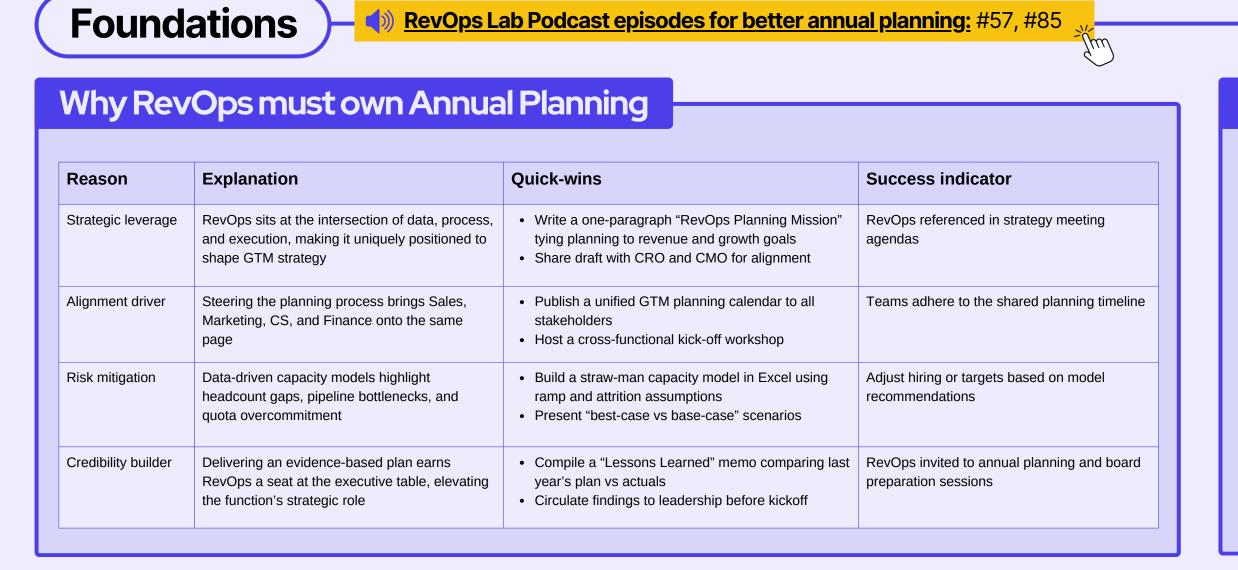
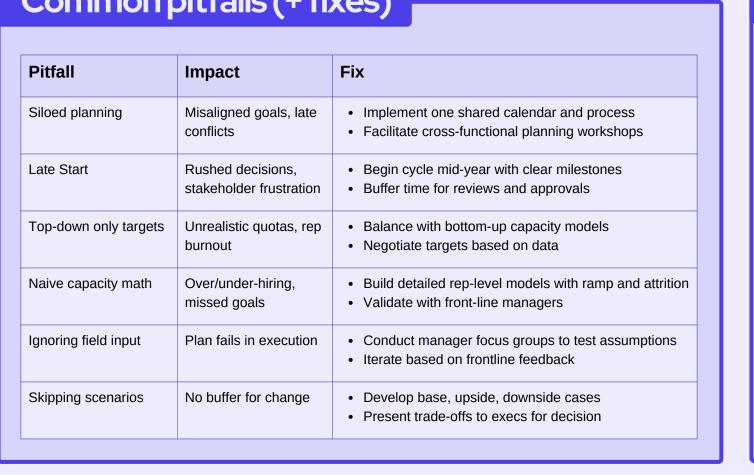
Annual GTM Planning & Capacity Modeling Cheat Sheet

