B2B REVENUE & OPERATIONS OS

From first enquiry to signed, funded, and ready for delivery — one connected system, not eleven disconnected tools.

The Problem

Complex B2B sales don't fail at the top of the funnel. They fail in the middle — in the gap between “interested” and “signed,” where a deal has to survive discovery calls, product configuration, quote revisions, internal approvals, contract redlines, and payment authority before it's actually won.

And even a signed deal isn't finished. Somebody still has to collect the right documents, verify what was promised against what was sold, hand it to the team that provisions or delivers it, and eventually follow up for renewal. Most businesses run this whole cycle across a CRM, a spreadsheet, an inbox, a contract tool, and someone's memory — and every handoff between those tools is where a deal quietly stalls.

Why This Is Different

- It's not a CRM implementation. It's the full commercial cycle — lead, discovery, configuration, quote, approval, contract, payment authority, documents, and handover — built as one connected system, not stitched together after the fact.
- Revenue and Operations are designed as one system with a deliberate seam. The handoff from “won” to “delivered” isn't an afterthought — it's a defined workflow with its own record, not a Slack message and a shrug.
- It's built once, reused everywhere. The same architecture that runs a complex ICT/telecom deal runs an industrial equipment quote, a managed services contract, or a wholesale order — the commercial cycle is the same shape across procurement-heavy B2B.
- Nothing gets lost in a handoff. Every stage — sales to operations, quote to contract, contract to delivery — passes through the same system instead of a new tool with its own login.

Phase 1 — Revenue

Generate → Capture → Qualify → Discover → Quote → Follow Up → Close

Everything that turns an enquiry into a signed, funded deal. Leads come in from your existing acquisition channels, get qualified against your criteria, and move through discovery, configuration, and quoting without falling out of the pipeline between steps. This is the phase your existing acquisition systems feed into — built and live today.

