Annual GTM Planning & Capacity Modeling Cheat Sheet

Foundations

RevOps Lab Podcast episodes for better annual planning: #57, #85

Why RevOps must own Annual Planning

Reason	Explanation	Quick-wins	Success indicator
Strategic leverage	RevOps sits at the intersection of data, process, and execution, making it uniquely positioned to shape GTM strategy	• Write a one-paragraph "RevOps Planning Mission" tying planning to revenue and growth goals • Share draft with CRO and CMO for alignment	RevOps referenced in strategy meeting agendas
Alignment driver	Steering the planning process brings Sales, Marketing, CS, and Finance onto the same page	• Publish a unified GTM planning calendar to all stakeholders • Host a cross-functional kick-off workshop	Teams adhere to the shared planning timeline
Risk mitigation	Data-driven capacity models highlight headcount gaps, pipeline bottlenecks, and quota overcommitment	• Build a straw-man capacity model in Excel using ramp and attrition assumptions • Present "best-case vs base-case" scenarios	Adjust hiring or targets based on model recommendations
Credibility builder	Delivering an evidence-based plan earns RevOps a seat at the executive table, elevating the function's strategic role	• Compile a "Lessons Learned" memo comparing last year's plan vs actuals • Circulate findings to leadership before kickoff	RevOps invited to annual planning and board preparation sessions

Planning Timeline

Pre-planning: August, September — Modeling & execution prep: October, November — Go-live & Execution: December, January

Pre-planning (August–September)	
Objective	Set foundational inputs, timelines and milestones
Key activities	• 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

Modeling & execution prep (October–November)	
Objective	Build + vet base/ upside / downside scenarios. Finalize headcount, quotas and enablement plans.
Key activities	• 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

Go-live & Execution (December–January)	
Objective	Finalize plan, enable the field, and lock systems for go-live
Key activities	• Lock OKRs - publish targets to dashboards • System go-check: dashboard validation, automation tests • Run SKO & All-hands - share the plan, exec messages, Q&A • 30/60/90 checkpoints - adoption, pipeline, hiring reviews

✅ Quick-wins
- **QW1:** Confirm all stakeholder roles and deadlines in the planning calendar
- **QW2:** Schedule recurring syncs for modeling review and approvals
- **QW3:** Prepare a kickoff workshop agenda with clear objectives and outcomes

Stakeholder Roles & Accountability

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)
CMO	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)

Pitfall	Impact	Fix
Siloed planning	Misaligned goals, late conflicts	• Implement one shared calendar and process • Facilitate cross-functional planning workshops
Late Start	Rushed decisions, stakeholder frustration	• Begin cycle mid-year with clear milestones • Buffer time for reviews and approvals
Top-down only targets	Unrealistic quotas, rep burnout	• Balance with bottom-up capacity models • Negotiate targets based on data
Naive capacity math	Over/under-hiring, missed goals	• Build detailed rep-level models with ramp and attrition • Validate with front-line managers
Ignoring field input	Plan fails in execution	• Conduct manager focus groups to test assumptions • Iterate based on frontline feedback
Skipping scenarios	No buffer for change	• Develop base, upside, downside cases • Present trade-offs to execs for decision

Capacity Modeling Workflow

Step	Description	What to do
1. Define Rep Roles	Break out distinct sales roles (AE, SDR, CSM,..) each with unique productivity profiles	• List all rep types and their responsibilities • Assign historical performance metrics to each role
2. Apply Ramp Curves	Model time-to-full productivity by rep type (e.g. 3-6-9 months)	• Build monthly ramp percentages for each role • Weight ramp curves based on historical averages
3. Factor Hiring Lag & Attrition	Account for time to hire and expected rep churn	• Add hiring lead-time (30-90d) to new-headcount timeline • Include -20% annual attrition buffer
4. Map to Pipeline Needs	Calculate how much pipeline each rep/segment requires to hit quota	• Compute pipeline per rep = quota divided by win rate • Aggregate by segment and month
5. Derive Headcount Plan	Reverse-engineer desired coverage into number of reps needed by time period	• Sum required capacity by quarter • Compare against existing headcount and hiring plan