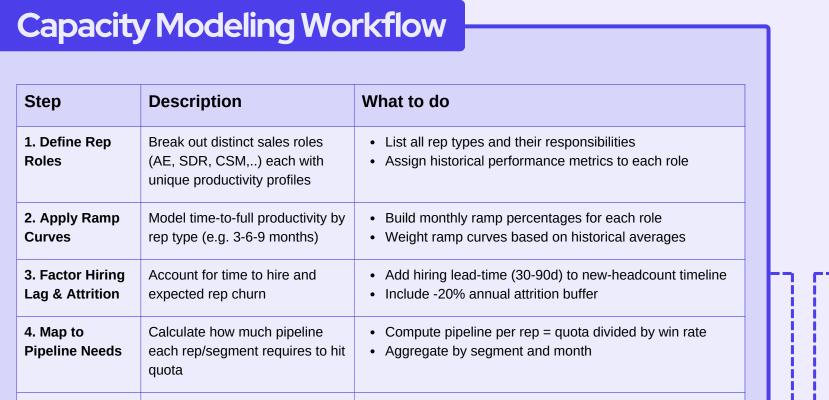


August September		Modeling & execution prep October November		December January		January		
Objective	Set foundational inputs, timelines and milestones • Circulate unified GTM planning calendar to Sales, Marketing, CS, Finance • Host kick-off workshop to agree assumptions and deadlines • Run rapid plan vs actual post-mortem and surface 3 lessons learned		Objective	Build + vet base/ upside / downside scenarios. Finalize headcount, quotas and enablement plans. • Develop capacity and pipeline models for each scenario • Convene review sessions with CRO, CEO, FP&A, MarOps • Lock in hiring + quota allocations • Create enablement resources • Schedule launch events + workshops		Objective Finalize plan, enable the field, and lock systems for go-live		
Key activities			Key activities			activities dashb • Syste valida • Run S plan, •	OKRs - publish targets to loards on go-check: dashboard tion, automation tests of the exec messages, Q&A (90 checkpoints - adoption, ne, hiring reviews)	

Role	Responsibility	Deliverable	Latest involvement timing
RevOps Leader	Orchestrate planning cadence, maintain unified calendar	Master planning timeline & process guide	Pre-Planning (Aug-Sept)
CRO	Set revenue targets, approve scenarios	Final revenue targets & scenario sign-off	Pre-Planning (Aug-Sept)
СМО	Define marketing pipeline goals, agree campaign support	Pipeline requirements & budget requests	Pre-Planning (Aug-Sept)
Head of CS	Provide renewal/expansion forecasts, retention assumptions	Renewal targets & retention metrics	Pre-Planning (Aug-Sept)
Finance (FP&A)	Supply budget constraints, top-down targets, financial model	Budget ceilings & financial model files	Pre-Planning (Aug-Sept)
HR & TA	Manage hiring timelines, support capacity planning	Recruitment schedule & candidate pipeline	Modeling & execution prep (Oct-Nov)
Sales Managers	Validate territory assignments, quota feasibility	Territory maps & quota proposals	Modeling & execution prep (Oct-Nov)
Marketing Ops	Supply lead gen data, support scenario modeling	Pipeline forecast data sets	Modeling & execution prep (Oct-Nov)
Sales Enablement	Develop training materials, support kickoff enablement	Onboarding deck, FAQs, playbooks	Modeling & execution prep (Oct-Nov)

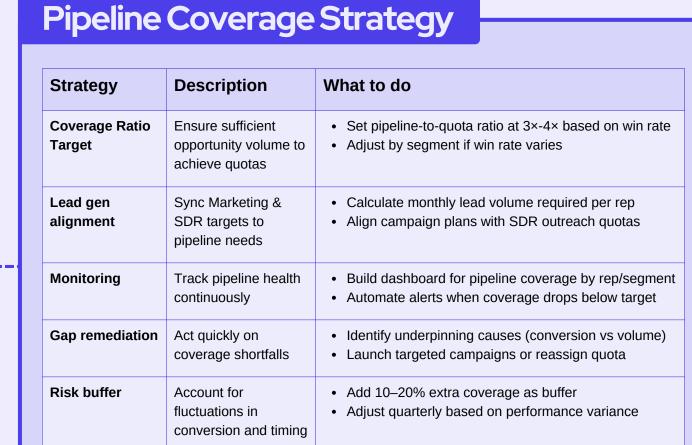
Capacity & Pipeline Modeling Common pitfalls (+ fixes)



