

A JAYSON FORDE OPERATIONAL BLUEPRINT

Relotz: SaaS Client & Revenue Operations

Revenue
Operations
Blueprint
SAAS SCALE

Building & Scaling Client Success and Revenue Operations
From Zero

BPM · Customer Success · Revenue Operations · Workforce Enablement

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CONFIDENTIAL

EXECUTIVE OVERVIEW

Client Success & Revenue Operations, Built From Zero

This operating blueprint shows what I built, how I operated it, how I measured it, and what the architecture demonstrates, across Marketing, Sales, onboarding, Customer Success, Account Support, renewal, retention, Product feedback, workforce development, and executive reporting.



OPERATING ARCHITECTURE · THE REVENUE LIFECYCLE

EVIDENCE BOUNDARY · RESUME-ANCHORED SCOPE

Head of Client & Revenue Operations for a SaaS startup: **built the Customer Success and Revenue Operations function from zero and scaled it to a 40-person operation.** The scope and scale are resume-anchored. The operating models, workflows, and artifacts shown here are formalized reconstructions of the repeatable methods used; demonstration data is sanitized and illustrative. No confidential customer names, contracts, or financial records are represented.

What I Built & Governed

- ◆ **Client Success & Revenue Operations infrastructure** built from zero, scaled to a 40-person operation.
- ◆ **Customer lifecycle workflows** connecting onboarding, engagement, support, health, renewal, retention, and feedback.
- ◆ **BPM and SOP structures** for repeatable execution, ownership, escalation, documentation, and accountability.
- ◆ **New-hire and role development** for Customer Success and support functions.
- ◆ **KPI and customer-health reporting** exposing operational risk and revenue leakage.
- ◆ **AI-assisted workflows** with human review and accountability.

— HOW THIS BLUEPRINT IS ORGANIZED

Seven Operating Departments

01 Revenue Lifecycle & Leakage Diagnosis
The end-to-end flow and how I trace leakage to root cause.

02 Sales-to-CS Handoff & Onboarding
Protecting momentum across the first critical handoffs.

03 Customer Success & Account Health
Proactive account ownership and the health decision path.

04 Account Support & Escalation
Governed resolution work that becomes health intelligence.

05 Renewal, Retention & Recovery
Protecting and expanding revenue; recovering cancellations.

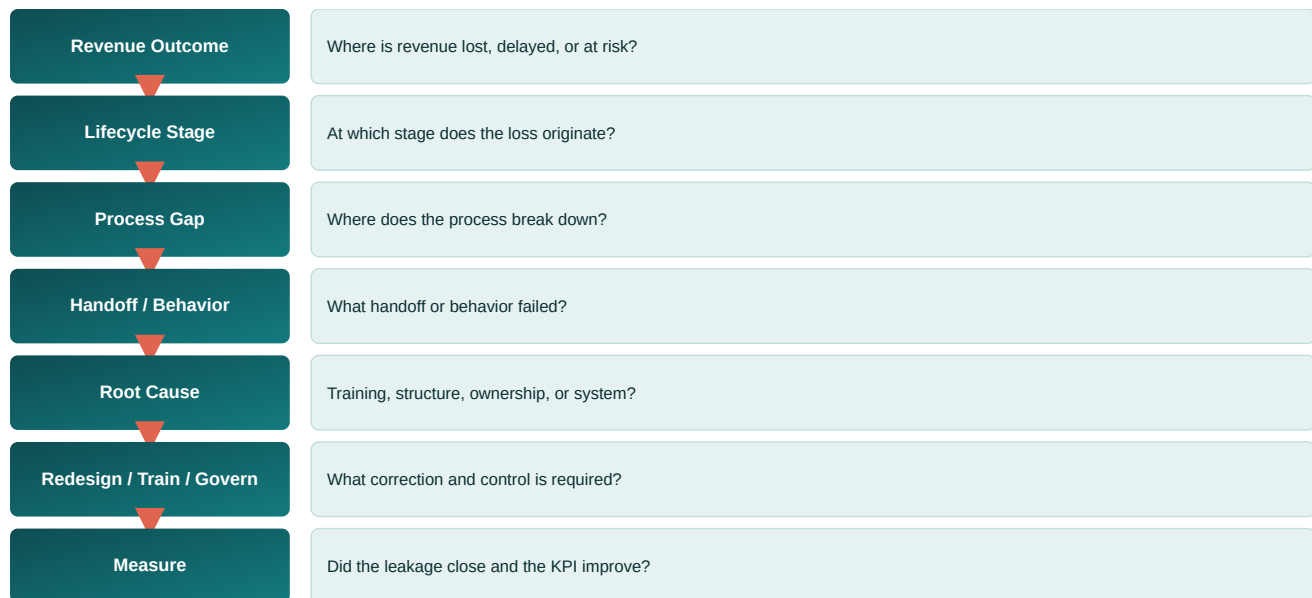
06 Workforce Enablement & SOP Governance
Talent-to-production, training governance, readiness.