Pipeline Coverage Strategy

Strategy	Description	What to do
Coverage Ratio Target	Ensure sufficient opportunity volume to achieve quotas	• Set pipeline-to-quota ratio at 3×-4× based on win rate • Adjust by segment if win rate varies
Lead gen alignment	Sync Marketing & SDR targets to pipeline needs	• Calculate monthly lead volume required per rep • Align campaign plans with SDR outreach quotas
Monitoring	Track pipeline health continuously	• Build dashboard for pipeline coverage by rep/segment • Automate alerts when coverage drops below target
Gap remediation	Act quickly on coverage shortfalls	• Identify underpinning causes (conversion vs volume) • Launch targeted campaigns or reassign quota
Risk buffer	Account for fluctuations in conversion and timing	• Add 10–20% extra coverage as buffer • Adjust quarterly based on performance variance

FREE Strategic RevOps Cheat Sheet

Performance Audits & Reports

FREE Reporting & Dashboards Cheat Sheet

RevOps Lab episode on reporting best practices: #58

What	Purpose	What to do	Data sources
Sales audit	Ensure historical performance informs next year's plan	• Extract last year's actual bookings by rep, territory, and segment to compare against plan assumptions • Audit rep productivity (ARR per AE) and ramp outcomes versus modeled curves • Review pipeline coverage at quarter-ends to validate 3-4× coverage assumption for planning • Analyze territory performance variance to identify over- or under-resourced segments • Validate stage-to-stage conversion rates used in capacity models against real outcomes • Recommend adjustments to plan inputs (ramp curves, win rates, coverage ratios) based on audit findings	CRM reports (Salesforce, HubSpot), capacity model spreadsheet, BI dashboards
Marketing audit	Assess campaign ROI and lead quality	• Compile lead volume, source, & conversion metrics by channel • Map leads through funnel to SQL, opportunity, and win stages • Calculate cost per lead and cost per opportunity by campaign • Run cohort analysis on lead aging and engagement decay • Suggest reallocating spend from low-conversion channels	Marketing automation (Marketo, Pardot, Hubspot), BI tools
CS audit	Evaluate renewal, expansion, and churn drivers	• Gather subscription data, renewal dates, MRR movements • Calculate gross and net revenue retention by cohort • Analyze time-to-renew and usage metrics for at-risk segments • Review support ticket volume & resolution times vs. churn events • Propose targeted CSM interventions for high-risk accounts	CS platform data (Gainsight, Totango), CRM
Integrated GTM Report	Deliver a unified, strategic view of performance	• Merge sales, marketing, and CS KPIs on a single dashboard • Highlight correlations (e.g., marketing spend vs. new ARR, churn vs. support volume) • Annotate trends with narrative insights and action items • Present quarterly to leadership with "What–So What–Now What" framework • Track follow-up on recommended cross-functional initiatives	BI platform (Tableau, Looker), shared slide deck

Scenario Planning & Trade-Offs

Base Case

Reflects most likely outcome given current assumptions.

What to do:
- Model using current headcount, productivity, and pipeline metrics
- Validate assumptions with stakeholders

Upside Case

Shows potential if initiatives outperform expectations.

What to do:
- Increase drivers (win rate, pipeline, ramp speed) by 10-20%
- Estimate incremental hires or budget required

Downside Case

Anticipates risks from hiring delays or market shifts

What to do:
- Decrease productivity/ramp by 10-20%
- Model impact of 30% pipeline shortfall and 20% higher attrition

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

Setting Revenue Targets

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

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 internal target
Win Rate	20% - 30%	Compute average win rate by segment + product line and identify segments below 20 % for 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 weekly
Attainment rate	70% - 80% of reps hitting quota	Calibrate quotas so 70-80 % of reps can realistically hit

