Revenue Operations Dashboard

Operationalization Guide: How to Deploy, Own & Run

Julia Ormond / RevOps Toolkit

01 WHO USES THIS DASHBOARD

This dashboard is designed for revenue-facing leaders who need a single source of truth across the full GTM funnel — from lead source through close, plus retention and forecast accuracy. Primary audiences and their use cases:

CRO / VP Revenue	Owns attainment, forecast accuracy, and pipeline health. Uses the dashboard to run weekly business reviews, prepare QBR and board packages, and make headcount and territory decisions. Primary focus: above-the-line output metrics and the attainment distribution curve.
VP Sales / Sales Leadership	Monitors rep-level attainment, deal velocity, and stage-by-stage conversion. Uses it to identify underperformers early, prioritize deal reviews, and manage forecast commits.
RevOps / Revenue Operations	The builders and primary operators. Uses the dashboard to surface operational inefficiencies, validate data quality, and produce insights for leadership. Owns below-the-line input metric definitions and data pipeline integrity.
CFO / Finance	Tracks bookings pace vs. plan, pipeline coverage, and forecast accuracy to model cash flow, headcount, and board-level reporting.
VP Marketing / Demand Gen	Monitors lead volume, MQL quality, lead-to-opportunity conversion, and contribution by source. Uses this to optimize channel spend and prioritize demand programs.
Enablement Leaders	Tracks leading indicators (activity rates, stage conversion, ramp velocity) to identify where coaching investment is most needed across BDR, AE, SC, and CSM populations.
Board / Investors	Typically a summarized above-the-line view: ARR, NRR, pipeline coverage, win rate, and forecast accuracy vs. plan.

02 THE ABOVE / BELOW THE LINE FRAMEWORK

The most important operational distinction in a revenue dashboard is the line between output metrics (what happened) and input metrics (what was done to drive it). Revenue leaders who only watch output metrics are always looking backwards. By the time ARR starts declining, the root cause happened 3-6 months earlier in the pipeline and activity data. The teams that stay ahead of the number review inputs daily and outputs weekly.

Above the Line (Output Metrics): Revenue outcomes. Lagging indicators. Cannot be managed directly — only influenced through inputs. Tell you where you are right now. Examples: Bookings, ARR Added, NRR, Win Rate, ACV, Attainment. Review cadence: weekly leadership review and board/QBR reporting.

Below the Line (Input Metrics): Activity and process metrics. Leading indicators. Can be managed directly through coaching and process change. Tell you where you are going in the next 60-90 days. Examples: Pipeline Created, Meetings Booked, Coverage Ratio, Stage Conversion Rates. Review cadence: daily operational dashboards, weekly team reviews.

The diagnostic rule: when output metrics miss, diagnose by looking at the inputs from 60-90 days prior. If pipeline creation was low then, the bookings miss was predictable. If pipeline was healthy but win rate dropped, the problem is in execution — and the stage conversion data will point to exactly where in the funnel.

03 DATA REQUIREMENTS & SOURCE CONNECTIONS

This dashboard requires live connections to three primary systems: your CRM, your marketing automation platform, and your customer success platform. Below are the minimum required fields and data standards for each. RevOps owns the data pipeline; all field additions or changes that affect dashboard calculations must go through RevOps before CRM deployment.