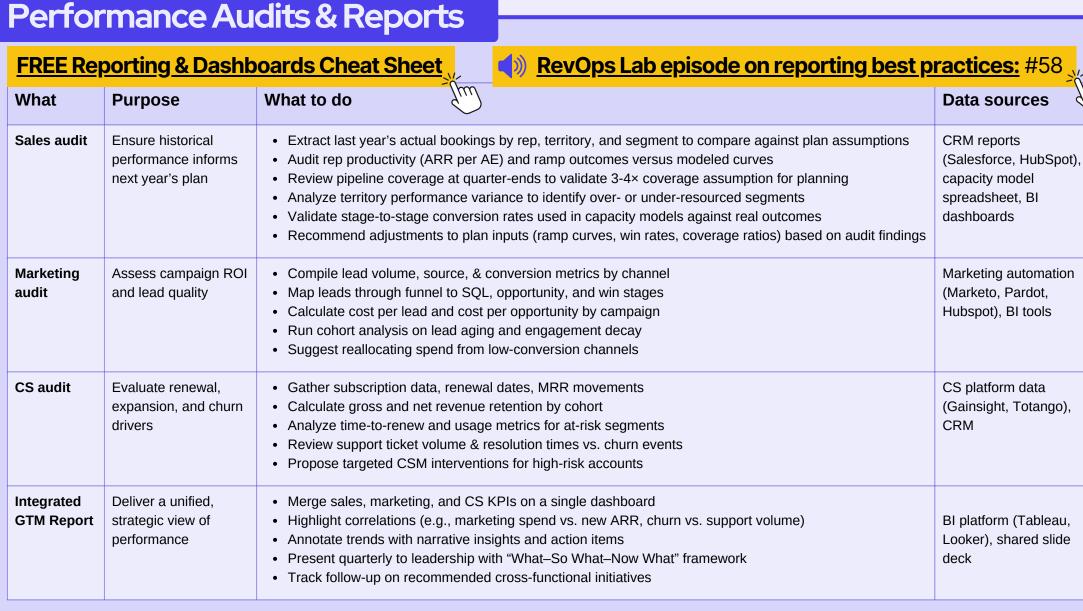


Sum required capacity by quarter

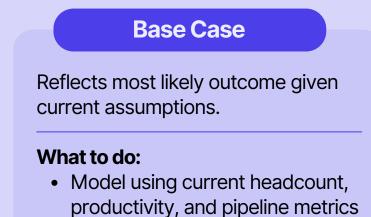
Compare against existing headcount and hiring plan



FREE Strategic RevOps Cheat Sheet



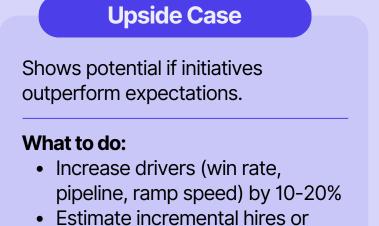
Scenario Planning & Trade-Offs



Validate assumptions with

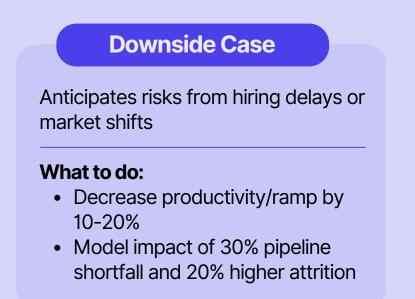
Trade-off analysis

stakeholders



Guides investment vs. pull-back decisions. Compare revenue delta vs. cost across scenarios.

