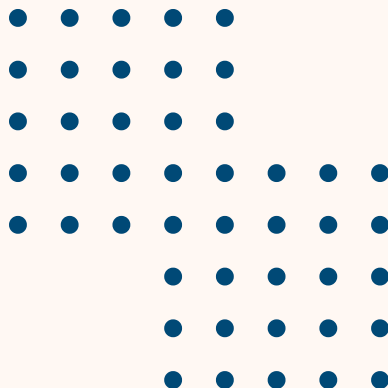


# 34 METRICS EVERY REVENUE LEADER MUST TRACK

BATTLE-TESTED AND PROVEN METRICS  
CHOSEN BY 12 SEASONED REVENUE LEADERS



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# Intro

This isn't just any collection of numbers and formulas.

Inside this ebook, you'll find a specially curated set of 34 metrics, battle-tested and vouched for by 12 seasoned revenue leaders.

These metrics are the secret sauce, the hidden gems that have been instrumental in shaping successful revenue strategies and operations of businesses that have mastered the art of generating revenue.


RevOps is about understanding what's clicking and what's missing. It's about getting to the bottom of things when there's a hitch and identifying the repeatable patterns of success when the numbers are on the rise. It's about turning insights into actions, and data into decisions.

That's where this guide comes into play.

Each metric in this guide is dissected in a straightforward manner. We give you the metric definition for a clear understanding, then delve into the business decisions that the metric helps for practical applications, and finally explore the benefits of it to help you see the larger picture.


It's like having a magnifying glass for your revenue operations - a tool to zoom in on the details and a lens to capture the broader view.

As you navigate through this guide, remember it's not about memorizing these metrics but about integrating them into your everyday revenue operations.



# JULIA HERMAN

Chief Revenue Officer @ vLex



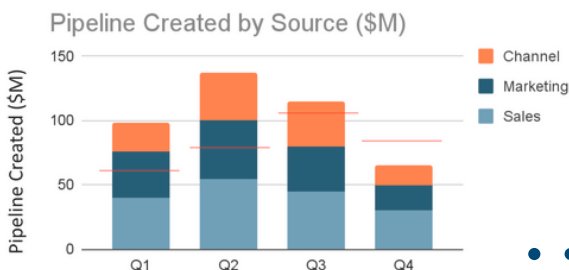
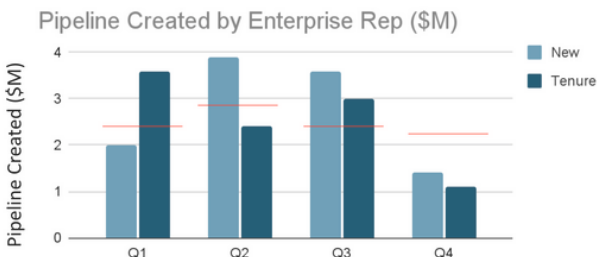
Julia Herman has more than 15 years of Revenue Operations experience working across different industries and hyper-growth companies.



# 1 PIPELINE CREATION

## METRIC DEFINITION:

- Amount of New ARR added by Rep Seniority.
- Amount of New ARR added by Source by Quarter.



## BUSINESS DECISIONS:

- How much pipeline was created by rep category?
- How much marketing pipeline is needed?
- How much is expected from channels?

## BENEFITS:

- Identify how much activity is needed to create pipeline.
- Leading indicator to rep performance.
- Identify targets by Pipeline Source.
- Tailored Enablement opportunities: learn and replicate.



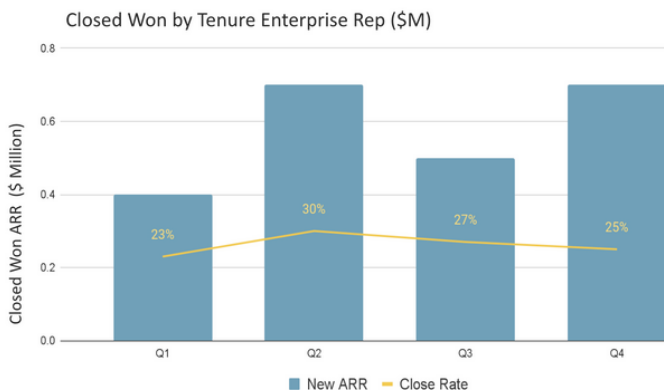
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# PIPELINE CONVERSION



## METRIC DEFINITION:

- % of Close Rate vs New ARR Won by Quarter.
- $[\text{Closed Won} / (\text{Closed Won} + \text{Lost})]$ .



## BUSINESS DECISIONS:

- Which sources are providing positive ROI?
- Which reps are burning through pipeline?
- How much can we expect from current open pipeline?

## BENEFITS:

- Identify gaps in Sales Rep, Marketing/Channel, and Product performance.
- Set pipeline goals.
- Calculate CAC.



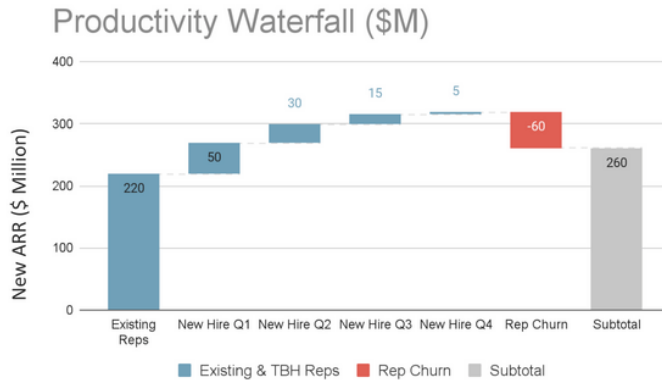
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# 3 REP PRODUCTIVITY

## METRIC DEFINITION:

- ARR closed by Expected ARR closed by Quarter.
- Models the # of reps needed to hit Revenue Target.



## BUSINESS DECISIONS:

- How much support is needed from Marketing, SDRs and Channel?
- What types of pivoting do we need to do with the teams to drive the expected ARR closure?
- How many new reps do we need to hire and by when to impact the expected ARR (not forgetting include rep attrition)?

## BENEFITS:

- Assign Rep Quotas.
- Agree on Marketing/Channel targets and pivoting initiatives.
- Hiring plan for the year.
- Target to Capacity ratio balance.




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# NEEL KAMAL

CRO & Co-founder @ BoostUp.ai



Neel Kamal is a seasoned leader with 15+ years of sales experience at companies like BoostUp, Aviatix, Wavefront (VMWare), Couchbase, and IBM. He has focused on the pursuit of excellence in sales execution, and on building world-class teams of metric-focused enablers.





