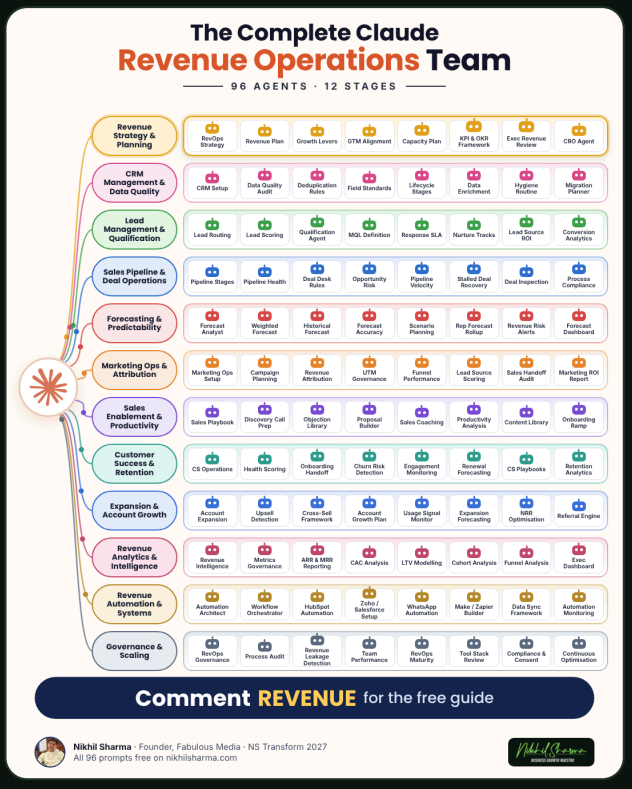
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AI TIPS & TRICKS · NO. 04

The complete Revenue Operations Team in Claude.

96 copy-paste agent prompts across 12 stages of revenue operations. Strategy, CRM, leads, pipeline, forecasting, attribution, enablement, retention, expansion, analytics, automation and governance.



96
agent prompts

12
RevOps stages

1
tool: Claude

₹0
extra software



Nikhil Sharma · Founder, Fabulous Media · NS Transform 2027
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Five rules for your AI RevOps team

1

Give Claude your context once

Paste a short brief: what you sell, to whom, your price, your team size, your CRM and your numbers. Every agent after that gets sharper. In Claude Code keep it in a CLAUDE.md file.

2

Fill every [bracket]

Each prompt has slots in [brackets]. Replace them with your real numbers and names. Vague in, vague out.

3

Feed it real exports

Most agents need data: a CRM export, a pipeline sheet or last quarter's numbers. Paste or upload them. Never invent a number and remove personal data you do not need.

4

Fix one stage a week

Start where revenue leaks most. For most founders that is CRM data, lead response or churn. Do not try all 96 in a day.

5

Keep the human in the loop

Claude drafts. You decide. Never send a message you have not read, and never invent a number or a customer.

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Revenue Strategy & Planning

01 RevOps Strategy

Act as my Head of RevOps. I run [business] selling [product] to [ICP] at [average deal size]. Map how revenue flows today from first touch to renewal. List the five biggest leaks and the order to fix them.

02 Revenue Plan

My target for the next 12 months is [target]. Work backwards to monthly leads, meetings, proposals and wins at realistic conversion rates for [industry] in India. Show the maths and flag the weakest assumption.

03 Growth Levers

Here are last year's numbers: [new revenue, expansion, churn, price changes]. Rank which lever grows revenue fastest: more leads, better conversion, higher price, more upsell or less churn. Quantify each.

04 GTM Alignment

Our sales, marketing and success teams each say the priority is [list]. Write one shared revenue goal, three shared metrics and the weekly meeting that keeps all three teams honest.

05 Capacity Plan

We have [n] sellers, each handling [x] deals a month at a [y]% win rate. How many sellers, SDRs and CSMs do we need to hit [target]? Show when to hire each role.

06 KPI & OKR Framework

Write quarterly OKRs for revenue operations at a [stage] company selling [product]. Three objectives, three key results each. Every key result must be a number we already track or can track this month.

07 Exec Revenue Review

Turn these numbers into a one-page revenue review for the founder: [paste]. What happened, why, what we will do next month and the one decision needed from leadership.

