REVOPS PULSE CHECK

Preparation Guide

Tier 1 Assessment — 27 Key Metrics

Answer from memory or pull real data — your choice

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What Is the Pulse Check?

The RevOps Pulse Check evaluates your revenue operations across eight critical arms plus coordination intelligence using 27 key operational metrics. It takes 20–30 minutes from memory, or 60–90 minutes if you pull real data from your systems.

⚡ Quick Path: From Memory

20–30 minutes

Use your day-to-day knowledge. Your gut feel on these numbers is usually within 15% of reality. The engine adjusts confidence automatically.

📊 Precise Path: From Reports

60–90 minutes

Pull actual numbers from your CRM, billing, finance, and CS systems. Each metric below includes where to find the real data and the calculation formula.

Mix and match: Use real data for metrics you can quickly pull, and memory for the rest. The engine handles both. Minimum 14 of 27 required.

Before You Start

If your company doesn’t have a Professional Services function, skip that section (3 metrics). That’s normal.

Don’t guess wildly on numbers you have zero feel for. A skipped metric is better than a bad guess.

The 27 Metrics

Each metric shows the question you'll be asked, how to answer from memory, where to find the real number, and the calculation formula.

Sales Operations

📋 **Report:** CRM Pipeline Report | **Systems:** Salesforce, HubSpot CRM, Pipedrive, Dynamics 365

S01 Average Sales Cycle — *days*

Question: How many days from opportunity creation to close on average?

⚡ **From memory:** Think about your typical deal. From the day it enters your pipeline to the day it closes. Your estimate is fine — most leaders are within 15% of the real number.

📊 **From reports:** CRM → Pipeline/Velocity Report. Salesforce: Reports → Opportunities → Closed Won → average the 'Age' field. HubSpot: Reports → Sales → Deal Velocity → 'Days to Close'. Pipedrive: Insights → Deal Duration.

🧮 **Calculation:** *Sum of (Close Date - Created Date) for all closed-won deals ÷ number of deals.*

S06 Overall Win Rate — *%*

Question: What percentage of qualified opportunities do you close?

⚡ **From memory:** Of deals that get to proposal or demo stage, roughly how many do you win? Most B2B companies are 15–30%.

📊 **From reports:** CRM → Win/Loss Report. Salesforce: Reports → Opportunities → filter Closed (Won + Lost) → Won Count ÷ Total. HubSpot: Reports → Sales → Deal Win Rate. Pipedrive: Insights → Deal Conversion.

🧮 **Calculation:** *Closed-Won Deals ÷ (Closed-Won + Closed-Lost) × 100.*

S10 Forecast Accuracy — *%*

Question: How close is your quarterly forecast to actual results?

⚡ **From memory:** Last quarter, what did you commit to close vs what actually closed? 100% = perfect. Most teams are 60–85%.

📊 **From reports:** CRM → Forecasting module. Salesforce: Forecasts → History → compare Commit vs Actual. HubSpot: Forecasting → previous periods. Clari: Analytics → Forecast Accuracy.

🧮 **Calculation:** *(1 - |Committed Forecast - Actual Closed| ÷ Actual Closed) × 100.*

Marketing Operations

📋 **Report:** Marketing Performance Dashboard | **Systems:** HubSpot Marketing, Marketo, Pardot, Google Analytics

M01 MQL-to-SQL Conversion Rate — *%*

Question: What percentage of marketing qualified leads become sales qualified?

⚡ **From memory:** Of the leads marketing sends over, how many does sales accept as real? 25–40% is typical.

📊 **From reports:** MAP → Lifecycle Stage report. HubSpot: Reports → Contacts → Lifecycle Stage funnel (MQL→SQL). Marketo: Analytics → Revenue Explorer → Lead Analysis → stage conversion. Pardot: Reporting → Lifecycle.

🧮 **Calculation:** *Leads moved to SQL status ÷ Total MQLs in period × 100.*

M09	Customer Acquisition Cost	$

Question: Total sales + marketing cost to acquire one new customer?