# 4 OPPORTUNITY STAGE CONVERSION FUNNEL

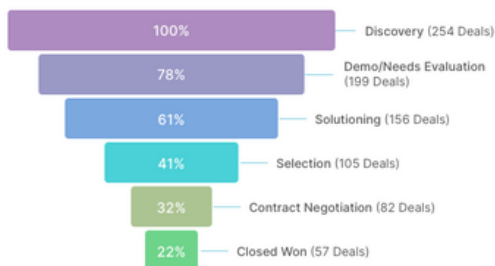
## METRIC DEFINITION:

- % of opps that moved to next stage from current stage.
- % of opps from current stage that were successfully closed.

### What is my conversion rate per stage?

Overall Conversion Rate  
22%

Avg. Sales Cycle  
72 days



## BUSINESS DECISIONS:

- Opportunity to close conversion rate informs how many qualified opportunities are required to hit the revenue target.
- Identify the funnel stages with the largest drop in conversion rate.
- Identify the funnel stages where reps are spending the majority of their time. Does that correlate with closing more deals?
- Identify which lead source has the highest conversion rates.

## BENEFITS:

- Assign Pipe Creation quotas.
- Drive marketing spend based on lead source conversion rates and targets.
- Identify coachable areas for improving deal progression.

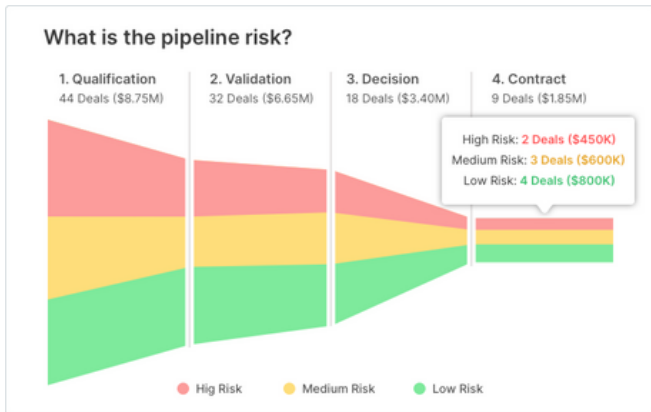


[Explore RevBI for similar revenue metrics](#)

# RISK-BASED PIPELINE REVIEW

## METRIC DEFINITION:

- Number and % of deals in Commit with high engagement risk.
- Number and % of deals in late stages with high engagement risk.
- Number of deals not in Commit that have a low engagement risk.



## BUSINESS DECISIONS:

- Identify the true quality of the current quarter pipeline. How many deals are real, and how many are not?
- If a large % of a manager or rep's commit deals have high risk, they might not be able to hit their forecast. Identify this risk early in the quarter.

## BENEFITS:

- Early indicators of whether a deal will close successfully or not.
- Early indicators of the health of the pipeline.
- Managers can help improve win-rate by focusing on deals that have a shot at closing (deals with medium risk).
- Managers can help focus reps' time by de-focusing on deals that do not have a shot of closing (deals with high risk late in the quarter).



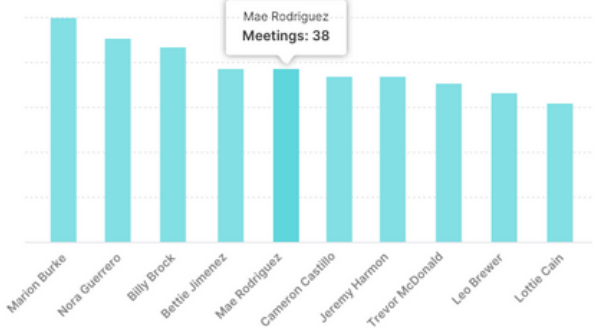
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# 2ND MEETINGS ON OPEN OPPS

## METRIC DEFINITION:

- Week over week trend of the number of 2nd meetings with an open opportunity.

Current Quarter 2nd Meetings by Reps



## BUSINESS DECISIONS:

- How well are we progressing on deals?
- Which reps are able to book more 2nd meetings?

## BENEFITS:

- The early indicator of a slowdown in the deal progression.
- Identify reps who might need help with progressing their deals.



[Explore RevBI for similar revenue metrics](#)



# EVAN RANDALL

Sr Vice President, Worldwide Go-To-Market  
Strategy & Operations @ Teradata



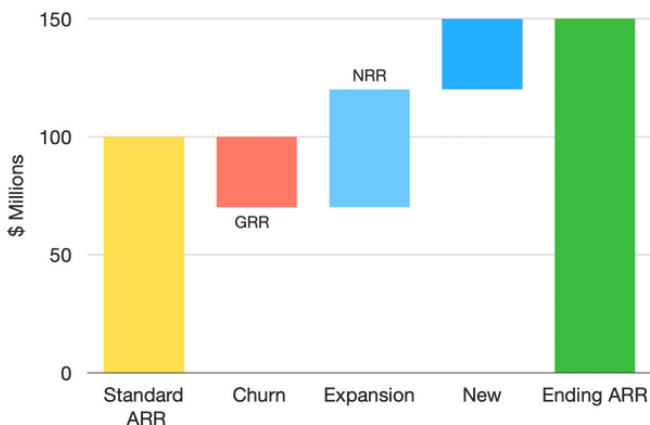
Evan Randall is currently the SVP of WW GTM Strategy and Operations at Teradata and brings over 20 years of experience of handling a broad range of responsibilities across sales and GTM strategy, including sales operations, sales training, ERP implementation, and discounting practice.



# ARR HEALTH

## METRIC DEFINITION:

- Visual representation of the positive and negative influences on your annual recurring revenue stream.



## BUSINESS DECISIONS:

- What do we need to do to ensure the overall health of our various revenue streams?
- Where do we need to do more or less investment in our revenue resources?
- How does our performance compare to other Standard Benchmarks (Median ARR Growth, GRR, NRR)?

## BENEFITS:

- Clear communication and portrayal of the challenge & issues.
- Investment prioritization.
- Articulate improvements quarter over quarter.

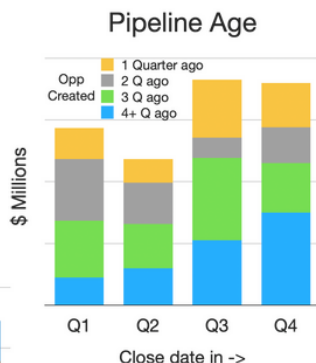
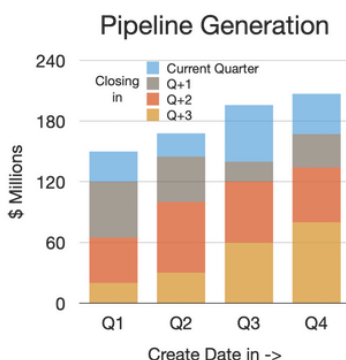


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# PIPELINE HEALTH

## METRIC DEFINITION:

- Visual representation of the generation, size, shape, and age of the company's pipeline.



