

REVOPS DEEP DIVE

Report Gathering Guide

Tier 2 Assessment — 70 Metrics from Operational Reports

8 Reports · 8 Arms · 3–7 Days

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How to Use This Guide

The Deep Dive evaluates 70 operational metrics — 64 across eight arms (8 per arm) plus 6 coordination metrics. Unlike the Pulse Check, these metrics come from actual data in your operational systems, not from memory.

This guide tells you exactly which report to pull from which system for each metric. You don't need all 70 — the minimum is 42 (60%). Skip entire arms that don't apply to your business (e.g., Professional Services).

Estimated total data gathering time: 4–6 hours spread across 3–7 days. Your progress saves automatically. Close and come back anytime.

Reports Summary

#	Arm	Report to Pull	Est. Time	Metrics
1	Sales Operations	CRM Pipeline Report	30 min	8
2	Marketing Operations	Marketing Performance Dashboard	30 min	8
3	Customer Success	Customer Health / Retention Report	45 min	8
4	Order-to-Cash	AR Aging + Billing Summary	20 min	8
5	Pricing & Finance	Financial Summary / P&L Excerpt	30 min	8
6	Professional Services	PS Utilization / Project Status	20 min	8
7	Data, Tech & Reporting	System Usage / Tech Stack Audit	45 min	8
8	Planning & Strategy	Territory / Quota / Planning Report	30 min	8
	Coordination Intelligence	Cross-functional Data Pull	30 min	6

Tip: Pull each report once and you'll have the data for all metrics in that section. Don't pull reports metric-by-metric.

Arm 1: Sales Operations

Report: CRM Pipeline Report

Systems: Salesforce, HubSpot CRM, Pipedrive, Dynamics 365

How to Pull This Report

- Salesforce: Reports → New Report → Opportunities. Add columns: Amount, Stage, Close Date, Created Date, Owner. Filter: last 4 quarters. Group by Stage for funnel view, by Owner for territory analysis.
- HubSpot: Reports → Sales → Deal reports. Use Deal Pipeline, Deal Velocity, and Forecast reports. Export if needed for manual calculations.
- Pipedrive: Insights → Revenue Forecast + Deal Conversion + Deal Duration reports.
- Dynamics 365: Sales Hub → Analytics → Sales Pipeline. Or Reports → Opportunity Analysis.

Metrics

ID	Metric	Unit	Where to Find It
S01	Average Sales Cycle	days	CRM Pipeline/Velocity report. Average the 'Age' or 'Days to Close' field for closed-won deals.
S02	Pipeline Coverage Ratio	ratio	Sum open qualified pipeline from CRM. Divide by quota target from your comp plan. 3x+ is healthy.
S06	Overall Win Rate	%	CRM Win/Loss report. $\text{Closed-Won count} \div (\text{Closed-Won} + \text{Closed-Lost}) \times 100$.
S07	Stage 1 → 2 Conversion	%	CRM Stage Conversion or Funnel report. $\text{Deals reaching Stage 2} \div \text{Deals entering Stage 1}$.
S10	Forecast Accuracy	%	CRM Forecasting module. Compare commit amount at quarter start vs actual closed-won at quarter end.
S14	Territory Quota Attainment Gini	coefficient	Export quota attainment by rep. If very uneven $\approx 0.5+$, moderately uneven ≈ 0.3 , fairly even ≈ 0.15 .
S17	CRM Data Completeness	%	CRM Data Quality tool. Or export opportunities, $\text{count populated required fields} \div (\text{records} \times \text{required fields})$.
S22	Voluntary Rep Turnover	%	HR/People team. $\text{Voluntary departures} \div \text{average headcount} \times 100$ for last 12 months.

Arm 2: Marketing Operations

Report: Marketing Performance Dashboard

Systems: HubSpot Marketing, Marketo, Pardot, Google Analytics

How to Pull This Report

- HubSpot: Marketing → Analytics for traffic/leads. Reports → Attribution for revenue attribution. Email → Health for deliverability.
- Marketo: Analytics → Revenue Explorer for lead lifecycle and program ROI. Email Performance for deliverability.
- Pardot: Reporting → Lifecycle for stage conversion. Marketing Assets → Email for deliverability.
- Google Analytics: Acquisition → Source/Medium for channel performance. Conversions → Attribution.