08 CRO Agent

Act as a hands-on Chief Revenue Officer. Read our pipeline, funnel and churn data: [paste]. Tell me bluntly the three things you would change this week and why.

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CRM Management & Data Quality

09 CRM Setup

Design a simple CRM structure for [business] in [HubSpot / Zoho / Salesforce / a Google Sheet]: objects, stages, required fields and owners. Keep it to what a team of [n] will actually fill.

10 Data Quality Audit

Here is a CRM export: [paste]. Find duplicates, missing fields, dead deals and wrong stages. Give me a cleanup list sorted by revenue at risk.

11 Deduplication Rules

Write deduplication rules for our contacts and companies using email, phone, domain and GST number. Say which record wins in each conflict and why.

12 Field Standards

Create a field dictionary for our CRM: name, type, allowed values and who fills it. Include industry, city, deal source and lost reason with fixed picklists.

13 Lifecycle Stages

Define lifecycle stages from subscriber to advocate for [business]. For each give the entry rule, exit rule and the owner. Make sure marketing and sales agree on the handoff.

14 Data Enrichment

For these accounts [paste], use web search to add industry, size, city, website and a recent trigger event. Mark anything you could not verify.

15 Hygiene Routine

Write a 15-minute weekly CRM hygiene routine for each seller and a monthly one for the RevOps owner. Make it a checklist.

16 Migration Planner

We are moving from [old tool] to [new tool]. Write a migration plan: field mapping, cleanup before the move, test batch, cutover day and rollback.

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Lead Management & Qualification

17 Lead Routing

Design lead routing for [n] sellers across [regions or segments]. Include round-robin rules, VIP accounts, response-time targets and what happens when someone is on leave.

18 Lead Scoring

Build a lead scoring model from these won and lost deals: [paste]. Score fit and intent separately, 0 to 100 each. Explain each signal's weight.

19 Qualification Agent

Act as my SDR. For each inbound lead here [paste], qualify against [BANT or our criteria], write one line on why and the next action within 24 hours.

20 MQL Definition

Write a sharp MQL and SQL definition for [business] that marketing and sales both sign. Include three examples that pass and three that fail.

21 Response SLA

Set speed-to-lead targets by channel: website form, WhatsApp, call and LinkedIn. Write the alert, the escalation and a weekly SLA report format.

22 Nurture Tracks

Design three nurture tracks for leads that are not ready: too early, wrong timing and price-sensitive. Five touches each across email and WhatsApp.

23 Lead Source ROI

Here is spend and revenue by source: [paste]. Calculate cost per lead, cost per deal and payback by source. Tell me where to move budget.

24 Conversion Analytics

Map our funnel conversion from lead to MQL to SQL to won using [paste]. Find the biggest drop and three experiments to fix it this month.

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Sales Pipeline & Deal Operations

25 Pipeline Stages

Define pipeline stages for [sales motion] with clear exit criteria for each, the buyer action that proves it and the probability we assign.

26 Pipeline Health

Here is my pipeline: [paste stage, value, age, last activity]. Score its health. Flag stale deals, stage-skippers and deals with no next step.

27 Deal Desk Rules

Write deal desk rules: discount limits by role, approval steps, payment terms and what needs the founder's sign-off.

28 Opportunity Risk

For each open deal [paste], rate risk as low, medium or high with a one-line reason and one action to de-risk it this week.

29 Pipeline Velocity

Calculate pipeline velocity from [deals, value, win rate, cycle length]. Show which of the four inputs moves revenue most if we improve it by 10%.

30 Stalled Deal Recovery

These deals have not moved in 30 days: [paste]. For each write a short re-engagement message that gives the buyer a reason to reply.

31 Deal Inspection

Prepare me for a deal review on [deal]. List what we know, what we assume and the five questions a sharp sales leader would ask.

32 Process Compliance

Audit how my team follows our sales process using [CRM export]. Show who skips stages or fields and the coaching each person needs.

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Forecasting & Predictability

33 Forecast Analyst

Build this month's forecast from my pipeline [paste]. Give commit, best case and pipeline numbers with the deals behind each.

34 Weighted Forecast

Calculate a weighted forecast using our stage probabilities [list]. Then adjust each probability using our actual historical win rates by stage.

35 Historical Forecast

From the last [n] quarters of bookings [paste], forecast next quarter. Account for seasonality such as Diwali, financial year-end and budget cycles.