## BUSINESS DECISIONS:

- Do we trust our forecast?
- Do we have enough coverage?
- Is the coverage we have stale?

## BENEFITS:

- Understand if you truly have enough pipeline to hit your targets.
- Ability to discuss as leadership areas of improvement.
- Determine which portion of the pipe needs immediate action.

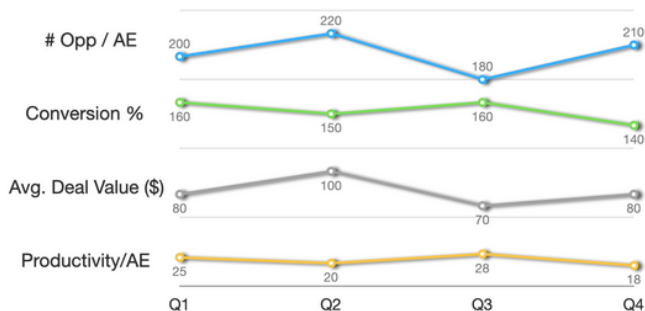


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# GTM HEALTH

## METRIC DEFINITION:

- Visual representation of the true productivity or cost efficiency of the go-to-market organization.



## BUSINESS DECISIONS:

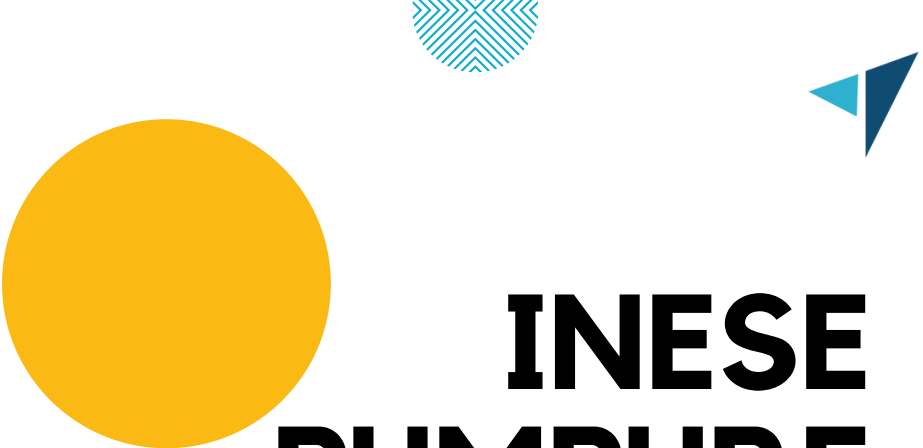
- What roles, capabilities, and program we should make?
- What lead sources campaigns and ABM programs should Marketing make?
- What areas of onboarding and immediate training we need to focus on?
- Do we need to accelerate or adjust our hiring plan?

## BENEFITS

- Helps you understand the true health of your GTM execution.
- Make significant investment decisions based on data.




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# INESE PUMPURE

Sr. Director of Revenue Operations @ Visiting Media



Inese Pumpure has more than a decade of experience in marketing and sales operations where she has helped build and implement scalable infrastructure systems for revenue teams.

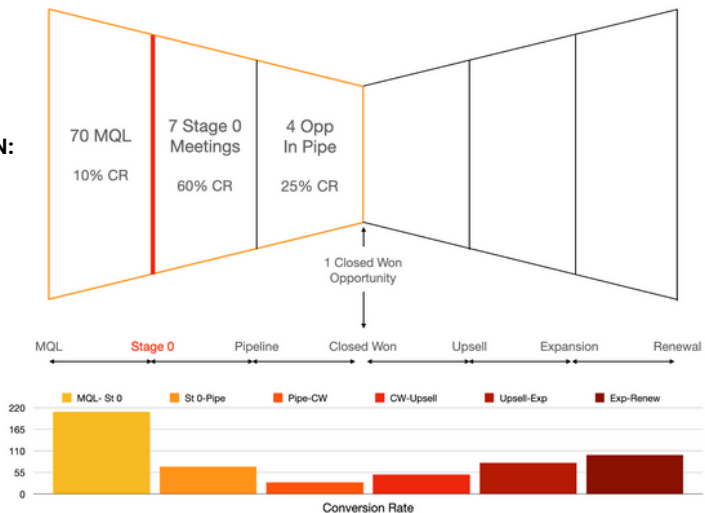




# STAGE 0 - ACCOUNTABILITY

## METRIC DEFINITION:

- Measures conversion rate from MQL → Stage 0 → Pipeline.



## BUSINESS DECISIONS:

- Is Marketing delivering quality MQLs (Quantity vs Quality)?
- Are SDR Outbound initiatives on the - ICP/Target Accounts?
- Are AEs progressing pipeline for "real" opportunities?

## BENEFITS:

- Defines clear accountability between the Marketing - SDR/BDR and the AE teams.
- Visibility SDR impact on revenue/commissions for the finance team.
- Sales cycle length.
- Standardizes KPIs between Sales, Marketing and Finance.

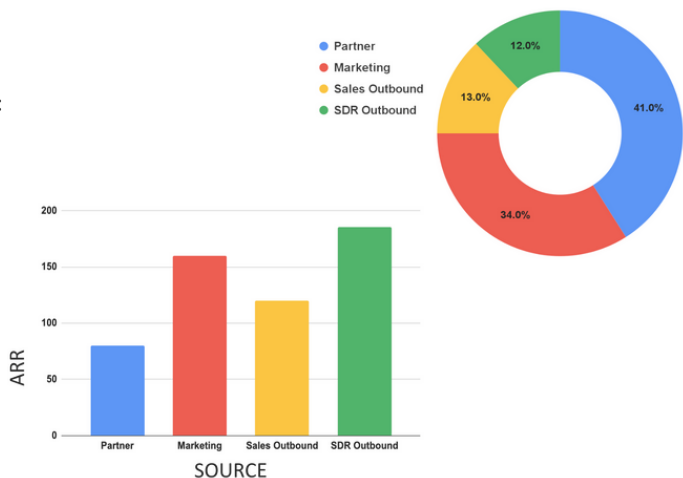


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# PIPE GEN SOURCING VS TARGETS

## METRIC DEFINITION:

- Show the lead source % by category and region for pipeline Creation and Closed Won.



## BUSINESS DECISIONS:

- Where should we invest more or less?
- How can we democratize success in other regions?
- Which team needs to lean in more?

## BENEFITS:

- Wiser allocation of funding and resources.