07 Executive Intelligence & AI-Assisted Ops
Frontline evidence to executive decisions, with HITL AI.

— THE DIAGNOSTIC METHOD

How I Diagnose Revenue Leakage

I start from the customer or revenue outcome and work backward, through lifecycle stage, process gap, and the handoff or behavior, to root cause, then redesign, train, govern, and measure.



REVENUE LEAKAGE LOGIC · OUTCOME TO ROOT CAUSE

DEPARTMENT 01

Revenue Lifecycle & Cross-Functional Ownership

The end-to-end SaaS revenue lifecycle, with ownership, handoffs, and controls visible across every function.

The lifecycle only works when each function knows what it owns, what it must pass on, and what it is accountable for. The swimlane below makes cross-functional ownership and handoffs explicit, so leakage between functions becomes visible instead of hidden.



CROSS-FUNCTIONAL REVENUE LIFECYCLE SWIMLANE

ACCOUNTABILITY

- ◆ Each function owns its stage outcome and the quality of its handoff packet.
- ◆ A named owner is accountable at every lane transition, no orphaned accounts.
- ◆ Handoff completeness is documented and reviewable.

MEASUREMENT

- ◆ Stage conversion and cycle time per lane.
- ◆ Handoff-quality and rework rate at each transition.
- ◆ Leakage rate mapped to the lane where it originates.

DEPARTMENT 02

Sales-to-CS Handoff & Onboarding

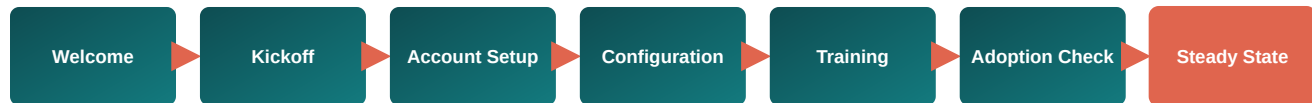
The first handoffs decide the relationship. Momentum and context must survive the transition from Sales into onboarding and Customer Success.

Sales-to-CS Handoff



SALES-TO-CS HANDOFF · CONTEXT SURVIVES THE TRANSITION

Customer Onboarding Workflow



CUSTOMER ONBOARDING WORKFLOW · WELCOME TO STEADY STATE

ACCOUNTABILITY

- ♦ Sales owns a complete handoff packet; CS confirms receipt before kickoff.
- ♦ Onboarding owner is accountable for the adoption check before steady state.

MEASUREMENT

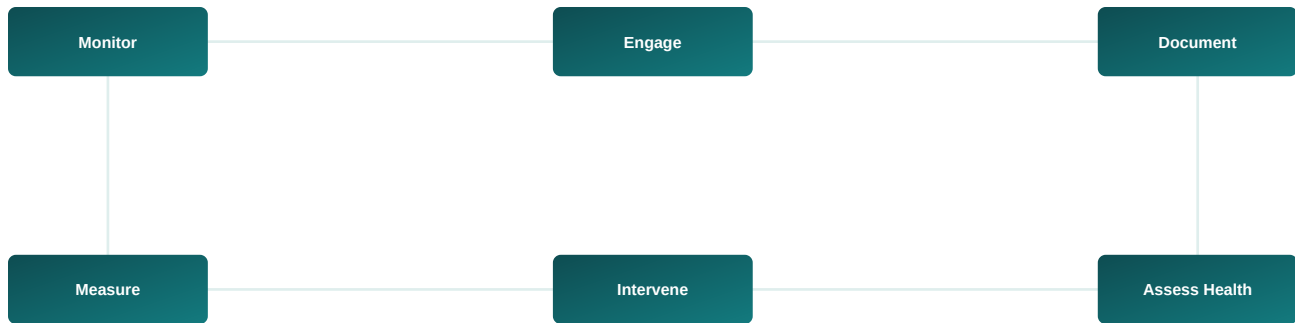
- ♦ Handoff-packet completeness score.
- ♦ Time-to-first-value and onboarding completion rate.
- ♦ Adoption-check pass rate before steady state.