36 Forecast Accuracy

Compare our past forecasts with actuals: [paste]. Show where we over- or under-called and the bias by seller.

37 Scenario Planning

Model three revenue scenarios for the next two quarters: base, downside and upside. List the trigger that would move us into each.

38 Rep Forecast Rollup

Write a simple weekly rollup format where each seller calls their number and the manager adjusts it. Include the questions the manager must ask.

39 Revenue Risk Alerts

Define early-warning signals that this quarter's number is at risk. For each give the threshold, the alert and the response.

40 Forecast Dashboard

Design a one-screen forecast dashboard for the founder. List each chart, its data source and the decision it supports.

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Marketing Ops & Attribution

41 Marketing Ops Setup

List the marketing operations a [stage] company needs: forms, tracking, UTMs, lead capture, CRM sync and reporting. Mark what we can skip for now.

42 Campaign Planning

Plan a 30-day campaign to reach [ICP] for [offer]. Channels, budget split, assets, weekly calendar and the one metric that decides success.

43 Revenue Attribution

Recommend an attribution model for our sales cycle of [length]. Compare first-touch, last-touch and W-shaped. Explain which fits and why.

44 UTM Governance

Write a UTM naming standard and a one-page cheat sheet so every link from every team is tracked the same way.

45 Funnel Performance

Using [paste], show traffic to lead to deal conversion by channel. Which channel brings revenue, not just leads?

46 Lead Source Scoring

Rank our lead sources by quality using win rate, deal size and cycle length: [paste]. Recommend which to scale and which to stop.

47 Sales Handoff Audit

Audit our marketing-to-sales handoff with these leads and outcomes [paste]. Where are leads dropped and why?

48 Marketing ROI Report

Write a monthly marketing ROI report template: spend, pipeline created, revenue influenced and payback, with a short narrative section.

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Sales Enablement & Productivity

49 Sales Playbook

Draft a sales playbook for [product]: ICP, personas, discovery questions, demo flow, objections, pricing talk track and close plan.

50 Discovery Call Prep

Prepare me for a discovery call with [role] at [company]. Research them, write 10 questions and the three outcomes I want from the call.

51 Objection Library

Build an objection library for [product]: the real concern behind each objection, a question to ask and a short honest answer with proof.

52 Proposal Builder

Turn these call notes [paste] into a two-page proposal: their situation, outcome, approach, timeline and three investment options.

53 Sales Coaching

Review this call transcript [paste]. Score talk ratio, discovery depth, next-step clarity and objection handling. Give three coaching points.

54 Productivity Analysis

Here is each seller's activity and output [paste]. Find who is busy but not productive and what to change.

55 Content Library

List the sales content we need by funnel stage: case studies, one-pagers, ROI calculators and demo videos. Rank by deals they would help.

56 Onboarding Ramp

Write a 30-60-90 day ramp plan for a new seller with weekly goals, certifications and the number they should hit by day 90.

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Customer Success & Retention

57 CS Operations

Design customer success operations for [n] accounts: segments, touch model per segment, CSM ratio and tools.

58 Health Scoring

Build a customer health score using usage, support tickets, payment delays, NPS and stakeholder changes. Weight each and set red, amber and green bands.

59 Onboarding Handoff

Write a sales-to-success handoff template: what was promised, success criteria, stakeholders and risks. Nothing should be lost after signature.

60 Churn Risk Detection

From this customer data [paste], flag accounts likely to churn in 90 days. Give the reason and a save action for each.

61 Engagement Monitoring

Define engagement signals that matter for [product] and the alert that fires when an account goes quiet.

62 Renewal Forecasting

List renewals due in the next two quarters [paste] with likelihood, risk and the owner's next step.

63 CS Playbooks

Write playbooks for five moments: onboarding, first value, low usage, escalation and renewal. Each with trigger, steps and owner.

64 Retention Analytics

Calculate gross and net revenue retention and logo churn from [paste]. Show the trend and the top three churn reasons.

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Expansion & Account Growth

65 Account Expansion

Here are my accounts with product, usage and value [paste]. Find the 10 best expansion opportunities and the opener for each.

66 Upsell Detection

Define the usage and behaviour signals that show a customer is ready to upgrade. Write the alert and the message for each.

