of Connected Health and Industrial IoT initiatives spanning software, hardware, and firmware using a **hybrid Agile/Waterfall delivery model**.
 - ✓ Project planning & execution
 - ✓ Cross-functional stakeholder coordination
 - ✓ Internal, external & subcontractor coordination
 - ✓ Risk, change & delivery management
 - ✓ Implementation readiness & process training

Salesforce & Contract Process Automation

- Business-side transformation and automation of contract management processes using Salesforce and SpringCM.
 - ✓ Business requirements, process mapping & workflow redesign
 - ✓ Salesforce / SpringCM process automation & QA/QC
 - ✓ Change control, workflow governance & KPI tracking

Cross-Functional Enterprise Transformation

- Cross-functional business transformation spanning Sales, Customer Success, Workforce Management, Finance, Operations, and Technology.
 - ✓ Business requirements, workflow redesign & process standardization
 - ✓ Cross-functional planning, coordination & governance
 - ✓ Executive reporting, decision support & implementation alignment

Enterprise Leadership & Organizational Impact

Key Capabilities

- ✓ Enterprise & Program Leadership
- ✓ Cross Functional Team Leadership
- ✓ Executive Stakeholder Management
- ✓ Change Leadership
- ✓ Talent Development
- ✓ Program Governance

Outcome

Built cross-functional alignment across business, technology, and executive stakeholders, strengthening program governance, organizational accountability, change execution, and operational performance.



Revenue Operations Leadership Portfolio

Core Capabilities

- ✓ Revenue Operations Leadership
- ✓ Salesforce Strategy & Governance
- ✓ GTM Operating Models
- ✓ Revenue Forecasting & Pipeline Intelligence
- ✓ Value Engineering & Business Cases
- ✓ Pricing Strategy & Commercial Excellence
- ✓ Enterprise Transformation & Program Management
- ✓ Executive Stakeholder Leadership

Outcome

Built predictable revenue engines by aligning strategy, operating models, execution, analytics, governance, and leadership around measurable business outcomes.



Selected Business Outcomes

CAPABILITY AREA		BUSINESS OUTCOME	
	REVENUE OPERATIONS		Improved forecast discipline and executive visibility.
	GTM OPERATING MODEL		Increased pipeline transparency and accountability.
	REVENUE INTELLIGENCE		Enabled data driven executive decision making.
	VALUE ENGINEERING & BUSINESS CASES		Quantified investment decisions through TPV and TCO analysis.
	PRICING STRATEGY & COMMERCIAL EXCELLENCE		Improved alignment between pricing decisions and delivery economics.
	PROJECT & PROGRAM MANAGEMENT		Delivered cross-functional initiatives through structured planning, governance, risk management, and implementation.



Shahin Tabrizi

**Revenue Operations & GTM
Strategy | Enterprise Transformation
| Project & Program Management |
Salesforce Strategy**

Driving measurable business outcomes through Revenue Operations, enterprise transformation, disciplined project and program execution, Salesforce strategy, and cross-functional leadership.