

Chief Operating Officer (COO) Cheat Sheet - B2B Edition

COO 101 & Foundations

The COO's Goals & Outcomes

[FREE From RevOps to COO Cheat Sheet](#)

#	Outcome	Definition	What "Good" looks like	Guardrail metrics
1	Durable Growth	New + expansion revenue that sticks	NRR ≥ 110% (model-dependent); low logo churn	NRR, GRR, Win Rate, Upsell %, Churn rate
2	Efficiency	Growth at improving cost	CAC Payback down; Sales Productivity up	CAC Payback (months), Pipe Gen per SDR/AE, GM%
3	Predictability	Plan -> forecast -> deliver	3+ quarters within +/- 5-7% of plan	Forecast Accuracy %, Pipeline Coverage, Cycle Time
4	Customer Experience	Frictionless land-adopt-expand-renew	Time-to-Value down; Expansion from usage signals	Time to First Value, Adoption %, Expansion Rate
5	Risk & Compliance	Resilient operations and controls	No material incidents; quick recovery	Incident MTRR, Audit issues, Vendor dependency count

COO Archetypes

Archetype	Core reports-in	Best when...	Risks	Mitigations
GTM Ops-Led COO	RevOps, CS Ops, PMO, Biz Systems	Sales-led growth, multi-segment GTM	Overlap with CRO	Clear decision rights; pricing/forecast councils
Delivery/Customer Ops COO	PS/Implement-, Support Ops, CS Ops	Complex onboarding/enterprise deployments	Underserving pipeline gen	Dedicated RevOps leader; tight CRO handshake
Platform/Corporate Ops COO	PMO, BizOps/Analytics, IT/Workplace, Vendor Mgmt, Risk Program	Late-stage scale & compliance	Slow decision-making	Lightweight councils; WIP limits
Product-Integrated COO	Portfolio/Program, Launch Readiness, Ops Enablement	Heavy eng/roadmap dependencies	Owning "what" vs. "when"	CPO owns content; COO owns sequencing/gates

Process, Planning & Decision-making

Value Streams

Stream	Goal	Primary KPIs	Levers & First fixes
Lead -> Cash	Predictable revenue	Coverage, CVR, cycle time, win rate	Stage exits; SLA dashboards
Build -> Ship	On-time launches	On-time %, defects post-launch, WIP	Launch gates, WIP limits
Hire -> Ramp	Productive headcount	Time-to-fill, ramp on-time, productivity	Role scorecards; enablement
Case -> Resolution	Great CX at low cost	MTRR, CSAT, reopen rate	Triage rules; self-serve

Operations Planning

[FREE Annual Planning Cheat Sheet](#)

Integrated Plan (Top-down + Bottom-up)

Input	Owner	Example	Output
Targets	CEO/CFO	Growth + margin	Annual plan
Capacity	COO/CRO/CHRO	AE/SDR/CSM models	Hiring plan
Unit Economics	CFO	CAC payback, GM%	Guardrails
Roadmap	CPO/CTO	Sequencing & constraints	Launch plan

Scenario Planning

Scenario	Trigger	Immediate Actions	Re-entry Criteria
Bull	Coverage >4x, NRR up	Pull hires forward	2+ Qtrs outperformance
Base	On-track KPIs	Maintain plan	-
Bear	Coverage <2.5x, NRR down	Freeze adds, shift mix	2 Qtrs stability

Systems & Data

[FREE Salesforce Data Hygiene Cheat Sheet](#)

Core Stack & Source of Truth			
Domain	System	Key Integrations	Notes
CRM	Salesforce/HubSpot	CPQ, Marketing, CS	Opportunity, account, pipeline
Revenue Intelligence	Weflow, Gong	CRM	Analytics, metrics, workflows
CPQ/Billing/RevRec	CPQ + Billing	CRM, Finance	Price, terms, revenue recognition
ERP	SAP S/4HANA, NetSuite	CRM, CPQ, billing, WMS	Finance, O2C, P2P, MRP
Product Analytics	Pendo/Amplitude/etc.	Data warehouse, CS	Adoption, expansion signals
Data Warehouse	Snowflake/BigQuery/etc.	All above	KPI layer; MDM/IDs
Data Governance			
What	Owner	Practice	Check
KPI Dictionary	COO/RevOps	One-pager, versioned	Quarterly audit
Data Quality	RevOps	Weekly health checks	Top issues resolved weekly
Master IDs	Data Eng	Account/contact IDs	Match rate ≥98%