CRM (Salesforce / HubSpot)	Required opportunity fields: Stage, Amount (ACV), Close Date, Created Date, Owner, Lead Source, Opportunity Type (New / Expansion / Renewal), Forecast Category. Required contact fields: Role/Title, Account, Created Date. Required account fields: Segment/Tier, Territory, Industry, Current ARR. Stage changes must be timestamped — this enables time-in-stage and velocity calculations. No opportunity advances past Discovery without at least one contact linked.
Marketing Automation (HubSpot / Marketo / Pardot)	MQL date and score threshold must be agreed with Sales before being set — not defined unilaterally by Marketing. UTM tracking required on all inbound leads; no inbound lead without a source. Bidirectional CRM sync required: MQL status changes, lead-to-contact conversion events, and disqualification reasons must write back to CRM. Lead-to-Opportunity conversion requires a defined SAL stage in CRM for accurate measurement.
CS Platform (Gainsight / ChurnZero / Totango)	Health score definition and weighting must be documented and approved by RevOps + CS leadership before going live. Product usage data must be connected programmatically — manual health score entry is not permitted. Churn and contraction events must sync to CRM within 24 hours of confirmation for NRR accuracy. QBR/EBR completion and customer engagement data should be logged in the CS platform, not tracked in spreadsheets.
Data Quality Standards	Every closed-won opportunity requires: final ACV, close date, segment, and lead source filled — no exceptions. Deals missing required fields are excluded from metric calculations and flagged in the weekly RevOps data quality audit. ARR additions, churn, and contraction are reconciled with Finance monthly. Stale opportunities (no stage change in 45+ days) are flagged for manager review — not silently counted in pipeline coverage.

04 OWNERSHIP & GOVERNANCE

Every metric on this dashboard has a named owner. When a number is questioned, the owner is the escalation point — not RevOps by default. Metric definitions are not changed without a 30-day notice period, a documentation update, and RevOps sign-off. This protects trend continuity and ensures all teams are comparing the same numbers.

Metric Ownership by Function

RevOps	Owns: dashboard build and maintenance, all metric definitions (primary keeper), data pipeline integrity, access management, and the monthly data quality audit. Approves all CRM field changes that affect dashboard inputs. Produces the weekly leadership pack and quarterly board summary.
Finance	Owns: bookings validation (final sign-off), ARR calculation methodology, quota target inputs, and all board-level financial reporting numbers. Reconciles ARR additions, churn, and contraction monthly with RevOps.
Sales Leadership	Owns: quota attainment reporting, pipeline commit and forecast submission, and deal-level accuracy for all CRM opportunity data maintained by their team. Responsible for enforcing stage entry criteria and CRM hygiene within their org.
Marketing	Owns: MQL definition and scoring model, lead volume and source attribution, and lead-to-opportunity conversion quality. Escalates lead quality issues to RevOps within 5 business days of identification.
CS Leadership	Owns: health score definition and weighting, churn and contraction event logging, expansion pipeline accuracy, and QBR/EBR completion tracking. Accountable for health score predictive validity — scores must identify at-risk accounts 90+ days before renewal, not just describe churn after it happens.

Dashboard Access Model

CRO / VP Revenue	Full dashboard — all metrics, all teams, all reps. QBR and board summary export access.
VP Sales / Directors	Full dashboard for their own org. No access to peer-team rep-level data by default.
RevOps	Full dashboard plus edit and admin access. The only role that can modify metric definitions or data pipeline configurations.
CFO / Finance	Above-the-line metrics plus bookings and ARR detail. No rep-level pipeline view.
VP Marketing	Lead volume, MQL quality, L2O conversion, and pipeline by source. No financial metrics.
Enablement Leaders	Activity and conversion metrics. No financial data, no cross-rep attainment comparison.
Individual Reps	Own metrics only: attainment, pipeline, activity volume. No peer comparison access.
Board / Investors	Summarized above-the-line package produced and distributed by RevOps monthly. No live dashboard access.

Governance Standards

- Metric definition changes require RevOps sign-off and a 30-day notice period before taking effect.
- All CRM field changes affecting dashboard metrics require a RevOps review ticket before deployment.
- Dashboard is audited monthly: data completeness check, stale opportunity review, and outlier investigation.
- Benchmarks are reviewed annually and updated to reflect current business stage, segment mix, and market.
- Forecast definitions (commit, best case, pipeline) are reviewed and locked at the start of each fiscal year.
- Any metric removed from the dashboard requires a documented rationale and 60-day retention in archive view.

05 REVIEW CADENCE

This dashboard is only as valuable as the consistency with which it is reviewed. Below is the recommended cadence by audience. RevOps is responsible for ensuring the dashboard is current before each review session. Each meeting owner is responsible for coming prepared with their own read of the data — RevOps produces the data, not the analysis.