⚡ **From memory:** Add your total S&M spend for a quarter. Divide by new customers. Don't overthink it — a rough number works.

📊 **From reports:** Finance for total S&M expense. CRM for new customer count. SaaS tools: Baremetrics → CAC, ChartMogul → CAC, ProfitWell → Unit Economics (auto-calculated from billing data).

🧮 **Calculation:** *(Total Sales Expense + Total Marketing Expense) ÷ New Customers Acquired.*

M10	Marketing Sourced Pipeline	%

Question: What percentage of pipeline originated from marketing efforts?

⚡ **From memory:** Of your current pipeline, roughly what came from a marketing lead vs sales outbound? Many B2B SaaS companies are 30–50%.

📊 **From reports:** CRM → Pipeline by Source report. Salesforce: Reports → Opportunities → Group by Lead Source → filter marketing sources → sum Amount ÷ total. HubSpot: Reports → Deals → filter by Original Source Type.

🧮 **Calculation:** *Marketing-sourced pipeline value ÷ Total pipeline value × 100.*

Customer Success

📋 **Report:** Customer Health / Retention Report | **Systems:** Gainsight, ChurnZero, Totango, billing data, Zendesk/Intercom

C01	Gross Retention Rate	%

Question: What percentage of revenue do you retain before upsells? (100% = no churn)

⚡ **From memory:** If you had $1M in ARR a year ago, how much of that same $1M renewed? Don't count new upsells.

📊 **From reports:** CS platform → Retention Dashboard. Gainsight: Retention → Gross Revenue Retention. ChurnZero: Analytics → Revenue → GRR. Or Finance ARR report / Board deck ARR waterfall.

🧮 **Calculation:** *(Beginning ARR - Churn - Contraction) ÷ Beginning ARR × 100.*

C02	Net Revenue Retention	%

Question: Revenue retention including expansions? (>100% means growth from existing)

⚡ **From memory:** Same as above but now include upsells and expansions. Over 100% means existing customers are growing.

📊 **From reports:** CS platform or Finance. Gainsight: ARR Bridge → NRR. ChartMogul: Metrics → Net MRR Retention Rate. Baremetrics: SaaS Metrics → Net Revenue Retention. Board deck ARR waterfall chart.

🧮 **Calculation:** *(Beginning ARR + Expansion - Contraction - Churn) ÷ Beginning ARR × 100.*

C22	NPS Score	score (-100 to 100)

Question: Your Net Promoter Score?

⚡ **From memory:** If you've surveyed customers recently, what's the score? If you haven't surveyed, skip this one.

📊 **From reports:** Survey tool → NPS Dashboard. Delighted: Dashboard → NPS. Wootric: Dashboard → NPS. SurveyMonkey: Results → NPS question. Gainsight: Surveys → NPS. HubSpot: Service → Feedback Surveys → NPS.

🧮 **Calculation:** *% Promoters (9–10 ratings) minus % Detractors (0–6 ratings).*

Order-to-Cash

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

O01	Quote-to-Cash Cycle	days

Question: Days from quote creation to cash received?

⚡ **From memory:** From the moment you send a quote to the moment payment hits your account. Include negotiation and billing time.

📊 **From reports:** Cross-reference CPQ/CRM quote created date with billing system payment received date. Salesforce CPQ: Reports → Quotes → Created Date. Match with ERP payment date. PandaDoc/DocuSign: Analytics → Document lifecycle.

🧮 **Calculation:** *Average(Payment Received Date - Quote Created Date) across recent deals.*

O04	Invoice Accuracy Rate	%

Question: What percentage of invoices are error-free on first send?

⚡ **From memory:** How often do invoices go out correctly the first time? If you rarely issue credit memos, you're probably above 95%.

📊 **From reports:** ERP/Billing → Credit Memo report. NetSuite: Reports → Financial → Credit Memos count ÷ Invoice count. QuickBooks: Reports → Sales → Credit Memos vs Invoices. Zuora: Billing → invoice adjustment rate.