COO Role & Scope

#	Area	Scope	Boundaries (Primary Owner)	Success Signals
1	Strategy -> Execution OS	Cadences, OKRs, KPI tree, decision logs	Strategy definition (CEO)	Plans delivered on time; cross-team blockers resolved fast
2	Planning & Forecast Orchestration	Annual plan, rolling reforecast, variance reviews	Accounting policy (CFO)	+/- 5-7% forecast accuracy; clear scenario triggers
3	Revenue Engine & RevOps	GTM architecture, stage definitions, deal desk guardrails	Quota ownership (CRO)	3-4x pipe coverage; win rate up; cycle time down
4	Product/Engineering Coordination	Capacity match to GTM, launch readiness gates	Technical roadmap content (CTO/CPO)	On-time launches with adoption targets met
5	Customer Lifecycle & CS Ops	Health scoring, expansion/renewal playbooks	Segment P&L (CRO/CS leader)	NRR up; time-to-value down; churn taxonomy in use
6	People & Org Ops	Org design for flow, ramp SLAs, manager operating bar	Compensation philosophy (CHRO/CFO)	Time-to-fill down; ramp on time; engagement stable
7	Finance Partnership	Opex/headcount guardrails, productivity assumptions	Capital structure, audit (CFO)	CAC payback down; opex % stable/down
8	Risk, Security & Compliance	Risk register, incident cadence, vendor continuity	Controls & audits (Legal/Sec)	No material incidents; MTRR down
9	Data & Systems Governance	KPI definitions, MDM IDs, CRM/CPQ hygiene	Data architecture (CTO/CIO)	Single source of truth; data trust up
10	PMO / Portfolio	Intake -> prioritize -> WIP limits -> retros	Tech delivery execution (CTO/CPO)	Fewer WIP items; faster cycle; fewer rollovers

Common Pitfalls (+ solutions)

#	Pitfall	Symptom	Quick fix (30-45d)	Long-term solution (1-3Qs)
1	Metric sprawl/no shared definitions	Conflicting ARR/NRR numbers	Publish a one-page KPI dictionary	Data governance (MDM/IDs), automated scorecards
2	Cadences without decisions	Meeting "status theater"	Add decision logs & owners to each cadence	Quarterly operating review with clear inputs/outputs
3	Pipeline quality issues	Missed commits, late-stage slippage	Tighten stage exit criteria, cleanup pipeline	Enablement + inspection rhythm; conversion playbooks
4	Over-customized stack	Manual work, low trust	Remove unused fields/workflows; standardize	RevOps-led roadmap; integration & automation plan
5	Hiring ahead of proof	CAC payback worsens	Freeze adds; redeploy to highest-yield plays	Capacity model tied to productivity gates & cohort data
6	Fuzzy handoffs	Long cycle times, rework	Map Lead -> Cash & Case -> Resolution; add SLAs	Cross-team SLAs with dashboards; WIP limits & retros
7	No scenario plan	Whiplash when market shifts	Define base/bull/bear with triggers	Rolling reforecast; cost/coverage levers pre-agreed

First 90 Days

Phase	Objectives	Actions	Deliverables	Anti-Patterns to avoid
Days 0-30 (Listen & Map)	Understand flow, KPIs, risks; identify quick wins	Listen tour, KPI baseline, value-stream maps	Current-state map, KPI dictionary, risk register	Launching big programs; changing org chart
Days 31-60 (Stabilize)	Fix obvious friction; set rhythm	Tighten cadences; simplify KPIs; fix 1-2 bottlenecks	Weekly exec + MOR templates; stage exits	Metric sprawl; meeting "status theater"
Days 61-90 (Systemize)	Lock OS v1; publish priorities	QBR format; 2-3 execution playbooks; capacity model	Operating Model v1; decision log live	Over-customizing tools; hiring ahead of proof