budget required



Reverse-engineer desired

needed by time period

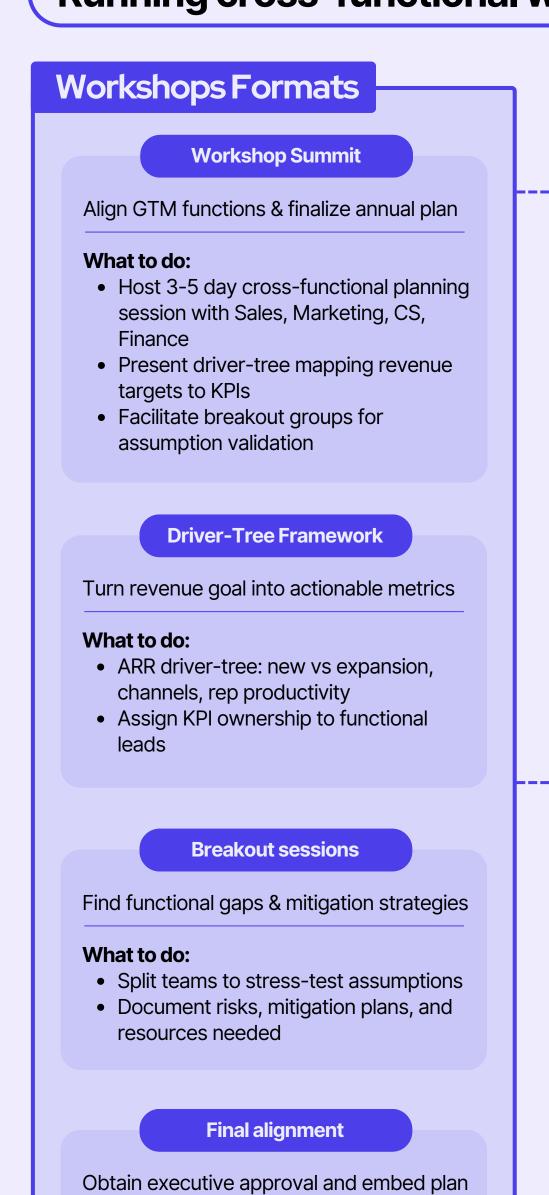
coverage into number of reps

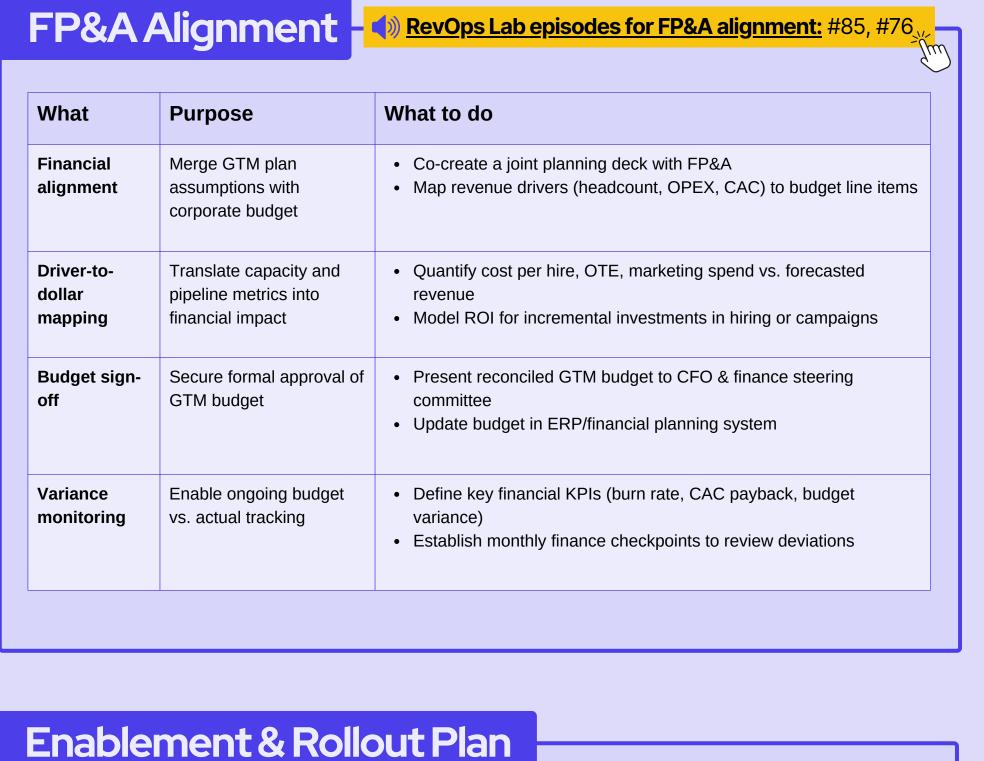
What	Purpose	What to do
Top-Down Target	Executive goal for ARR, bookings, new business	 Gather CEO/CFO revenue targets Document assumptions and rationale
Bottom-Up Validation	Ensure targets are operationally feasible	 Run capacity model vs target Identify staffing or pipeline gaps
Gap Analysis	Highlight shortfalls between capacity and targets	 Calculate % gap by segment and quarter Prioritize areas for investment or adjustmen
Target Reconciliation	Align executive ambition with operational plan	 Facilitate review session with CRO, CMO, FP&A Negotiate realistic targets
Final Target Sign-Off	Lock in numbers for GTM teams	 Publish approved targets to field with context document Update compensation quota worksheets