🧮 **Calculation:** *(Total Invoices - Invoices Requiring Correction) ÷ Total Invoices × 100.*

O08	Days Sales Outstanding	days

Question: Average days to collect payment after invoicing?

⚡ **From memory:** Once you send an invoice, how long until you get paid? Net-30 terms often means 40–50 days in practice.

📊 **From reports:** ERP → AR Aging Report. NetSuite: Reports → Financial → AR Aging Summary. QuickBooks: Reports → Customers → AR Aging. Xero: Reports → Aged Receivables. Zuora: Reporting → AR Aging.

🧮 **Calculation:** *Total Accounts Receivable ÷ (Annual Revenue ÷ 365).*

Pricing & Finance

📋 **Report:** Financial Summary / P&L Excerpt | **Systems:** ERP, FP&A tools (Adaptive, Mosaic, Cube), Board deck, Baremetrics, ChartMogul

F04	Revenue Forecast Accuracy	%

Question: How accurate is your revenue forecast vs actuals? (100% = perfect)

⚡ **From memory:** Finance's revenue projection vs what actually came in. Different from sales forecast — this is the CFO's number.

📊 **From reports:** FP&A → Budget vs Actual report. Adaptive: Reports → Budget vs Actual → Revenue line. Mosaic: Dashboards → Forecast Accuracy. NetSuite: Reports → Budget vs Actual. Or simply ask Finance.

🧮 **Calculation:** *(1 - |Forecast Revenue - Actual Revenue| ÷ Actual Revenue) × 100.*

F07	LTV:CAC Ratio	ratio

Question: Customer lifetime value divided by acquisition cost? (3.0+ is healthy)

⚡ **From memory:** If a customer is worth $30K lifetime and costs $10K to acquire, that's 3.0. Estimate if unsure.

📊 **From reports:** SaaS metrics tools auto-calculate this. Baremetrics: SaaS Metrics → LTV ÷ CAC. ChartMogul: Metrics → LTV. ProfitWell: Unit Economics. Or calculate manually from Finance data.

🧮 **Calculation:** *LTV = (Avg Revenue Per Account × Gross Margin %) ÷ Monthly Churn Rate. Ratio = LTV ÷ CAC.*

F09	Gross Margin	%

Question: Revenue minus cost of goods sold, as a percentage?

⚡ **From memory:** Your CFO knows this number. SaaS companies are typically 70–85%. Services-heavy businesses are 40–60%.

📊 **From reports:** P&L / Income Statement. NetSuite: Reports → Income Statement → Gross Profit line. QuickBooks: Reports → Profit & Loss → Gross Profit row. Xero: Reports → Profit and Loss. Board deck financial summary.

🧮 **Calculation:** *(Revenue - COGS) ÷ Revenue × 100.*

Professional Services (skip if N/A)

📋 **Report:** PS Utilization / Project Status | **Systems:** Kantata, Certinia, Harvest, Toggl, Asana/Jira

P01	Average Project Margin	%

Question: Average profit margin across PS engagements?

⚡ **From memory:** If you don't have a PS team, skip this entire section. If you do: what's the typical profit margin on projects?

📊 **From reports:** PSA → Project Profitability report. Kantata: Reports → Project Financials → margin by project. Certinia: PS Cloud → Project Margin. Or: Finance PS revenue line minus PS delivery costs.

🧮 **Calculation:** *(Project Revenue - Project Costs) ÷ Project Revenue × 100, averaged across projects.*

P05	Billable Utilization	%

Question: Percentage of available hours that are billable?

⚡ **From memory:** Of your consultants' working hours, what percentage is billable client work? 70–80% is target.

📊 **From reports:** PSA or time tracking → Utilization Report. Kantata: Reports → Utilization. Certinia: Resource Management → Utilization. Harvest: Reports → Time → Billable vs Non-billable. Toggl: Reports → Billable %.