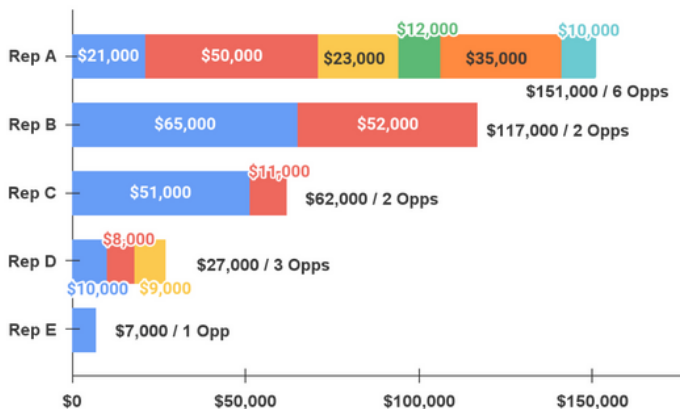


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# 12 REP PIPE GEN BY ARR

## METRIC DEFINITION:

- Shows the number of deals and respective ARR added by Reps. Reps ranked by ARR leaderboard.



## BUSINESS DECISIONS:

- Determine which reps have sufficient pipe capacity
- Which reps are at risk? Looking for Coverage 4x
- How do we train, support reps that have too much pipe?
- how do we train, support reps that do not have enough pipe?

## BENEFITS:

- Forces ownership at the rep level.
- Leadership has pipe capacity visibility.
- Fosters a hunting/sourcing mentality in the sales force.



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# WERNER SCHMIDT

CEO and Co-founder @ Lative



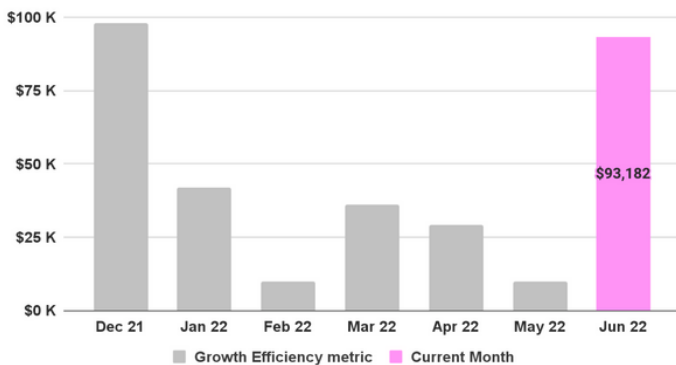
Werner Schmidt is the CEO of Lative, a capacity planning and revenue efficiency platform for high-performance revenue and finance teams. Before becoming CEO, he held roles in sales and enablement for almost two decades, including leadership positions.



# SALES PRODUCTIVITY

## METRIC DEFINITION:

- Sales Productivity in real-time.



## BUSINESS DECISIONS:

- Which areas or channels would be better to invest in?
- How to establish teams efficiently and effectively?
- How to secure sales capacity to reach targets?

## BENEFITS:

- Calculate sales productivity in real-time.
- Holistic view across teams, regions, segments and even product lines.
- Measure the effect of what RevOps and Enablement activities have on the business.

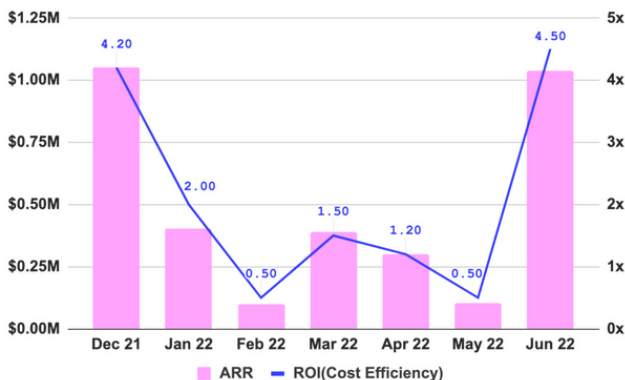


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# COST EFFICIENCY

## METRIC DEFINITION:

- Cost efficiency - return on investment on the sales team, related with ARR.



## BUSINESS DECISIONS:

- How to make smart hiring decisions?
- What's the cost vs revenue generated?
- What are the trending factors for costs and revenue?

## BENEFITS:

- Calculating return on investment.
- Comparison across teams.
- Adopting a forward-looking model.



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# JAMES MASON

Sales Operations Manager @ Scandit



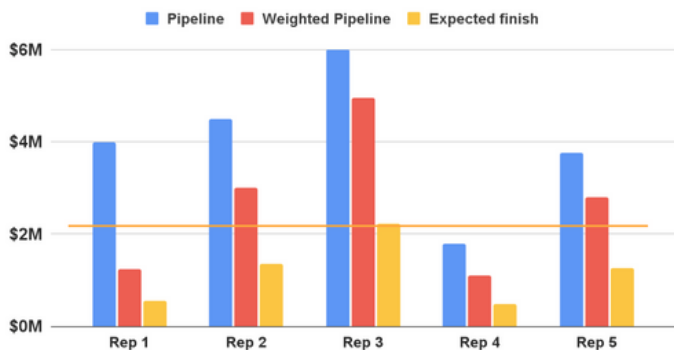
James Mason is a strategic & operational leader with more than a decade of sales operations experience. He has been driving increased revenue by providing data driven insights and implementing process efficiencies across companies in the UK.



# PIPELINE COVERAGE

## METRIC DEFINITION:

- Amount of open opportunity vs target.



## BUSINESS DECISIONS:

- Do we have enough capacity to hit targets?
- Do we need to build or progress opportunities to weak stages? (maturity & balance indicator)
- What actions are needed to either generate more or progress the pipeline?

## BENEFITS:

- Sales are more focused on how they can get to target.
- Opportunities are under the microscope more frequently.
- Identify areas of consistent challenge (either geo/rep/function based).



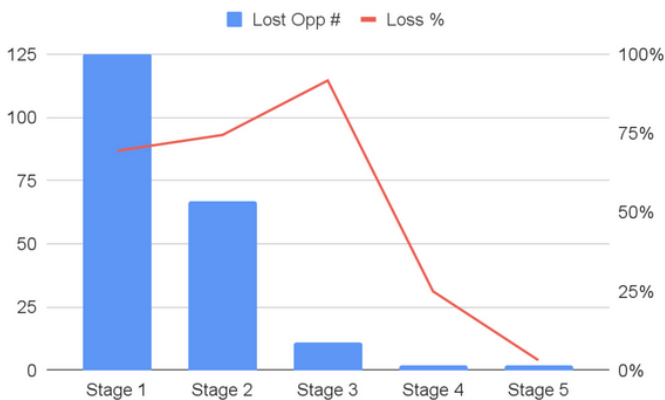
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# "WHEN- LOSS"

## METRIC DEFINITION:

- Lost opportunity volume by stage and related % ratio.