Setting Revenue Targets

Metrics & Benchmarks FREE B2B SaaS Metrics Cheat Sheet					
Metric	Benchmark	What to do			
Annual ARR per (fully ramped) AE	\$500k - \$1M ARR	Calculate last 12 months' annual bookings per AE once past ramp and compare against target			
Win Rate	20% - 30%	Compute average win rate by segment + product line and identify segments below 20 % remediation			
Ramp Time (to full productivity)	3-6 months (SMB/MM), 9–12 months (ENT)	Model ramp curves per rep profile			
Pipeline Coverage Ratio	3×-4× quota	Determine required pipeline (= quota divided by win rate) + monitor pipeline per rep weel			
	· · ·	Determine required pipeline (= quota divided by win rate) + monitor pipeline per r Calibrate quotas so 70-80 % of reps can realistically hit			

Running cross-functional workshops





corporate budget	iviap revenue univers (neaucount, or EX, CAC) to budget line items
Translate capacity and pipeline metrics into financial impact	 Quantify cost per hire, OTE, marketing spend vs. forecasted revenue Model ROI for incremental investments in hiring or campaigns
Secure formal approval of GTM budget	 Present reconciled GTM budget to CFO & finance steering committee Update budget in ERP/financial planning system
Enable ongoing budget vs. actual tracking	 Define key financial KPIs (burn rate, CAC payback, budget variance) Establish monthly finance checkpoints to review deviations
ment & Roll	out Plan
ment & Roll	out Plan What to do
Purpose Equip teams with knowledge of plan	What to do • Develop quick-reference decks on quotas, territories, and incentives

Component	Purpose	What to do
Quota design	Ensure targets are achievable and aligned with capacity	 Calibrate quotas at 80-90% of modeled capacity Validate distribution so 70-80% of reps can attain
ncentive structure	Drive desired behaviors (new business, upsell, renewals)	Define payout curves for each motionAlign SPIFFs to strategic initiatives
Accelerators & hresholds	Reward overperformance and protect baseline motivation	 Set accelerator kick-in at 110% attainment Require minimum 80% attainment before accelerators
Budget alignment	Match compensation budgets to headcount plan	 Model total compensation cost under each scenario Review with FP&A for budget feasibility

Component	Purpose	What to do	Data sources
Account segmentation	Group accounts by potential and fit	 Classify accounts by ARR, ICP fit, and vertical Tag accounts with key attributes (industry, size, region) 	CRM export, firmographic data, ICP document
Territory mapping	Balance workload and opportunity across reps	 Plot accounts geographically or by segment Use equal-distribution algorithm or weighted by ARR potential 	Mapping tool, spreadsheet
Coverage modeling	Validate rep capacity and travel constraints	 Calculate number of accounts per rep against capacity model Adjust boundaries to respect ramp time and call capacity 	Capacity model spreadsheet, rep ramp profiles
Performance review	Align territories with historical results	 Compare last year's territory attainment vs. potential Identify over- and under-performing territories for realignment 	Past performance reports, BI dashboards
Optimization cycle	Institutionalize ongoing territory refinement	 Schedule biannual territory reviews Collect rep feedback and update maps accordingly 	Shared territory maps, rep surveys

☐ Develop enablement materials: quick-ref

Deal Intelligence

decks, FAQs, manager one-pagers

☐ Plan and run field kickoff events with

feedback

Territory Design | NevOps Lab episode on territory design: #42

Templates & Tools

Templates & Tools				
Template/Tool	Purpose	What to do / How to use		
Capacity Model Spreadsheet	Build month-by-month rep capacity vs targets	 Use ramp, attrition, hiring lag inputs per row Include formulas to calculate pipeline needs & headcount gaps 		
Driver-tree deck	Visualize revenue breakdown by function and KPI	 Create slides showing ARR -> new vs expansion -> channels -> rep productivity Assign slides to functional leads for review 		
Scenario matrix	Compare base/upside/ downside financials and headcount	 Build 3-column matrix in sheet or slide Populate revenue, cost, and P&L impact per scenario 		
Planning calendar	Coordinate cross- functional milestones and deliverables	 Use shared online calendar (Google/Outlook) Block recurring syncs for key phases (see timeline above) 		
Executive summary template	Communicate plan highlights to C-suite	 One-pager with targets, scenarios, risks, and asks Use bullet points, charts, and clear next steps 		
Dashboard & Alert setup	Automate KPI tracking and threshold notifications	 Configure dashboards in BI tool (Tableau, Looker) Set alerts for pipeline < 3× coverage, quota attainment pacing 		