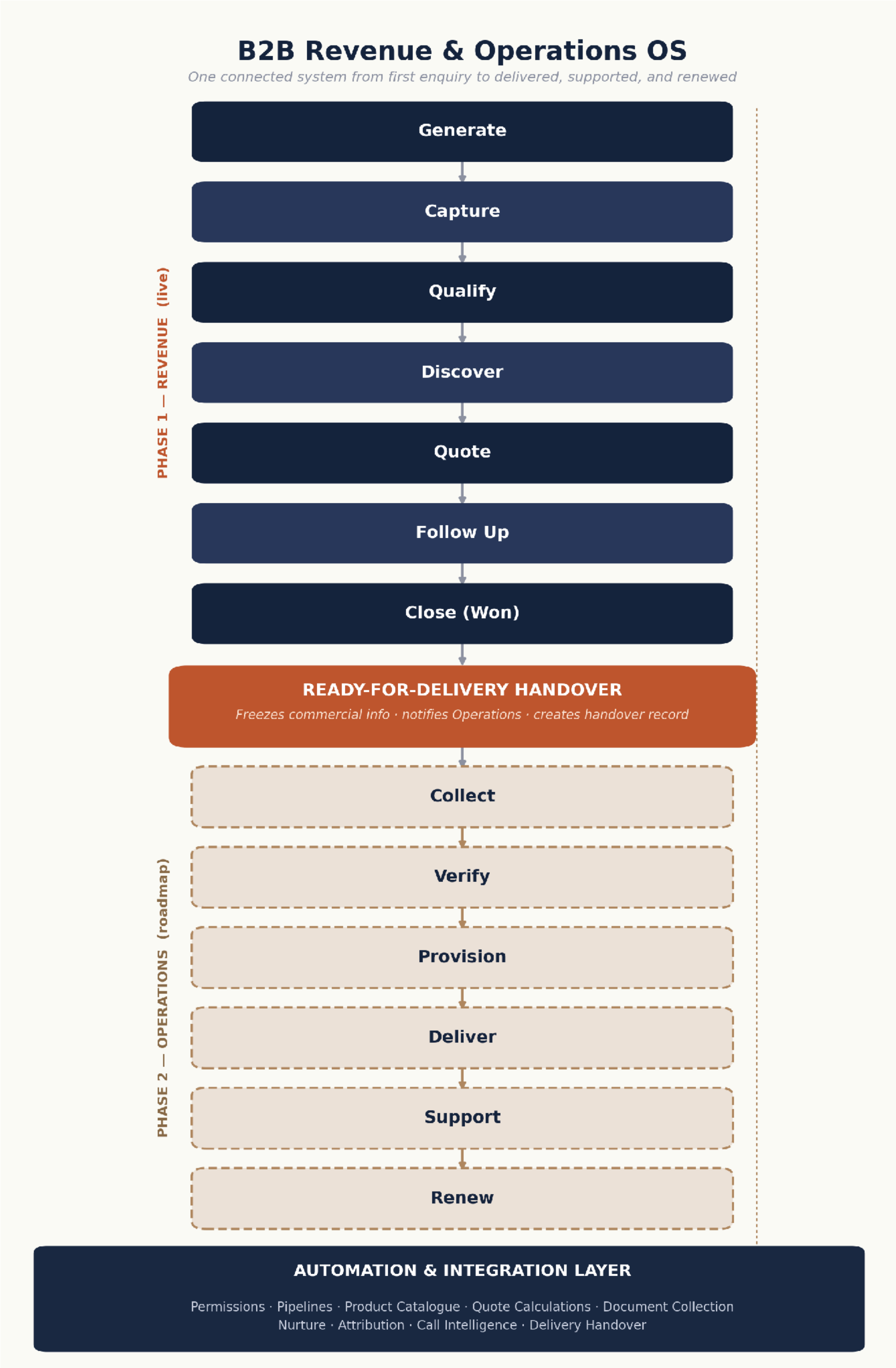
Phase 2 — Operations

Closed Won → Handover → Collect → Verify → Provision → Deliver → Support → Renew

Everything that happens after the signature. A won deal doesn't just get filed — it's handed to Operations with its commercial details frozen and intact, the right documents get collected and verified, the order gets provisioned and delivered, and the account moves into support and renewal. This is where the next phase of the system becomes powerful — the same discipline you already have on the sales side, carried through to delivery.

The Full Cycle

Revenue and Operations run as two connected phases, joined by a single Handover — with automation and integration running underneath both:



Stage Breakdown

1. Generate & Capture PHASE 1

Demand generation intake, lead capture across every channel

The problem

Enquiries arrive from ads, referrals, a website form, and inbound calls, each landing in a different place — or nowhere at all — so nobody has a single view of what's actually coming in.

What you get

Every channel feeds one pipeline. Leads are captured, tagged by source, and attributed automatically, so nothing arrives without a record of where it came from.

2. Qualify & Discover PHASE 1

Qualification criteria, structured discovery capturing real requirements

The problem

Reps spend time on deals that were never going to close, while real requirements gathered on a discovery call live in someone's notes instead of the system.

What you get

Leads are qualified against your criteria before they consume selling time, and discovery is captured as structured data — feeding directly into configuration and quoting instead of getting retyped.

3. Configure & Quote PHASE 1

Product/solution configuration, automated quote calculation

The problem

Quoting a complex solution means manually pulling a price list, checking configuration rules, and building a document from scratch — slow enough that a competitor's quote lands first.

What you get

Solutions are configured against your product catalogue with pricing and rules built in, and a quote is generated automatically — accurate, fast, and consistent no matter who's building it.

4. Approve, Contract & Close PHASE 1

Internal approval routing, e-signature contract, payment authority, follow-up

The problem

A quote sits waiting on an internal approval nobody's tracking, and once it's approved, the contract and payment step become another manual chase before the deal is actually closed.

What you get

Approvals route automatically to the right person, contracts go out for e-signature, payment authority is captured as part of closing — not after it — and follow-up keeps every open deal moving without a rep remembering to chase it.