🧮 **Calculation:** *Billable hours logged ÷ Total available hours × 100.*

P08	On-Time Completion Rate	%

Question: Percentage of projects delivered on or before deadline?

⚡ **From memory:** How often do projects finish when they're supposed to? Be honest — most companies overestimate this.

📊 **From reports:** PSA or PM tool → Delivery Report. Kantata: Reports → Project Status → on-time vs late. Asana: Portfolios → filter by due date vs completion. Jira: Projects → actual vs planned end date.

🧮 **Calculation:** *Projects completed on/before deadline ÷ Total completed projects × 100.*

Data, Tech & Reporting

📋 **Report:** System Usage / Tech Stack Audit | **Systems:** CRM Admin, Integration Platforms (Workato, Zapier), BI Tools (Tableau, Looker, Power BI)

D01	Data Accuracy Rate	%

Question: What percentage of your CRM/system data is accurate and current?

⚡ **From memory:** If you pulled 100 contact records right now, how many would have correct info? Be honest about data hygiene.

📊 **From reports:** CRM → Data Quality tools. Salesforce: Data.com → Assessment. HubSpot: Settings → Data Quality scores. Or manual audit: sample 100 records, verify key fields (name, email, company, title), count accurate ÷ total.

🧮 **Calculation:** *Verified accurate records ÷ Total sampled records × 100.*

D08	Tech Stack Utilization	%

Question: What percentage of licensed tech features are actively used?

⚡ **From memory:** Think about your CRM, MAP, and other tools. You're probably paying for features nobody touches. 40–60% is common.

📊 **From reports:** Per tool: admin console usage data. Salesforce: Setup → Company Info → Licenses. HubSpot: Settings → Usage & Limits. Or use SaaS management tools: Zylo, Productiv. Or manually audit: list features per tool, mark active, count ratio.

🧮 **Calculation:** *Features actively used monthly ÷ Total available features × 100, averaged across tech stack.*

D11	Report Usage Rate	%

Question: What percentage of built reports/dashboards are viewed regularly?

⚡ **From memory:** Of all the dashboards someone built, how many get looked at weekly? Most companies: under 40%.

📊 **From reports:** BI tool → Usage Analytics. Tableau: Admin → Views → usage stats. Looker: Admin → System Activity → dashboard usage. Power BI: Admin → Usage Metrics. Salesforce: Report run history.

🧮 **Calculation:** *Reports/dashboards viewed ≥1x per week ÷ Total built reports × 100.*

Planning & Strategy

📋 **Report:** Territory / Quota / Planning Report | **Systems:** Xactly, Anaplan, CRM quota reports, Finance/FP&A, HR

G01	Territory Balance Score	%

Question: How evenly distributed is opportunity across territories? (100% = perfect)

⚡ **From memory:** Are some territories loaded while others are starving? 100% = balanced. Most are 50–70%.

📊 **From reports:** CRM → Pipeline by Territory report. Salesforce: Reports → Opportunities → Group by Territory → compare pipeline. Xactly: Territory Management → Balance analysis. Or export territory pipeline data to spreadsheet.

🧮 **Calculation:** *Assess distribution evenness. Formal: 1 - (Std Dev of territory pipeline ÷ Mean territory pipeline).*

G06	Quota Attainability Rate	%

Question: What percentage of reps hit at least 80% of quota?

⚡ **From memory:** Of your quota-carrying reps, how many get to at least 80%? If less than half, your quotas might be the problem.

📊 **From reports:** CRM or comp tool → Quota Attainment report. Salesforce: Forecasting → Quota Attainment view. Xactly: Analytics → Attainment Distribution. CaptivateIQ: Dashboards → Attainment.

🧮 **Calculation:** *Reps at ≥80% quota attainment ÷ Total quota-carrying reps × 100.*

G21	Cross-functional Alignment	1–5

Question: How aligned are sales, marketing, CS, and finance on goals? (1=siloed, 5=aligned)

⚡ **From memory:** 1 = siloed teams, different metrics, blame culture. 3 = some shared goals. 5 = unified OKRs, regular cross-team cadence.