DEPARTMENT 03

Customer Success & Account Health

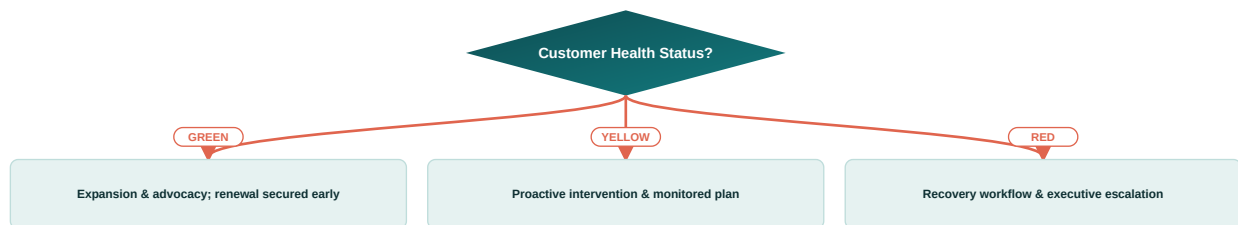
Customer Success as proactive account ownership, not reactive support. Health is assessed continuously and drives intervention.

Customer Success Loop



CUSTOMER SUCCESS LOOP · PROACTIVE ACCOUNT OWNERSHIP

Customer Health Decision Path



CUSTOMER HEALTH DECISION PATH

ACCOUNTABILITY

- ♦ A CS owner is accountable for every account health status and plan.
- ♦ Red accounts trigger a documented intervention with an owner and due date.

MEASUREMENT

- ♦ Health-score distribution (green / yellow / red) over time.
- ♦ Intervention response time and recovery rate on red accounts.
- ♦ Net revenue retention and expansion by cohort.

DEPARTMENT 04

Account Support & Escalation

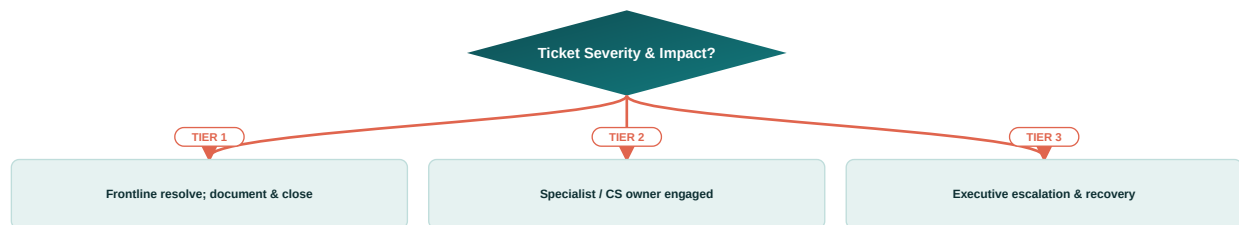
Governed resolution work, where every ticket is also a customer-health signal, not isolated volume.

Support Governance Workflow



SUPPORT GOVERNANCE · INTAKE TO VERIFIED CLOSE

Escalation Decision Tree



ESCALATION DECISION TREE · SEVERITY-BASED ROUTING

ACCOUNTABILITY

- ◆ Every ticket has an owner, a tier, and a resolution commitment.
- ◆ Escalations follow defined tiers; nothing stalls without a named owner.
- ◆ Resolved tickets feed the customer-health record.

MEASUREMENT

- ◆ First-response and resolution time by tier.
- ◆ Escalation rate and reopen rate.
- ◆ Support signal correlated to health-score movement.

DEPARTMENT 05

Renewal, Retention & Recovery

Revenue is protected proactively, renewal begins early, at-risk accounts are recovered, and every loss feeds learning.

Renewal & Retention Workflow



RENEWAL & RETENTION · PROACTIVE FROM ~90 DAYS OUT

Cancellation Recovery Workflow



CANCELLATION RECOVERY · SAVE, RECOVER, OR LEARN

ACCOUNTABILITY

- ◆ Renewal owner engages ~90 days before expiration, no last-minute scrambles.
- ◆ Every cancellation gets a root-cause review and a save attempt.

MEASUREMENT

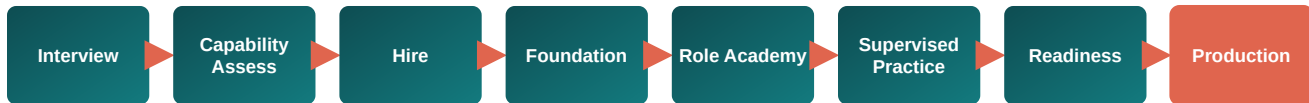
- ◆ Renewal rate and on-time renewal percentage.
- ◆ Gross and net retention; expansion revenue.
- ◆ Save rate and cancellation root-cause trends.

DEPARTMENT 06

Workforce Enablement & SOP Governance

The 40-person operation was built through a defined talent-to-production pathway and kept sharp by a training-governance loop.

Talent-to-Production Pathway



TALENT-TO-PRODUCTION · INTERVIEW TO INDEPENDENT PRODUCTION

Training Governance Loop



TRAINING GOVERNANCE LOOP · SOPS STAY ADOPTED

ACCOUNTABILITY

- ◆ A person reaches production only on a documented readiness decision.
- ◆ Each SOP has an owner; adoption is reviewed, not assumed.