Metrics

ID	Metric	Unit	Where to Find It
M01	MQL-to-SQL Conversion Rate	%	MAP Lifecycle Stage report. MQLs moved to SQL ÷ total MQLs.
M02	SQL-to-Opportunity Conversion	%	MAP/CRM cross-reference. New opportunities from SQL sources ÷ total SQLs.
M06	Marketing ROI	%	MAP Attribution report + Finance for total spend. (Attributed revenue ÷ spend) × 100.
M07	Cost per MQL	\$	Finance provides total marketing spend. MAP provides MQL count. Divide.
M10	Marketing Sourced Pipeline	%	CRM Pipeline by Source report. Marketing-sourced pipeline ÷ total pipeline × 100.
M12	Multi-touch Attribution Coverage	%	MAP Attribution report. Deals with touchpoint data ÷ total closed deals.
M14	MAP Utilization	%	Audit your MAP: email, workflows, scoring, forms, social, ads, reporting, CTAs, landing pages. Count active ÷ available.
M23	Database Deliverability	%	MAP Email Health report. Successfully delivered ÷ total sent × 100.

Arm 3: Customer Success

Report: Customer Health / Retention Report

Systems: Gainsight, ChurnZero, Totango, Vitally, Zendesk, Intercom

How to Pull This Report

- Gainsight: Dashboards → Retention for GRR/NRR. Revenue for expansion. CTAs for onboarding metrics.
- ChurnZero: Analytics → Revenue for retention. Health for scoring. Segments for distribution.
- No CS platform: Build from billing + CRM. Export customer list, map renewals, calculate retention manually.
- Support SLAs: Zendesk → Explore → SLA report. Intercom → Reports → Team Performance. Freshdesk → Reports.

Metrics

ID	Metric	Unit	Where to Find It
C01	Gross Retention Rate	%	CS platform or Finance ARR report. $(\text{Beginning ARR} - \text{Churn} - \text{Contraction}) \div \text{Beginning ARR} \times 100$.
C02	Net Revenue Retention	%	ARR Bridge report. $(\text{Beginning ARR} + \text{Expansion} - \text{Contraction} - \text{Churn}) \div \text{Beginning ARR} \times 100$.
C07	Expansion Revenue Rate	%	CS platform or CRM. $\text{Customers with upsell/cross-sell} \div \text{total active customers} \times 100$.
C11	First Response Time	hours	Support platform SLA report. Zendesk: Explore → First Reply Time. Intercom: Reports → Median First Response.
C13	First Contact Resolution	%	Support platform FCR report. $\text{Single-reply resolutions} \div \text{total tickets} \times 100$.
C16	Time to First Value	days	CS onboarding report or product analytics. Average days from contract signed to first defined value event.
C19	Feature Adoption Rate	%	Product analytics (Pendo, Mixpanel, Amplitude). $\text{Key features with monthly active usage} \div \text{total key features}$.
C22	NPS Score	score	Survey tool (Delighted, Wootric) or CS platform NPS dashboard. $\% \text{ Promoters (9-10)} - \% \text{ Detractors (0-6)}$.

Arm 4: Order-to-Cash

 **Report:** AR Aging Report + Billing Summary
Systems: NetSuite, QuickBooks, Zuora, Chargebee, Xero

How to Pull This Report

- NetSuite: Reports → Financial → AR Aging Summary. Also: Credit Memo report, Invoice listing.
- QuickBooks: Reports → Customers → AR Aging Summary. Reports → Sales → Credit Memos.
- Zuora: Reporting → AR Aging. Billing → Invoice accuracy. Payments → Collections.
- Xero: Reports → Aged Receivables Summary.

Metrics

ID	Metric	Unit	Where to Find It
O01	Quote-to-Cash Cycle	days	Cross-reference CPQ/CRM quote date with billing system payment date. Average across recent deals.
O04	Invoice Accuracy Rate	%	Billing system. $(\text{Total invoices} - \text{invoices requiring correction}) \div \text{total invoices} \times 100$.
O05	Credit Memo Rate	%	ERP/Billing credit memo report. $\text{Credit memos issued} \div \text{total invoices} \times 100$.
O08	Days Sales Outstanding	days	AR Aging report. $\text{Total AR} \div (\text{Annual Revenue} \div 365)$.
O09	Current AR Percentage	%	AR Aging report. $\text{Current (not overdue) bucket} \div \text{Total AR} \times 100$.
O12	Deal Desk Turnaround	hours	Deal desk tracking or estimate from recent non-standard deals. Time from submission to approval.
O18	End-to-End Automation Rate	%	Map your process: quote, approval, contract, billing, invoicing, collection, rev rec, reporting. $\text{Count automated} \div \text{total}$.
O19	Manual Touchpoints per Deal	count	Walk through a recent deal. Count every manual data entry, copy/paste, email approval, or system transfer.