5. Handover BRIDGE

Ready-for-Delivery handover from sales to operations

The problem

A deal closes and the details — what was promised, what was configured, what was agreed — live in a rep's head or a thread of emails that Operations has to reconstruct before they can start.

What you get

The moment a deal is won, commercial information is frozen, Operations is notified automatically, and a handover record is created — so delivery starts from facts, not from a game of telephone.

6. Collect & Verify PHASE 2

Automated document collection, verification against the signed contract

The problem	What you get
Delivery can't start until the right documents are in — IDs, site details, technical requirements — and chasing them one by one is slow and easy to get wrong.	Required documents are requested and tracked automatically, with a built-in check against what was actually signed, so incomplete or inconsistent submissions get flagged before they become a delivery problem.

7. Provision & Deliver PHASE 2

Procurement, provisioning, and delivery/implementation tracking

The problem	What you get
Once a deal is handed off, tracking what's been ordered, provisioned, and delivered often falls back to spreadsheets and status-update emails.	Provisioning and delivery status stay attached to the same record that started at Handover, so anyone — sales, ops, or the customer — can see exactly where an order stands.

8. Support & Renew PHASE 2

Post-delivery support routing, renewal triggers

The problem	What you get
A delivered account goes quiet until a renewal is missed or a support issue turns into a churn risk nobody saw coming.	Support requests route to the right team with full account history attached, and renewal dates trigger outreach automatically — so the relationship doesn't go cold after delivery.

Full Service List

The technical breakdown for anyone who wants to see exactly what's on the table. Core systems are where Phase 1 and the Handover live today; optional systems extend into Phase 2 and beyond as delivery and account management get pulled into the same system.

Core Systems

Build the connected commercial cycle from first enquiry through to a won, funded, handed-off deal.

Category	Services
Pipeline & CRM	Lead capture and routing, pipeline stages, permissions, attribution tracking
Discovery & Configuration	Structured discovery capture, product catalogue, solution configuration rules
Quoting	Automated quote calculation, revision tracking, approval routing
Contracting	E-signature contracts, payment authority capture, document generation
Handover	Ready-for-Delivery workflow — freezes commercial data, notifies Operations, creates the handover record

Category	Services
Follow-Up & Nurture	Automated follow-up cadences across open deals, call intelligence on key conversations

Optional / Phase 2 Systems

Layered in once Phase 1 and Handover are running, extending the same system into delivery and account management.

Category	Services
Document Collection	Automated request, tracking, and verification against the signed contract
Provisioning & Delivery	Status tracking for procurement, provisioning, and implementation, attached to the handover record
Support Routing	Ticket/request routing with full account and deal history attached
Renewal Automation	Renewal-date triggers, automated outreach and re-engagement
Reporting & Attribution	Revenue and delivery reporting rolled up across the full cycle, source-level attribution

CompleteOne: One Implementation of This OS

Complete ICT — ICT, Telecom & Technology Products and Services

CompleteOne is the first implementation of the B2B Revenue & Operations OS, built for a complex ICT/telecom/technology sales cycle spanning products and services together.

Milestone 1 covers the full Revenue phase — lead through discovery, quote, proposal, contract, and payment authority — plus the Ready-for-Delivery Handover: commercial information is frozen, Operations is notified, and a handover record is created automatically the moment a deal is won.

Delivery and Provisioning are scoped as the next milestone — precisely where Phase 2 Operations begins. The seam wasn't an afterthought; it was designed into Milestone 1 from the start.

The same architecture — pipeline, discovery, configuration, quoting, contracting, and handover — is what makes this repeatable for any procurement-heavy B2B business, not just ICT.

Get Started

Book a call and we'll walk through your current sales process, quoting method, contract and approval flow, and what happens after a deal closes — identify where deals stall or handoffs break, and recommend which systems to build first: no generic bundle, no pressure to build all eight stages at once.