📊 **From reports:** This is inherently a judgment call, but you can ground it: Do teams share KPIs? (Check dashboards.) Is there a regular cross-functional meeting? Are OKRs documented and shared? Survey 3–4 leaders across functions and average.

🧮 **Calculation:** *Self-assessment or survey average across leadership (1–5 scale).*

🧠 Coordination Intelligence

📋 **Report:** Cross-functional — requires data from multiple teams | **Systems:** CRM + MAP + CS Platform + Finance

R01	Lead-to-Revenue Cycle Time	days

Question: Total days from first marketing touch to closed revenue?

⚡ **From memory:** The full journey: first ad click or event to signed contract. Usually 2–4x longer than your sales cycle alone.

📊 **From reports:** Requires joining MAP + CRM data. HubSpot: Reports → Attribution → Contact Create Date to Deal Close Date. Marketo + Salesforce: Revenue Cycle Analytics → lead-to-revenue timeline. Bizible: Lead Velocity dashboard.

🧮 **Calculation:** *Average(Closed-Won Date - First Marketing Touch Date). Requires joining MAP first-touch timestamp with CRM close date.*

R05	Unified Forecast Accuracy	%

Question: How accurate is the combined sales+marketing+CS revenue forecast?

⚡ **From memory:** When you add up all revenue streams (new, expansion, renewal), how close is the total forecast to reality?

📊 **From reports:** Combine forecasts from: CRM sales pipeline (commit), CS renewal projections, expansion/upsell pipeline. Compare total to actual revenue. Clari: Unified view → accuracy. Or manually: sum all stream forecasts vs Finance actuals.

🧮 **Calculation:** *(1 - |Combined Forecast - Actual Total Revenue| ÷ Actual Total Revenue) × 100.*

R10	RevOps Maturity Score	1–5

Question: How mature is your RevOps function?

⚡ **From memory:** 1 = no RevOps, everyone does their own thing. 3 = dedicated ops people but siloed by function. 5 = unified strategic RevOps team.

📊 **From reports:** Score yourself against this rubric: 1 = No ops function, ad hoc support. 2 = Shared admin across sales/marketing, reactive. 3 = Dedicated ops per function but siloed teams. 4 = Unified RevOps team, shared processes and data. 5 = Strategic RevOps with executive seat, proactive optimization, cross-functional automation.

🧮 **Calculation:** *Self-assessment against maturity rubric (1–5).*

What Happens After You Submit

Instant results: Your assessment is processed by the RevOps Octopus engine with AI-powered analysis. Results appear within 30 seconds.

Personal review: Ifeanyi Chukwudebe personally reviews every Pulse Check and follows up via email with additional insights.

Your report includes: Overall health score, 8 arm scores with visual breakdown, coordination intelligence score, AI executive summary, top 3 priorities with revenue impact estimates, 90-day action plan, and downloadable PDF.

Score Interpretation

Score	Status	What It Means
80–100	Healthy	Operations running well. Optimize and maintain.
60–79	Needs Attention	Functional but with gaps. Targeted improvements will have meaningful revenue impact.
40–59	At Risk	Significant issues. Multiple arms underperforming. Likely losing revenue to operational friction.
0–39	Critical	Systemic failure. Revenue operations need urgent, structured intervention.

Next Steps

Book a free 15-minute debrief: Walk through results with Ifeanyi.

Deep Dive ($99): 70 metrics with category-level breakdowns, peer benchmarks, and 30/60/90 day action plan. Includes a Report Gathering Guide showing exactly which 8 reports to pull.

Full Methodology ($1,500): All 207 metrics facilitated by Ifeanyi across two sessions with complete coordination analysis and 12-month roadmap.

Ready? Take the Pulse Check at therevopsguide.com/assessment