## BUSINESS DECISIONS:

- How effective is our “qualify-out” activity?
- How competitive are we as opportunities progress?
- Is there a frequent point of challenge that causes us to lose?

## BENEFITS:

- Lose less increases \$\$ retention in the pipe.
- Anticipate obstacles/risk earlier.
- Confidence in what we see is working.
- Identify enablement opportunities to improve qualification.

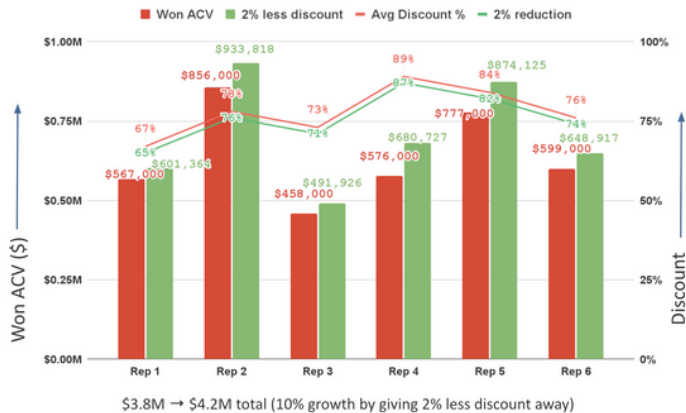


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# DISCOUNTING PRACTICE

## METRIC DEFINITION:

- Average discount on Closed Won deals by rep.



## BUSINESS DECISIONS:

- How competitive is our pricing?
- How much do we need to give away to win?
- Where can we move the needle to recoup \$?

## BENEFITS:

- Pricing challenges for future.
- Understand how sensitive sell price can be related to won number.
- Identify areas where pricing is a valid reason vs excuse.



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# ANTHONY ENRICO

CEO and Co-founder @ LeanScale



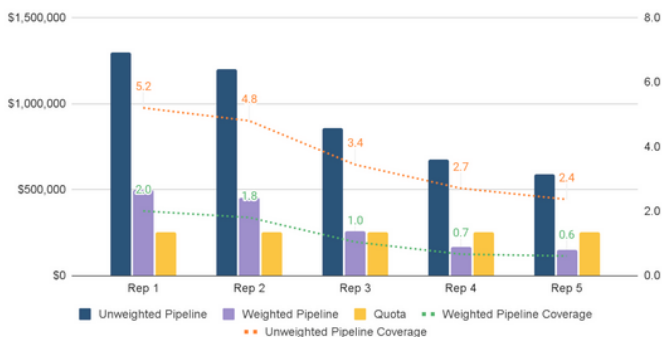
Anthony Enrico is the CEO and co-founder of LeanScale and has more than a decade of experience in GTM and RevOps roles in B2B SaaS.



# PIPELINE COVERAGE BY REP

## METRIC DEFINITION:

- Ratio of weighted and unweighted pipeline coverage by rep to period quota.



## BUSINESS DECISIONS:

- Balance territories.
- Identify top/poor performers early.
- Shift investment to the territory with the most opportunities.

## BENEFITS:

- Make sure you're not over/under-investing in your sales force.
- Easily visualize reps with higher-performing territories.
- Cut through the noise of blended pipeline coverage metrics.

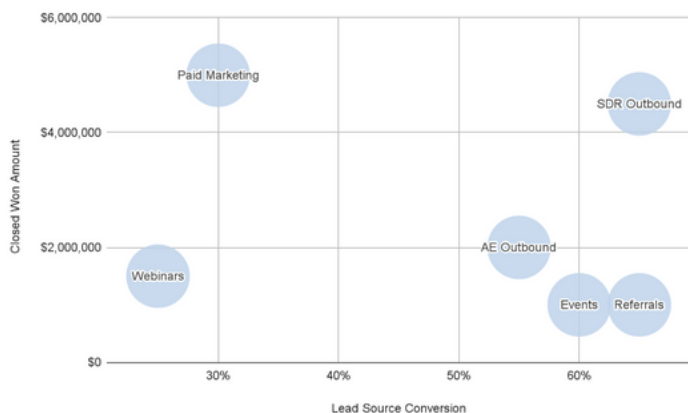


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# LEAD SOURCE IMPACT MATRIX

## METRIC DEFINITION:

- Plotting lead sources on a matrix of conversion rate and total amount of closed won opportunities.



## BUSINESS DECISIONS:

- Increase or decrease spend in a particular lead source.
- Diversify lead channels in an efficient manner.
  - Upper right - pour fuel on fire
  - Lower right - invest more if elastic
  - Upper left - decrease investment
  - Lower left - consider ignoring

## BENEFITS:

- Understand the elasticity of each lead source.
- Easily visualize top-performing lead sources rather than showing just the highest converting or highest grossing.

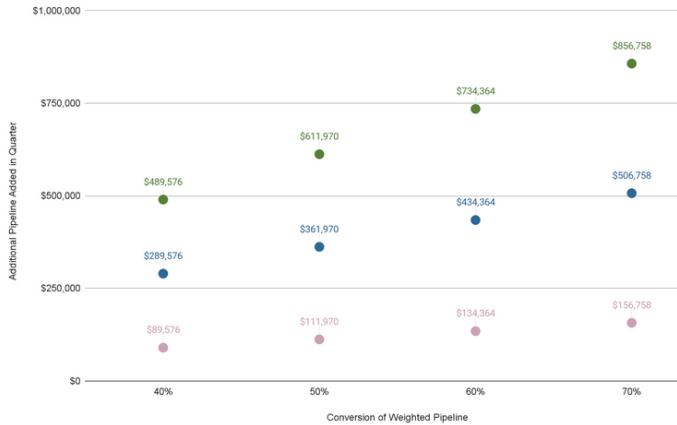


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# FORECAST SENSITIVITY ANALYSIS

## METRIC DEFINITION:

- Sensitivity analysis with created pipeline and SQL to CW conversion factors.



## BUSINESS DECISIONS:

- Plan spending and investments by likely forecast scenarios.
- Communicate potential performance outcomes.

## BENEFITS:

- Removes “superhero” expectations from forecasting.
- Paints the highest upside and potential downside scenarios.
- Avoids major surprises and creates the bounds of possibility.



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# CRAIG HANDY

Director of Revenue Operations @ York IE



After years of honing his revenue operations chops at Assent Compliance and Shopify, Craig Handy co-founded Jameson Strategies to bring winning go-to-market strategies to smaller companies in an affordable way. Now he is doing the same as part of York IE, which acquired them in 2022.