Decision Rights

[FREE Sales Forecasting Cheat Sheet](#)

#	Area	Final decision maker	Inputs required	Tie-Breaker Rule
1	Forecast commit	CRO (challenged by COO)	Pipeline, conversion, risk notes	COO escalates to CEO if +/-5% gap remains
2	Pricing guardrails	COO (Pricing Council)	Win/loss, elasticity, margin	Default to last approved guardrail
3	Territory design	COO	TAM, accounts, capacity/ramp	Favor customer experience & balance
4	Roadmap sequence	CTO/CPO (COO chairs)	Capacity, ARR impact, risk	NRR impact > feature parity
5	Hiring plan changes	CFO (COO/CHRO propose)	Productivity cohorts, runway	Freeze unless productivity gates met
6	Incident severity & response	Legal/Sec	Impact, SLA breach, regs	Customer protection > short-term revenue

Operating Cadence

[FREE Revenue Cadence Guide](#)

Meeting	Cadence	Purpose	Owner	Participants	Inputs	Outputs
Exec Meeting	Weekly	Unblock, decide, align	CEO	ELT	KPI scorecard, risks	Decisions log
Forecast Call	Weekly	Commit quality & risks	CRO	RevOps, Sales, COO	Pipeline by stage	Commit roll-up
Product Council	Bi-weekly	Sequence & readiness	COO (chairs)	CPO/CTO, GTM, CS	Capacity plan, roadmap	Go/No-Go, dependencies
Hiring/Ramp Review	Bi-weekly	Capacity & enablement	COO/CHRO	Sales/CS leaders	Ramp curves, time-to-fill	Open req decisions
Ops Review	Monthly	Variance & root-cause	COO	ELT + Owners	Scorecard, variance	Keep/drop/scale calls
Pricing Council	Monthly	Margin discipline	COO	CRO, CFO, RevOps	Win/loss, elasticity	Guardrail changes
Risk Review	Monthly	Incidents & vendors	COO/Legal	Ops, IT, CS	Risk register, MTRR	Mitigation owners
QBR	Quarterly	Earnings -> plan	COO/CRO	GTM leaders, CSMs, PMs	Cohorts, pipeline, churn	Next-quarter bets

Org, Culture & Communication

[FREE QBR Cheat Sheet](#)

Org Design & Reporting Map

Function	Dotted to	Charter (in one line)	Notes
RevOps	CRO/CFO	Pipeline, forecasting, pricing guardrails, KPI layer	Owns definitions & hygiene
CS Ops	CS Leader	Health scoring, renewal/expand motions, playbooks	Ties to NRR targets
PMO/Portfolio	CTO/CPO	Intake -> prioritize -> WIP limits -> retros	Roadmap sequencing, cross-team
Business Systems (CRM/CPQ/CS)	CIO/CTO	Admin + automation roadmap	Avoid dual admins
Data & Analytics (go-to-market)	CFO/CTO	KPI tree, exec scorecards, cohorts	One semantic layer
Implementations/PS (if applicable)	CS Leader	On-time activation; backlog age	May live in CS at smaller scale
Support/Service Ops	Support Leader	MTRR, deflection, cost-to-serve	Works with SRE/Eng for Sev-1
Vendor & Procurement Ops	CFO/Legal	aaS spend, renewals, SLAs	Price/usage governance
People Ops (partial)	COO (dotted)	Capacity, ramp SLAs, manager bar	CHRO owns policy/comp

Management Spans

Team	Target span	Max before risk	Layer note
Sales (AE) Mgmt	1:6-8	1:10	Add senior IC coach or lead
SDR Mgmt	1:8-10	1:12	Watch quality/coach time
CSM Mgmt	1:8-10	1:12	Depends on book complexity
PS/Impl. Leads	1:6-8	1:9	Project complexity drives cap
Support Team Leads	1:8-12	1:14	24/7 coverage affects span