Arm 5: Pricing & Finance

Report: Financial Summary / P&L Excerpt

Systems: ERP, FP&A tool (Adaptive, Mosaic, Cube), Board deck, Baremetrics, ChartMogul

How to Pull This Report

- Board deck: Most of these metrics live in the CFO's board deck or monthly financial review. Ask finance for the latest.
- SaaS metrics tools: Baremetrics, ChartMogul, ProfitWell auto-calculate LTV, CAC, retention from billing data.
- ERP (NetSuite/QBO): P&L for Gross Margin, Revenue. Budget vs Actual for forecast accuracy.
- HR: Provides total sales compensation data for comp-to-revenue calculation.

Metrics

ID	Metric	Unit	Where to Find It
F01	Price Realization Rate	%	CRM discount report or CPQ. Average selling price ÷ list price × 100 across closed-won deals.
F04	Revenue Forecast Accuracy	%	FP&A Budget vs Actual report. $(1 - \text{Forecast} - \text{Actual} \div \text{Actual}) \times 100$.
F07	LTV:CAC Ratio	ratio	SaaS metrics tool or calculate: $\text{LTV} = (\text{ARPA} \times \text{Gross Margin}) \div \text{Churn Rate}$. Divide by CAC.
F08	CAC Payback Period	months	$\text{CAC} \div (\text{Monthly Revenue Per Customer} \times \text{Gross Margin } \%)$.
F09	Gross Margin	%	P&L / Income Statement. $(\text{Revenue} - \text{COGS}) \div \text{Revenue} \times 100$.
F12	Sales Comp as % Revenue	%	HR for total sales comp (base + variable). Finance for revenue. Divide.
F15	Monthly Close Time	days	Finance team. Days from month-end to books finalized.
F18	Cash Conversion Cycle	days	Finance. $\text{DIO} + \text{DSO} - \text{DPO}$ (Days Inventory + Days Sales Outstanding - Days Payable Outstanding).

Arm 6: Professional Services

Report: PS Utilization / Project Status

Systems: Kantata (Mavenlink), Certinia (FinancialForce), Harvest, Toggl, Jira/Asana

How to Pull This Report

- Kantata: Reports → Utilization, Project Financials, Resource Allocation.
- Certinia: Dashboards → PS Cloud → Utilization, Backlog, Revenue.
- No PSA: Use time tracking (Harvest, Toggl) + project management (Asana, Jira) + manual margin calc.
- Skip this entire section if your company does not have a Professional Services function.

Metrics

ID	Metric	Unit	Where to Find It
P01	Average Project Margin	%	PSA Project Profitability report. $(\text{Revenue} - \text{Costs}) \div \text{Revenue} \times 100$, averaged.
P04	Scope Change Impact	%	PSA or PM tool. $\text{Projects with approved change orders} \div \text{total projects}$.
P05	Billable Utilization	%	PSA or time tracking. $\text{Billable hours logged} \div \text{total available hours} \times 100$.
P06	Bench Rate	%	PSA Resource Availability. $\text{Unassigned staff} \div \text{total PS headcount} \times 100$.
P08	On-Time Completion Rate	%	PSA or PM tool. $\text{Completed on time} \div \text{total completed} \times 100$.
P10	Go-Live Success Rate	%	PM tool. $\text{Implementations without P1 issues} \div \text{total implementations}$.
P12	Delivery CSAT	%	Post-project survey results. $\text{Positive ratings} \div \text{total ratings} \times 100$.
P15	PS Attach Rate	%	CRM. $\text{Closed-won deals with PS component} \div \text{total closed-won deals} \times 100$.

Arm 7: Data, Tech & Reporting

Report: System Usage / Tech Stack Audit

Systems: CRM Admin, Integration Platform (Workato, Zapier, Tray.io), BI Tools (Tableau, Looker, Power BI)

How to Pull This Report

- CRM Admin: Salesforce Setup → Data Quality. HubSpot Settings → Data Quality. Check duplicate management tools.
- Integration platform: Workato → Activity log. Zapier → Task History. Check error rates in failed ÷ total.
- BI Tools: Tableau Admin → Views. Looker Admin → System Activity. Power BI Admin → Usage Metrics.
- Manual audit: List every revenue tool. For each: features used vs available, active users vs licenses.