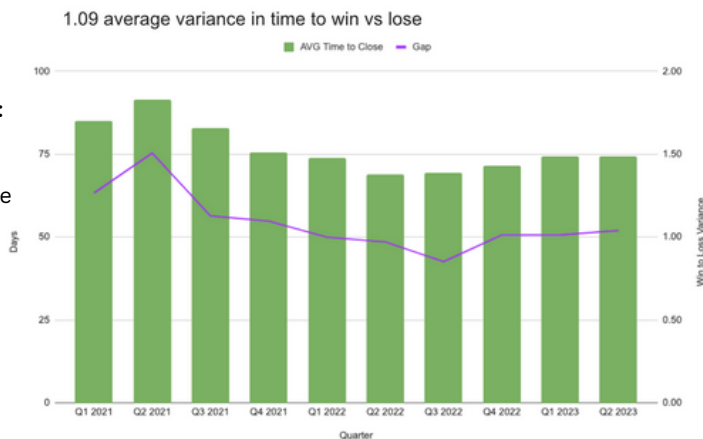


# WIN/LOSS TIME GAP



## METRIC DEFINITION:

- Difference between time to win vs time to lose deals.



## BUSINESS DECISIONS:

- Target 1.10 or less.
- Pipeline/product-specific filtering.
- If a considerable gap exists, explore further what factors contribute to that.

## BENEFITS:

- Increases forecast accuracy by helping define an error rate.
- Identifies immaturity or broken process when subfiltered by product or market.



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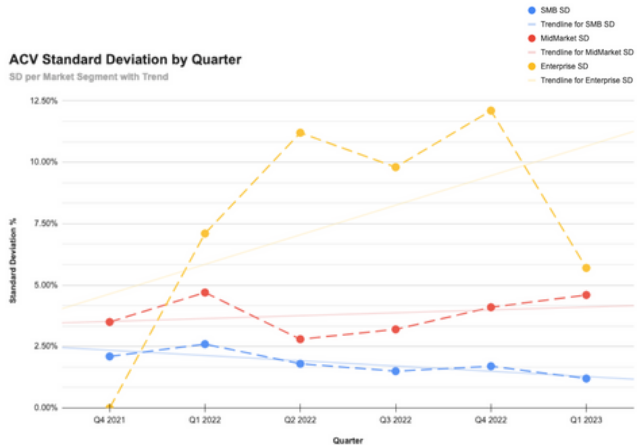


# ACV STANDARD DEVIATION

## METRIC DEFINITION:

- The deviation across the average contract value of companies in each market segment.

ACV Standard Deviation by Quarter  
SD per Market Segment with Trend



## BUSINESS DECISIONS:

- Is the deviation representative of the market segments' buying expectations (i.e: SMB deviation generally should be low)?
- What factors contribute to the most deviation and is it positive or negative in nature (i.e: selling through discounts or value ad ons)?

## BENEFITS:

- Understand anticipated variance against the ACV to improve forecasting.
- Identify problem/opportunity areas in regards to pricing or pitching.
- Foundation for deeper analysis of direction drift within pricing or factors that contribute to deviation.



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# MATT DURAZZANI

CRO @ Olumo



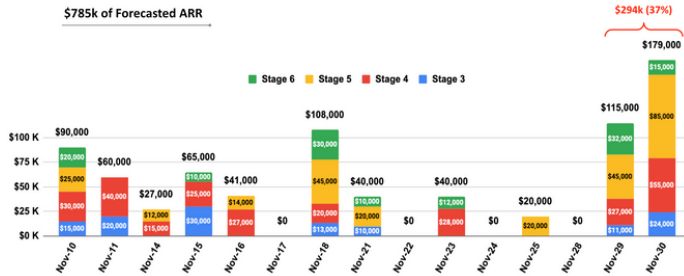
Matt Durazzani has experience both as a rep and sales leader as well as in building the operational infrastructure needed for the sales teams. Because of his personal sales experience, everything he builds has at heart the enablement of sales execution and optimization.



# RRR - RUNWAY, RISK, RESOURCES

## METRIC DEFINITION:

- Timeline of deals by Close Date and related total ARR expected to close.



## BUSINESS DECISIONS:

- What deals are at risk to push?
- What specific final steps are required?
- What internal resources can we allocate to support the deal?

## BENEFITS:

- Focus shifts from close date expectation to deal execution and strategy.
- More realistic ARR timeline.
- Engages all teams & execs.
- Reduce the risk of pushed deals.

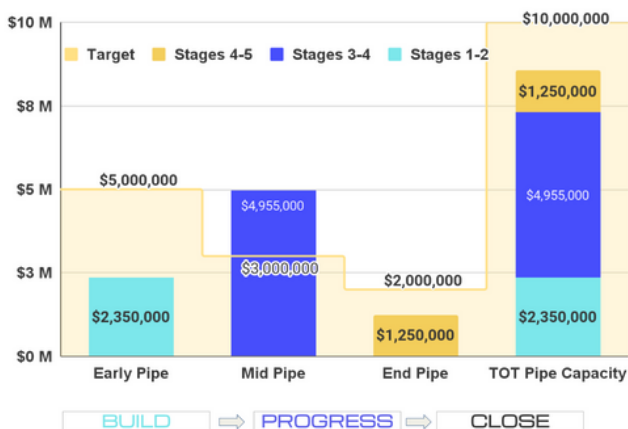


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# CAPACITY BY 'BUCKETS'

## METRIC DEFINITION:

- ARR capacity ratio vs Targets by Pipeline 'Buckets' (\*)



## BUSINESS DECISIONS:

- Do we have enough ARR capacity throughout the pipe to be able to hit our Annual ARR Target?
- Which areas of the pipe need immediate triage activity?
- Where can we find additional ARR that we can forecast?

## BENEFITS:

- Immediately identifies strong and weak points in the pipe.
- Forces the behavior of the sales team towards developing a diversified portfolio of deals vs putting all their 'eggs in one basket'.
- Empowers Sales, Marketing, and Partnership teams to collaborate in focused pipe gen efforts.
- Prioritizes which opportunities need immediate action.



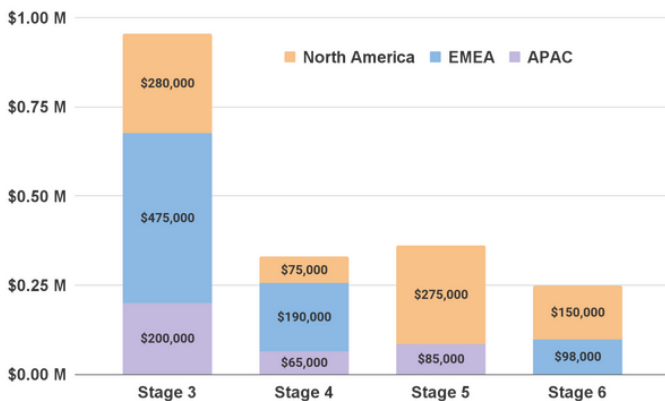
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(\*) Buckets = grouping the pipeline stages into separate buckets. Stages 1 & 2 = Early Pipe; Stages 3 & 4 = Mid Pipe; Stages 5 & 6 = End Pipe

# OPPORTUNITY DORMANCY

## METRIC DEFINITION:

- Dormant ARR by Stage 3+ and by Region that has not progressed based on velocity expectations.