GTM Capacity & Coverage

Role	Model Inputs	Output	Guardrail
AE	Quota, win rate, ASP, cycle time	Required opps/pipeline	Coverage ≥3-4x
SDR	Connect rate, meeting quality	Meetings/month	SQL-to-SQL conversion
CSM	Accounts by complexity	Ratio & book size	Health score bands

Leadership Rituals

Ritual	Frequency	Purpose	Proof
Wins & Learnings	Weekly	Reinforce progress	3 bullets in exec notes
Decision Log	Ongoing	Memory & accountability	Public log
Ask-Me-Anything	Quarterly	Transparency	Q&A recap

Change Playbook

Phase	Key Questions	Deliverable	Owner
Align on Why	Outcome? Cost of not changing?	Narrative one-pager	COO/CEO
Design What	Scope, guardrails, timeline	Plan on a page	Owner
Enable How	Training, tooling, comms	Enablement pack	Enablement
Measure	Success metrics, cadence	KPI sheet	COO
Reinforce	Recognition, course-correct	Rituals & coaching	Leaders

COO Dashboards & Metrics

[FREE B2B SaaS Metrics Cheat Sheet](#)

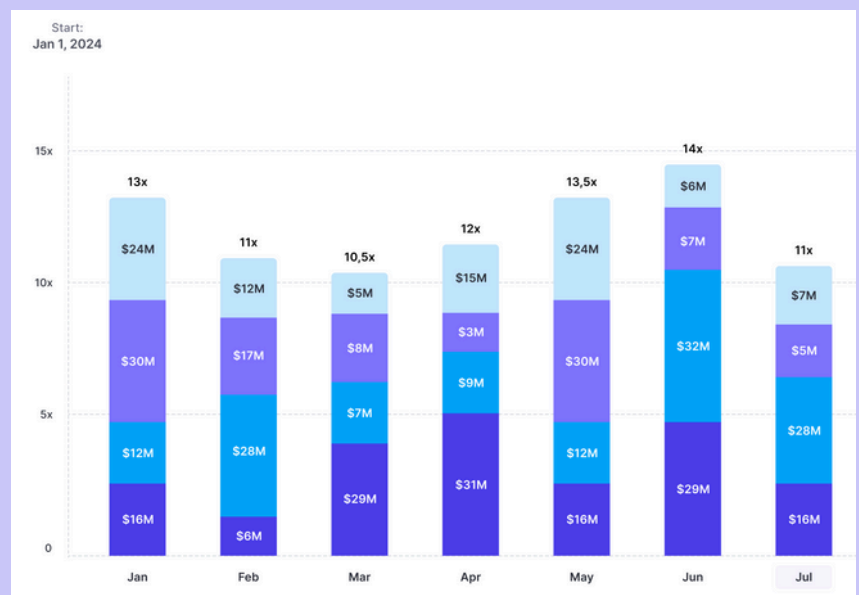
[FREE RevOps Board Reporting Cheat Sheet](#)

[FREE RevOps Reports & Dashboard Cheat Sheet](#)

[FREE Pipeline Visibility Cheat Sheet](#)