Running cross-functional workshops

Workshops Formats

Workshop Summit

Align GTM functions & finalize annual plan

What to do:
- Host 3-5 day cross-functional planning session with Sales, Marketing, CS, Finance
- Present driver-tree mapping revenue targets to KPIs
- Facilitate breakout groups for assumption validation

Driver-Tree Framework

Turn revenue goal into actionable metrics

What to do:
- ARR driver-tree: new vs expansion, channels, rep productivity
- Assign KPI ownership to functional leads

Breakout sessions

Find functional gaps & mitigation strategies

What to do:
- Split teams to stress-test assumptions
- Document risks, mitigation plans, and resources needed

Final alignment

Obtain executive approval and embed plan

What to do:
- Reconvene full group to present refined scenarios
- Assign action items with owners and deadlines

FP&A Alignment

RevOps Lab episodes for FP&A alignment: #85, #76

What	Purpose	What to do
Financial alignment	Merge GTM plan assumptions with corporate budget	• Co-create a joint planning deck with FP&A • Map revenue drivers (headcount, OPEX, CAC) to budget line items
Driver-to-dollar mapping	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
Budget sign-off	Secure formal approval of GTM budget	• Present reconciled GTM budget to CFO & finance steering committee • Update budget in ERP/financial planning system
Variance monitoring	Enable ongoing budget vs. actual tracking	• Define key financial KPIs (burn rate, CAC payback, budget variance) • Establish monthly finance checkpoints to review deviations

Enablement & Rollout Plan

What	Purpose	What to do
Training materials	Equip teams with knowledge of plan changes	• Develop quick-reference decks on quotas, territories, and incentives • Create FAQs addressing "what's new" and "why it matters"
Field kickoff events	Signal start of new plan and energize teams	• Host virtual/in-person kickoff with executive sponsorship • Include breakout Q&A and on-the-spot feedback channels
Manager toolkits	Enable frontline leaders to coach execution	• Provide one-pagers for managers on plan goals and talking points • Schedule manager-only deep-dive sessions
Feedback loops	Collect real-time adoption insights and course-correct	• Launch short pulse surveys after kickoff • Establish dedicated Slack channel or office hours for questions

Comp Alignment

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
Incentive structure	Drive desired behaviors (new business, upsell, renewals)	• Define payout curves for each motion • Align SPIFFs to strategic initiatives
Accelerators & thresholds	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

Territory Design

RevOps Lab episode on territory design: #42

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

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

Tool Inventory & Adoption

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

Tech Stack Roadmap

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 paths
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 over time	• Establish quarterly tool review committee • Define process for tool requests, evaluations, and sunset

Annual Planning Checklist

Foundations

- ☐ 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
- ☐ 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

- ☐ Calculate fully-ramped ARR per AE over the past 12 months; compare to the $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
- ☐ 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

- ☐ Schedule a 3-5 day 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
- ☐ Develop enablement materials: quick-ref decks, FAQs, manager one-pagers
- ☐ Plan and run field kickoff events with executive sponsorship; capture real-time feedback
- ☐ Establish feedback loops (surveys, Slack office hours) to iterate on rollout

Templates & Tools

- ☐ Deploy a capacity-model spreadsheet template with ramp, churn, and hiring-lag rows
- ☐ Create a driver-tree deck mapping ARR -> new vs. expansion -> channels -> rep productivity
- ☐ Use scenario matrix slides to compare base, upside, downside revenue vs. cost
- ☐ Combine GTM metrics into an integrated quarterly executive report highlighting cross-functional insights
- ☐ 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
- ☐ Inventory GTM tech stack; score tools on usage, ROI, integration, and plan rationalization
- ☐ Draft a 12-month RevOps roadmap linking initiatives to strategic KPIs and publish to stakeholders
- ☐ Pull adoption metrics for each GTM tool; identify gaps and plan targeted enablement
- ☐ Run sales, marketing, and CS performance audits; surface data quality, conversion, and retention issues