67 Cross-Sell Framework

Map which of our products naturally lead to which: [list products]. For each pair give the trigger and the pitch.

68 Account Growth Plan

Write an account plan for [key account]: org map, current footprint, whitespace, relationships to build and a 6-month expansion target.

69 Usage Signal Monitor

Design a weekly report that flags accounts near plan limits, adding users or using new features. Route each to its owner.

70 Expansion Forecasting

Forecast expansion revenue for next quarter from these accounts and signals [paste]. Show confidence for each.

71 NRR Optimisation

Our net revenue retention is [x]%. Model what it takes to reach [target]% through less churn, more upsell and price changes.

72 Referral Engine

Design a referral programme for happy customers: when to ask, what to offer, the email and WhatsApp scripts and how to track it.

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Revenue Analytics & Intelligence

73 Revenue Intelligence

Act as my revenue analyst. From [paste], tell me the five most important things that happened to revenue this month and why.

74 Metrics Governance

Write one definition for each revenue metric we use: bookings, revenue, ARR, pipeline, win rate and NRR. Note the source of truth for each.

75 ARR & MRR Reporting

Build an MRR movement table from [paste]: new, expansion, contraction, churn and reactivation. Explain the month in three lines.

76 CAC Analysis

Calculate blended and paid CAC, CAC payback and LTV to CAC from [paste]. Say whether we can afford to spend more.

77 LTV Modelling

Estimate customer lifetime value by segment from [paste]. Which segment should we chase harder?

78 Cohort Analysis

Run a cohort analysis by signup month for revenue retention using [paste]. Describe what the curve says about product fit.

79 Funnel Analysis

Find where revenue leaks across the full funnel from visit to renewal using [paste]. Size each leak in rupees.

80 Exec Dashboard

Design a weekly founder dashboard with no more than eight numbers. For each give the target, the trend and who owns it.

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Revenue Automation & Systems

81 Automation Architect
List the 10 most repetitive revenue tasks my team does: [describe week]. Rank them by hours saved if automated and suggest the tool for each.

82 Workflow Orchestrator
Design an end-to-end workflow from form fill to first meeting booked: steps, tools, triggers and failure alerts.

83 HubSpot Automation
Write HubSpot workflows for lead assignment, follow-up tasks, deal stage nudges and renewal reminders. Give the trigger and actions for each.

84 Zoho / Salesforce Setup
Translate these workflows [paste] into [Zoho CRM or Salesforce] automation rules with field updates and notifications.

85 WhatsApp Automation
Design WhatsApp Business flows for lead capture, appointment reminders and payment follow-ups that respect opt-in and do not spam.

86 Make / Zapier Builder
Write a step-by-step Make or Zapier scenario that moves a new deal from [CRM] to [invoicing tool] and Slack. Include error handling.

87 Data Sync Framework
Map how data should sync between CRM, billing, support and the product. Name the source of truth for each field.

88 Automation Monitoring
Write a weekly check for every automation we run: did it fire, did it fail and is it still needed?

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Governance & Scaling

89 RevOps Governance

Write a RevOps governance charter: who owns process, data, tools and reporting, and how changes are requested and approved.

90 Process Audit

Audit our end-to-end revenue process from [describe]. List steps that add no value, handoffs that drop balls and fixes in priority order.

91 Revenue Leakage Detection

Find revenue leakage in [paste]: unbilled work, missed renewals, discount creep and late payments. Size each in rupees.

92 Team Performance

Build a monthly scorecard for sales, marketing and success with three shared and three team-specific numbers.

93 RevOps Maturity

Score our RevOps maturity from 1 to 5 across strategy, data, process, tools and people. Give the next step for each.

94 Tool Stack Review

Here is our tool stack and spend [paste]. Find overlaps, unused seats and the stack a team our size really needs.

95 Compliance & Consent

List what our revenue processes must do to respect India's DPDP Act: consent, data storage, opt-outs and access rights. Flag what to check with a lawyer.

96 Continuous Optimisation

Design a monthly RevOps retro: what to review, how to pick one improvement and how to measure it next month.

WHAT NEXT

Want this RevOps engine built for you?

Prompts are the start. The win comes from wiring them into your CRM, your WhatsApp and your weekly rhythm so revenue runs without you chasing it. That is what Fabulous Media builds for founders and what NS Transform 2027 helps them scale.

NS Transform 2027

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