CADENCE	AUDIENCE	PRIMARY FOCUS	AGENDA & OUTPUTS
Daily (RevOps)	RevOps team	Data quality, pipeline creation pacing, activity anomalies	Spot-check new opportunities for field completeness. Flag data errors before they compound. Monitor pipeline creation vs. weekly pace target. Alert leadership if coverage drops below the defined threshold.
Weekly — Monday (Leadership Review)	CRO, VP Sales, VP Marketing, RevOps	Pipeline coverage by stage, forecast commit vs. best case, above-the-line vs. plan	Review above-the-line metrics vs. plan. Assess pipeline coverage by stage. Confirm forecast commit numbers. Assign deal review owners for at-risk opportunities. Output: weekly business review summary, deal escalation list.
Weekly — Thursday (Enablement Check)	Enablement leaders, VP Sales	Activity rates, stage conversion, ramp velocity, coaching priorities	Review BDR and AE activity metrics vs. targets. Identify stage conversion declines. Prioritize coaching interventions for the following week. Output: coaching priority list, reps flagged for 1:1 focus.

CADENCE	AUDIENCE	PRIMARY FOCUS	AGENDA & OUTPUTS
Monthly (GTM Business Review)	Full GTM leadership, Finance	All metrics vs. plan, trend analysis, prior-month action item review	Full metric review: above and below the line. Prior-month action item accountability check. Metric definition audit: surface any data quality issues. Finance reconciliation on bookings and ARR. Output: monthly business review deck, updated action log.
Quarterly (QBR + Board Prep)	CRO, Finance, Board	QBR package, board summary, target-setting and quota review for next quarter	Pull QBR package: trailing 3-quarter trends, attainment distribution, win rate by segment and competitor, NRR and GRR, forecast accuracy history. Produce board summary: above-the-line metrics only. Review quota targets and pipeline coverage ratios for the upcoming quarter. Output: QBR deck, board pack, quota letters for next quarter.

06 COACHING & ENABLEMENT RESPONSE PLAYBOOK

When the dashboard surfaces an unhealthy signal, the question is: what do you do about it? The following playbook maps signals to coaching and enablement responses by GTM role. Identify the signal in the data first, then apply the appropriate intervention. Never run an intervention program without a hypothesis grounded in the data.

BDR / SDR - Top of Funnel

Unhealthy Signals

- Meetings booked per BDR below target (< 8/month) despite normal activity volume.
- Outreach volume high but lead-to-opportunity conversion declining.
- Attended meeting rate low (no-show rate > 20%).
- MQL-to-SAL conversion declining without a change in lead source mix.
- Pipeline creation concentrated in one rep or territory while others are flat.

Enablement & Coaching Response

- Sequence audit: review open, click, and reply rates by sequence and step. Replace bottom-performing steps. Test 2-3 new subject line approaches. Kill sequences with < 2% reply rates.
- ICP training: run a list hygiene session. Ensure BDRs are targeting the right accounts, personas, and titles. Remove non-ICP companies from active sequences before adding volume.
- Message workshop: rewrite value propositions to focus on the buyer's specific pain today, not product features. Test outcome-led messaging vs. problem-led messaging.
- Call review: pull and review 5-10 recorded calls per BDR. Score on hook quality, discovery question relevance, and ability to create urgency for the meeting.
- No-show reduction: implement a confirmation workflow (email + LinkedIn touch the night before and 15 minutes before). Review whether the right persona is being booked.
- Territory review: audit account coverage and workload distribution. Ensure no rep is working more accounts than the activity model supports.

AE - Pipeline to Close

Unhealthy Signals

- Win rate declining across a rep cohort or in a specific segment.
- ACV declining while deal volume holds (discounting or downmarket ICP drift).
- Deal velocity slowing at late stages (Proposal to Negotiate, Negotiate to Close).
- Demo-to-proposal rate below 50%.
- Single-threaded deals dominating the pipeline (one contact per opportunity).
- Bimodal attainment distribution: few large wins, many reps at 0-50% of quota.