## BUSINESS DECISIONS:

- How much stale ARR are we sitting on?
- What regions by stage struggle the most?
- Why are we struggling? What can we do to help our reps and their pipelines?

## BENEFITS:

- Accelerates pipe progression.
- Finds free ARR in pipeline we don't have to build from scratch.
- Identifies Sales Enablement needs.
- Rallies strategic internal resources where needed most.




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# GREG RATTRAY

Head of Revenue Operations, North America @ Airwallex



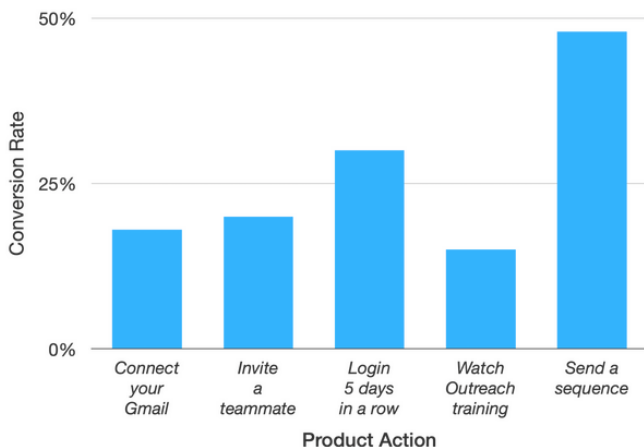
Greg Rattray is a RevOps leader with experience of more than a decade spent in different roles across revenue operations, direct sales, and also finance roles earlier in his career.



# LEAD TO OPPORTUNITY CONVERSION RATE

## METRIC DEFINITION:

- Conversion Rate over Product Qualified Leads that result in the creation of an opportunity.



## BUSINESS DECISIONS:

- Are we going after the right customers?
- What customer actions in the product can lead to the highest conversion rate?
- What actions aren't demonstrating value?
- Are we capturing and sharing the right product data with the GTM team?

## BENEFITS:

- Work with product to get more people using features that drive conversion.
- Capture the right product metrics and pass to sales.
- Adjust lead scoring and SLAs.
- Combine with Win Rate, ADS, and expected value to tell the full story.



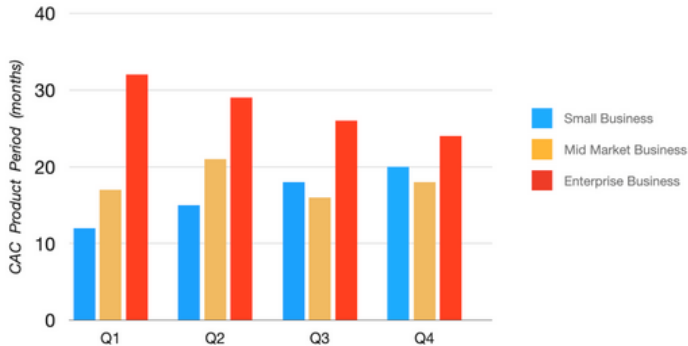
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# CAC PAYBACK PERIOD



## METRIC DEFINITION:

- The time it takes for your company to recover the cost of acquiring a customer.
- $\text{CAC Payback Period} = \text{CAC} / (\text{Revenue} - \text{Cost of Service})$ .



## BUSINESS DECISIONS:

- CAC payback period is low (GOOD)
  - Can we ramp up hiring?
  - How do we increase lead flow?
- CAC payback period is high
  - What messaging resonates and how do we make it consistent across the team?
  - Are we going after too many customers? Should we focus on upsells/expansions?
  - Does our GTM strategy work with these customers?

## BENEFITS:

- Able to understand the business health for each segment.
- Target the right audience.
- Allocate resources appropriately.
- Combine with Win Rate by competitor and more for the full picture.



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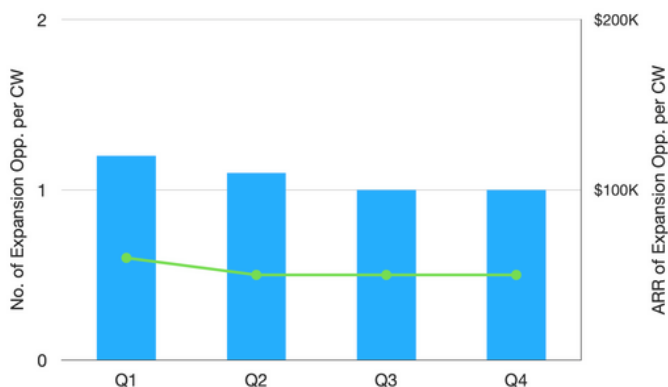




# EXPANSION OPPORTUNITY IDENTIFICATION

## METRIC DEFINITION:

- For each new customer Closed Won deal, what is the average number of expansion opps and expansion ARR identified at close?



## BUSINESS DECISIONS:

- How is this changing over time?
- Are we leaving too much on the table during our initial deal?
- How can we enable teams to be more effective in finding expansions?

## BENEFITS:

- Gives great insight into how to execute initial sales process and how to identify expansions.
- Combine with Average New Customer ARR, Expansion win rates, Average ARR and time to close for the full picture.



[Watch the full video](#)



# ANIL SOMANEY

SVP - Global Revenue Strategy & Operations @ Chargebee



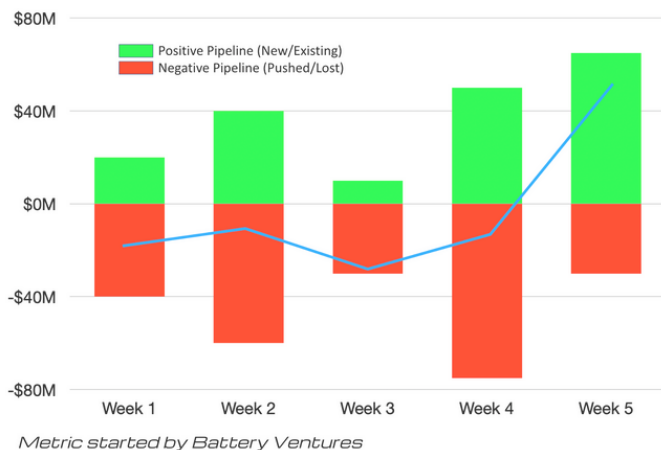
Anil Somaney is a technology-centric operations executive known for delivering complex transformational business initiatives with proven results.