Component	Purpose	What to do	
Adoption metrics	Measure actual usage vs. licensed seats	 Pull login, feature-use, and license utilization reports Calculate adoption rate per tool and team 	
Feedback collection	Surface user pain points and enhancement requests	 Run quarterly user surveys and focus groups Document top 3 issues per tool for action 	
Enablement & Training	Boost proficiency and feature usage	 Develop role-based micro-training sessions Track completion and post-training adoption lift 	

Component	Purpose	What to do
Inventory & Assessment (see above)	Understand current tools, overlaps, and gaps	 List all RevOps, Sales, Marketing, CS systems Document primary use case and owner for each
Rationalization plan	Reduce redundancy and optimize cost	 Score each tool on usage, ROI, integration ease Recommend decommission candidates & consolidation p
Roadmap & Prioritization	Sequence platform upgrades and new tool rollouts	 Map desired capabilities vs current state Create phased roadmap with timelines and budget
Governance model	Maintain stack health	 Establish quarterly tool review committee Define process for tool requests, evaluations, and sunset

Annual Planning Checklist

Reconvene full group to present refined

Assign action items with owners and

Foundations

What to do:

deadlines

☐ Draft a "RevOps Planning Mission" statement linking planning to revenue and growth goals; share with CRO/CMO

- ☐ Publish a unified GTM planning calendar for Sales, Marketing, CS, and Finance \Box Host an all-hands kick-off workshop to
- agree on inputs, assumptions, and milestone dates
- ☐ Compile last year's "Lessons Learned" memo comparing plan vs. actuals; circulate to leadership

Capacity & Pipeline Modeling

What

Training

materials

Field kickoff

events

Manager toolkits

Feedback

Collect real-time adoption

insights and course-

- ☐ Calculate fully-ramped ARR per AE over the past 12 months; compare to \$500k-\$1M benchmark
- ☐ Define ramp curves by role (3-6 mo SMB/Mid, 9-12 mo Enterprise); seed new hires with pipeline
- ☐ Factor 30-90 day hiring lag and ~20 % annual attrition into your headcount model
- ☐ Set pipeline coverage targets at 3×-4× quota; model required pipeline per rep

Launch short pulse surveys after kickoff

• Establish dedicated Slack channel or office hours for questions

- \Box Build capacity models in five steps (define roles -> apply ramp -> add churn/hiring lag -> map pipeline -> derive headcount)
- ☐ Develop base/upside/downside scenario models; stress-test with +/-10-20 % on key drivers
- ☐ Perform trade-off analysis: revenue delta vs. cost delta; prepare "What-So What-Now What" summary

Cross-Functional Workshops & Partnerships

- \Box Schedule a 3-5 day cross-functional planning summit; use driver-tree to decompose targets
- ☐ Conduct small-group breakouts to validate assumptions and document risks/mitigations
- ☐ Co-author GTM budget with FP&A; map capacity and pipeline drivers to financial line items
- ☐ Secure finance sign-off on reconciled GTM budget; update ERP + planning system

Templates & Tools

- ☐ Deploy a capacity-model spreadsheet template with ramp, churn, and hiringlag rows
- ☐ Create a driver-tree deck mapping ARR executive sponsorship; capture real-time -> new vs. expansion -> channels -> rep productivity ☐ Establish feedback loops (surveys, Slack
- ☐ Use scenario matrix slides to compare office hours) to iterate on rollout base, upside, downside revenue vs.
 - ☐ Combine GTM metrics into an integrated quarterly executive report highlighting cross-functional insights
- $^\square$ Maintain a planning calendar in a
- shared online tool; block all key syncs and workshops Leverage external benchmarks
- (ARR/AE, win rate, ramp time, pipeline coverage, attrition) to validate assumptions
- rationalization
- \Box Inventory GTM tech stack; score tools on usage, ROI, integration, and plan
- ☐ Draft a 12-month RevOps roadmap linking initiatives to strategic KPIs and publish to stakeholders \Box Pull adoption metrics for each GTM

tool; identify gaps and plan targeted

 \Box Run sales, marketing, and CS

enablement

performance audits; surface data quality, conversion, and retention issues

Revenue Al Platform - "It's like Gong, but 50% the price"