Enablement & Coaching Response

- Discovery coaching: pull discovery call recordings. Score on multi-threaded outreach, business impact uncovering, next-step commitment, and champion qualification. The discovery call is where most deals are won or lost.
- Demo effectiveness audit: review demos for customization, economic buyer framing, and relevance to the specific use case. Generic demos signal low investment to the buyer.
- Competitive playbook refresh: run a win/loss analysis by competitor. Update battlecards with current objections and differentiation. Run a live competitive deal simulation.
- Deal review cadence: institute weekly deal reviews with managers for any deal stalled > 25 days in any stage. Use a defined exit criteria checklist at every stage.
- Multi-threading program: audit the pipeline for single-threaded deals. Coach AEs on how to map buying committees and introduce the economic buyer through the champion.
- Discount governance: review discount rate by rep. Implement an approval process for deals above the defined discount threshold. Reinforce value-based selling in 1:1s.
- Forecast hygiene: enforce MEDDIC, SPICED, or equivalent criteria at stage entry. Run a pipeline hygiene session to remove stale or mis-staged deals before any commit.

SC / Solution Consultant - Technical Validation

Unhealthy Signals

- POC or trial completion rate declining (< 70%).
- POC-to-close conversion below target.
- Extended evaluation cycles (> 30 days beyond expected timeline).
- Technical win rate declining in a specific product area or integration scenario.
- Security or compliance objections surfacing late in the evaluation cycle.

Enablement & Coaching Response

- POC qualification framework: require defined success criteria, an agreed timeline, and a named sponsor before a POC begins. Unqualified POCs almost never close. This is the highest-leverage SC process change available.
- Demo customization: audit demos for relevance to the buyer's specific tech stack, data model, and use case. Off-the-shelf demos signal low investment to technical evaluators.
- Technical objection playbook: identify the top 5 technical objections from the past quarter. Build SC-specific response guides with sandbox examples for each.
- Security readiness: ensure every SC has current security documentation (SOC 2 Type II, data residency policy, pen test summary) ready before evaluation begins.
- Mutual success plan: align with the AE on a mutual close plan with clear technical milestones, a defined review date, and agreed success criteria before entering evaluation.
- Handoff quality: audit the AE-to-SC deal handoff. Ensure SCs receive full deal context, key stakeholder map, and the business case before their first call with the customer.

CSM / Customer Success - Retention & Expansion

Unhealthy Signals

- NRR declining below 110% or trending down for two consecutive quarters.
- GRR declining — gross churn increasing by segment or cohort.
- Expansion pipeline below target or expansion conversion declining.
- QBR or EBR completion rate below 80%.
- Customer health scores declining across a cohort.
- Time-to-first-value extending beyond onboarding benchmarks.
- Low product usage or feature adoption in the first 90 days post-close.

Enablement & Coaching Response

- Onboarding review: audit the onboarding playbook for time-to-first-value. Ensure the Sales-to-CS handoff includes: champion name and contact, business case, key stakeholders, and agreed success metrics from the original deal.
- Health score recalibration: review leading health indicators (login rate, feature adoption, support ticket volume and sentiment). Ensure health scores predict churn 90+ days in advance, not just describe it after the fact.
- EBR / QBR program: audit EBR completion rate by CSM. Coach CSMs on executive business review facilitation: how to frame ROI, how to open an expansion conversation, and how to requalify the champion with the economic buyer present.

- Expansion motion: build an expansion playbook. Map trigger events (new team, headcount growth, contract renewal, new product launch) to specific expansion plays by product or tier. CSMs should not wait for customers to ask.
- Churn cohort analysis: run a retrospective churn analysis by segment, tenure, and product adoption tier. Identify the 2-3 leading indicators that predicted churn 90 days before it happened. Build an early warning system from these.
- Early warning system: identify customers showing two or more declining health indicators and trigger a proactive save motion immediately. Do not wait for a renewal conversation to surface a customer at risk.
- Sales-CS alignment: ensure CSMs are included in deal reviews for strategic accounts. CSMs who understand the original business case can reinforce value and identify expansion opportunities earlier and with more credibility.