# MOJO METRIC

## METRIC DEFINITION:

- + New/existing pipeline
- + Pull forward pipeline
- - Pipeline pushed
- - Pipeline shrunk or lost



## BUSINESS DECISIONS:

- How healthy is our pipeline generation machine?

## BENEFITS:

- Allows for visibility & predictability of:
  - WoW pipeline health
  - Bookings
  - Pipeline hygiene
- Deeper inspection into areas where pipeline is negative.



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# SNAP THE LINE

## METRIC DEFINITION:

- % variance at EOQ final results versus week 6 call
- Variance is -5% to +10%
- By Segment, GEO



## BUSINESS DECISIONS:

- Confidence in bookings forecast

## BENEFITS:

- Historical leader trend can help align bookings forecast and display risk/upside.
- Allows for calibration in sales forecasting methodology.

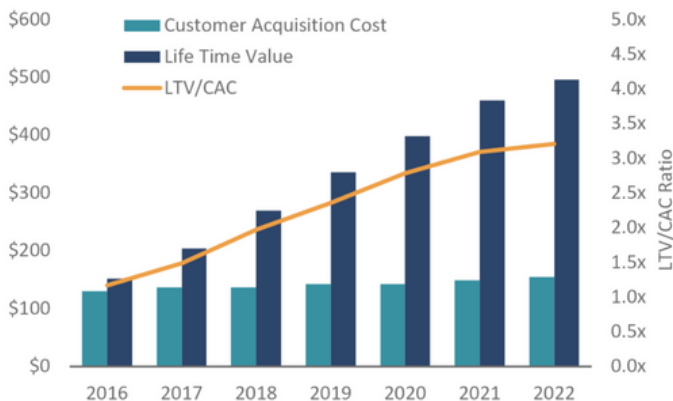


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# LTV/CAC

## METRIC DEFINITION:

- Lifetime value of a customer divided by customer acquisition cost.
- Expressed as X:Y (target 3:1).



## BUSINESS DECISIONS:

- Most critical indicator of a company's health and potential for growth and capital infusion.

## BENEFITS:

- Helps understand the leverage a company has between what the value of a customer, and the cost to acquire one.
- Allows for nimble investment decision making.



[Watch the full video](#)



# BRANDON BUSSEY

Partner @ Unicorn Revenue Operations



Brandon Bussey brings over 15 years of expertise in Go-to-Market strategy, data-driven decision-making, scalable processes, and team leadership & development across SaaS, B2B and B2C.



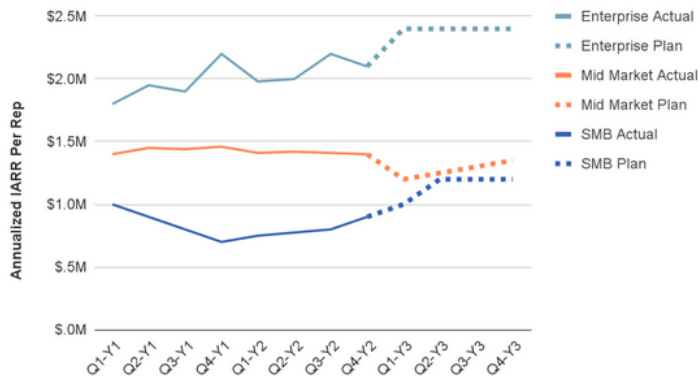
# REP PRODUCTIVITY



## METRIC DEFINITION:

- Quarterly Bookings (Annualized) / Active Reps

Rep Productivity by Segment by Quarter



## BUSINESS DECISIONS:

- ROI on Investments in additional support .
- Future plan validation.
- Org structure.

## BENEFITS:

- You can see how much your reps are producing with no fluff.
- Uncovers rep elasticity (hiring impact on productivity).

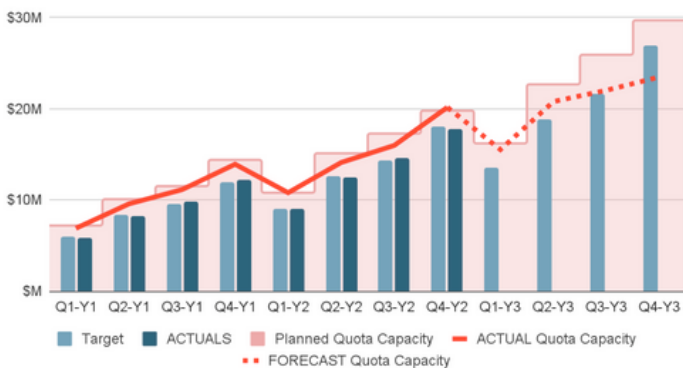


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# QUOTA CAPACITY

Quota Capacity Analysis by Quarter



## METRIC DEFINITION:

- Sum of Quotas of reps relative to target and actuals

## BUSINESS DECISIONS:

- Hiring plan.
- Additional incentive / spiff needed.

## BENEFITS:

- Long term view and see problems well ahead to be able to react.
- Adjusting hiring plans.



[Watch the full video](#)



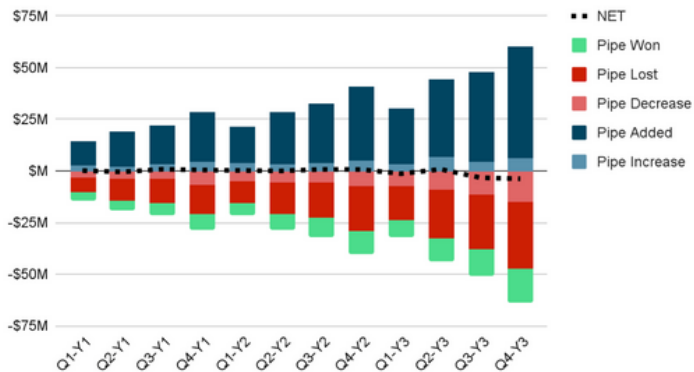
# PIPELINE REPLACEMENT



## METRIC DEFINITION:

- Pipeline Change Quarter-over-Quarter

Net Pipeline Change



## BUSINESS DECISIONS:

- Top of funnel decisions: volume vs target, capacity needs.
- Pipeline quality determination: consistent flow between variables.

## BENEFITS:

- Looking at the pipeline holistically enables us to identify future quarter problems.



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**BoostUp.ai** is the RevOps Command Center powered by **RevBI** to accelerate critical revenue insights and the adoption of revenue processes.

The platform gives RevOps full control over their revenue data to align teams and hold them accountable. It includes advanced analytics, deal review and management, and forecasting & pipeline management, built on an embedded warehouse that pre-connects sales activity, CRM and 3rd party data, and converts it into near-instant insights with out-of-the-box visualizations.

The flexibility of the platform and the ease of creating custom metrics make adoption seamless, increase predictability and forecast accuracy, and give RevOps teams the power to proactively improve revenue performance.

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