MEASUREMENT

- ◆ Time-to-readiness and readiness pass rate by role.
- ◆ SOP adoption score and retraining frequency.
- ◆ Post-training performance vs. baseline.

READINESS, NOT ATTENDANCE

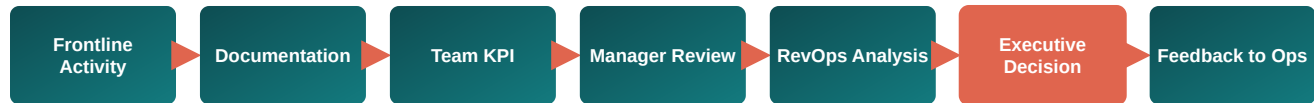
The standard showed the actual training architecture, readiness logic, SOP governance, and performance measurement, **not merely that training occurred.**

DEPARTMENT 07

Executive Intelligence & AI-Assisted Operations

Daily execution becomes the evidence base for revenue decisions, and AI accelerates the work while humans stay accountable.

Operating Intelligence Flow



OPERATING INTELLIGENCE · FRONTLINE TO EXECUTIVE AND BACK

AI-Assisted Account Planning with Human-in-the-Loop



AI-ASSISTED ACCOUNT PLANNING · AI DRAFTS, HUMAN APPROVES

ACCOUNTABILITY

- ♦ Executive decisions are grounded in documented frontline evidence.
- ♦ AI drafts; a named human reviews and approves before anything client-facing.

MEASUREMENT

- ♦ KPI reliability and reporting cadence adherence.
- ♦ Decision-to-action cycle time.
- ♦ AI-assisted throughput with maintained review-and-approval rate.

— INSPECTABLE ARTIFACTS

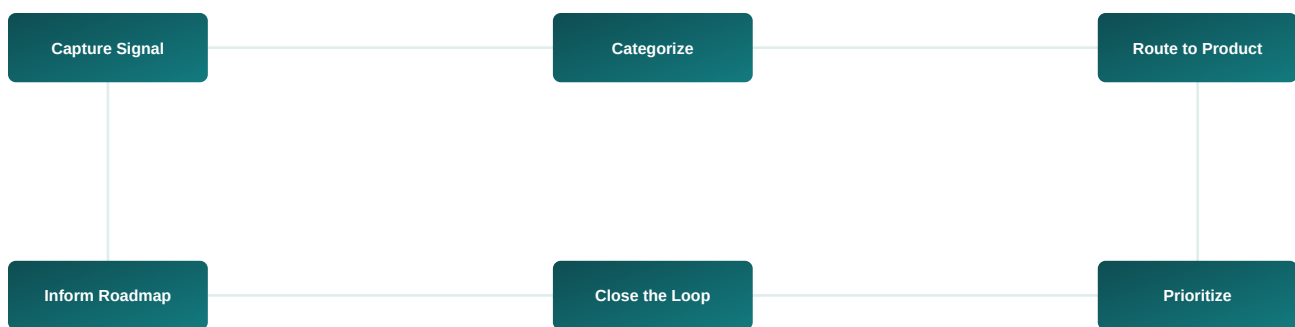
The Operating Toolkit

The operation produced a connected set of governance artifacts. Each is a portfolio-ready reconstruction of the operating method with sanitized demonstration data, not an original corporate record.

Revenue Leakage Register REGISTER Logs each leakage point by lifecycle stage, root cause, owner, and fix status. <i>Demo: 3 sample leak points, sanitized</i>	Cross-Functional Handoff Matrix MATRIX Defines who passes what to whom, and the acceptance criteria at each handoff. <i>Demo: Sales → CS row, illustrative</i>
Customer Health Scorecard SCORECARD Scores accounts green / yellow / red across usage, engagement, and risk signals. <i>Demo: sanitized account rows</i>	Ticket Governance & Escalation Matrix MATRIX Maps severity tiers to owners, response commitments, and escalation paths. <i>Demo: 3-tier illustrative</i>
Renewal Readiness & Cancellation Analysis ANALYSIS Tracks renewal readiness and root-causes cancellations for recovery and learning. <i>Demo: sample cohort, sanitized</i>	SOP Library & Adoption Scorecard LIBRARY Houses SOPs with owners and tracks adoption and retraining status. <i>Demo: sample SOP set</i>

Voice-of-Customer Loop

Customer signal did not stop at resolution, it fed the product roadmap through a closed loop.



VOICE-OF-CUSTOMER LOOP · SIGNAL TO ROADMAP

THE CASE IN ONE LINE

I built the Customer Success and Revenue Operations engine from zero, scaled it to 40 people across seven governed departments, and **made daily execution the evidence base for retention, expansion, and revenue decisions.**