Metrics

ID	Metric	Unit	Where to Find It
D01	Data Accuracy Rate	%	Sample 100+ CRM records. Verify key fields (name, email, company, title). Accurate ÷ total sampled.
D02	Duplicate Record Rate	%	CRM Duplicate Management tool. Duplicates found ÷ total records × 100.
D05	Cross-System Consistency	%	Pick 5–10 shared fields. Sample 50 records. Check match rate across CRM/MAP/billing.
D06	Integration Error Rate	%	Integration platform error logs. Failed transactions ÷ total transactions × 100.
D08	Tech Stack Utilization	%	Per major tool: features used monthly ÷ total available features. Average across stack.
D11	Report Usage Rate	%	BI tool usage analytics. Dashboards viewed ≥1x/week ÷ total built × 100.
D15	Data Governance Coverage	%	Audit: data domains with ownership + quality rules + archival policies ÷ total data domains.
D22	KPI Definition Consistency	%	Survey: ask sales, marketing, CS, finance to define shared KPIs. Count consistent definitions ÷ total.

Arm 8: Planning & Strategy

Report: Territory / Quota / Planning Report

Systems: Xactly, Anaplan, CRM quota reports, Finance/FP&A, HR/Recruiting

How to Pull This Report

- Xactly / CaptivateIQ: Quota attainment reports, territory analytics, comp plan performance.
- Anaplan: Planning model outputs for capacity, territory, quota.
- CRM: Salesforce Forecasting → Quota Attainment view. HubSpot Goals. Pipedrive Insights.
- Spreadsheets: Most companies track territory/quota in Excel. Export attainment data from CRM.

Metrics

ID	Metric	Unit	Where to Find It
G01	Territory Balance Score	%	Territory planning tool or CRM. Compare pipeline/revenue by territory. How even is the distribution?
G02	Market Coverage Rate	%	TAM account list. Accounts with assigned rep ÷ total addressable accounts × 100.
G06	Quota Attainability Rate	%	CRM or comp tool. Reps at ≥80% quota ÷ total quota-carrying reps × 100.
G10	Capacity Model Accuracy	%	Compare last year's hiring/capacity plan vs what actually happened.
G11	Hiring Plan Attainment	%	HR/Recruiting. Hires filled by target date ÷ total planned hires × 100.
G14	Partner Program Maturity	1-5	Self-assess: 1=none, 2=ad hoc, 3=structured, 4=scaled with enablement, 5=strategic ecosystem.
G19	GTM Plan Documentation	%	Audit: ICP, personas, playbooks, battle cards, pricing guides, SOPs, territory plans. Documented ÷ total needed.
G23	Annual Planning Completion	%	Planning milestones on time (territories, quotas, comp plans, hiring, budget, GTM) ÷ total milestones.

Coordination Intelligence

These 6 metrics measure how well your 8 operational arms work together. They require joining data across multiple systems — marketing + sales + CS + finance.

ID	Metric	Unit	Where to Find It
R01	Lead-to-Revenue Cycle Time	days	Join MAP first-touch date with CRM closed-won date. Average across closed-won deals.
R02	Cross-functional SLA Compliance	%	Track SLAs: MQL follow-up time, deal-to-CS handoff, escalation response. Met ÷ total.
R05	Unified Forecast Accuracy	%	Add up all revenue stream forecasts vs actual total revenue. $(1 - \text{Forecast} - \text{Actual} \div \text{Actual}) \times 100$.
R06	Process Compliance Rate	%	Audit 50 recent deals/tickets. Count those following all process steps. Compliant ÷ total.
R10	RevOps Maturity Score	1-5	1=no function, 2=shared admin, 3=dedicated but siloed, 4=unified team, 5=strategic RevOps.
R12	Metric Consistency Score	%	List 15 shared KPIs. Ask each team to define them. Count identical definitions ÷ total.

What Happens After You Submit

AI-powered analysis: Your 70 metrics are processed through the RevOps Octopus engine with strategic AI analysis. Results are generated within 60 seconds.

Your Deep Dive report includes: Overall score + coordination score, all 8 arm scores with category-level breakdowns (4 categories per arm), AI priority matrix ranked by revenue impact, peer benchmark comparison, 30/60/90 day action plan, and a downloadable PDF.

Included walkthrough call: Ifeanyi Chukwudebe schedules a call to walk through your findings, explain the coordination patterns, and discuss implementation options.

Score Interpretation

Score	Status	What It Means
80–100	Healthy	Operations running well. Fine-tune and maintain competitive advantage.
60–79	Needs Attention	Functional with gaps. Targeted 4–8 week engagement addresses root causes.
40–59	At Risk	Significant issues across multiple arms. Revenue leakage likely. 6–12 week engagement recommended.
0–39	Critical	Systemic failure. Urgent structured intervention needed. Full Methodology recommended.

Start your Deep Dive at therevopsguide.com/tier2-assessment