Pipeline Coverage

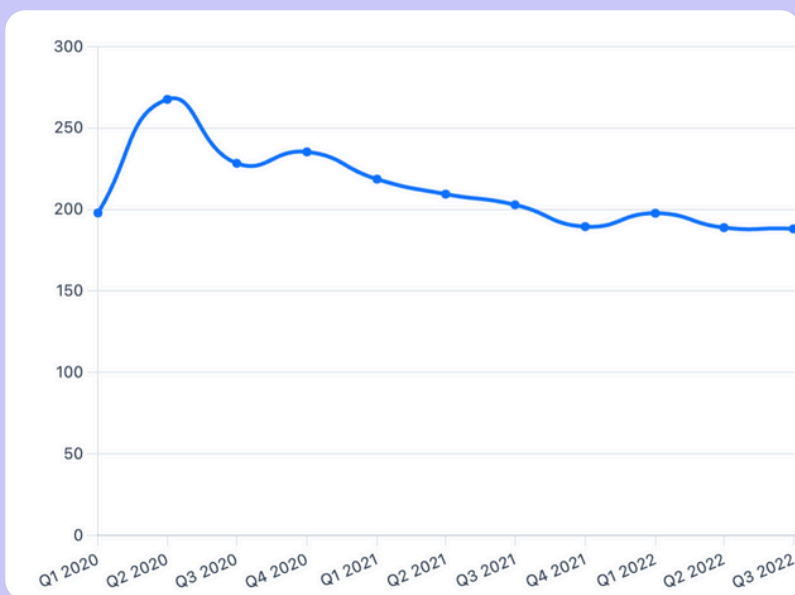
Analyze and track pipeline coverage to make sure you're on track to reach your revenue goals.



Source: Weflow (getweflow.com)

Sales Cycle Length

Measure sales cycle length by segment, geo, team, or rep to shorten your cycle length.



Source: Weflow (getweflow.com)

Forecast vs. Actuals

Forecast vs. Actuals is a tactical dashboard that compares predicted revenue (forecast) to actual closed revenue, helping teams measure forecast accuracy and improve future predictions.



Source: Weflow (getweflow.com)

New ARR/Bookings

Measure new ARR by segment, motion (SLO/PLG/Channel), region, and manager. This exposes where the engine truly produces vs. relies on discounts or outlier deals, and it tells you where to direct incremental capacity. Boards look for growth quality and whether productivity improves as headcount scales.

Opex % of Revenue

Operating expense as a share of revenue. It's the operating-leverage barometer - ensures growth scales with discipline. Leading indicators: Vendor spend trend, automation wins realized, utilization rates, hiring plan adherence, program ROI.

YoY ARR Growth

Track the year-over-year change in ARR, segmented by new vs. expansion and by segment/region. It shows whether growth is broad-based and durable or concentrated in discounts/one-offs - vital for capacity planning and board confidence.

Net Magic Number

Sales efficiency using net new ARR (new + expansion - churn); annualize the net change and divide by prior-quarter S&M spend. It tells you how effectively go-to-market dollars convert into ARR and whether to accelerate or pause hiring.

Headcount vs. Plan

Compare hiring plan vs. actuals hired, ramping, fully ramped, attrition. This is the foundation of revenue capacity modeling. Get to know if hiring delays or attrition are creating hidden risks for hitting future numbers.

Regretted Attrition % (by manager)

Percent of high performers leaving voluntarily, segmented by manager. Identifies leadership hotspots and protects capacity and culture. Leading indicators: eNPS/engagement trend, promotion velocity, manager span and 1:1 quality, exit-interview themes.

Price Realization %

Measure revenue captured vs. list/target price after discounts and terms. Low realization signals margin leakage or weak value proof; improving realization compounds CAC payback and GM%. Leading indicators: Discount rate by segment, exception volume, approval cycle time, competitive flags.

Net Revenue Retention (NRR)

Track NRR by cohort, segment, and product line. It's the cleanest read on durability - whether land/loyal/expand/renew is compounding or leaking. Boards use NRR to judge if growth is "real" and if expansion can offset macro softness.

Gross Margin %

Measure GM% by product/SKU and segment to see if growth scales profitably. Rising revenue with flat/declining margin flags pricing, packaging, or delivery inefficiency. Boards read GM% as operational discipline - can the company fund growth from gross profit, not just cash?

Gross Dollar Retention (GDR)

Measure the % of starting ARR retained from existing customers excluding expansion (i.e., after downgrades and churn only). It's your pure "stickiness" score - reveals whether the product's core value holds without upsell.

CAC Payback (in months)

onlor QM-adjusted CAC payback (S&M cost divided by net new ARR per month). This is your capital-efficiency speedometer and the gate for hiring. If payback worsens, slow adds and fix mix or conversion. Boards want to see payback improving QoQ, not diluted by aggressive scaling.

Expansion Rate / Net Dollar Expansion

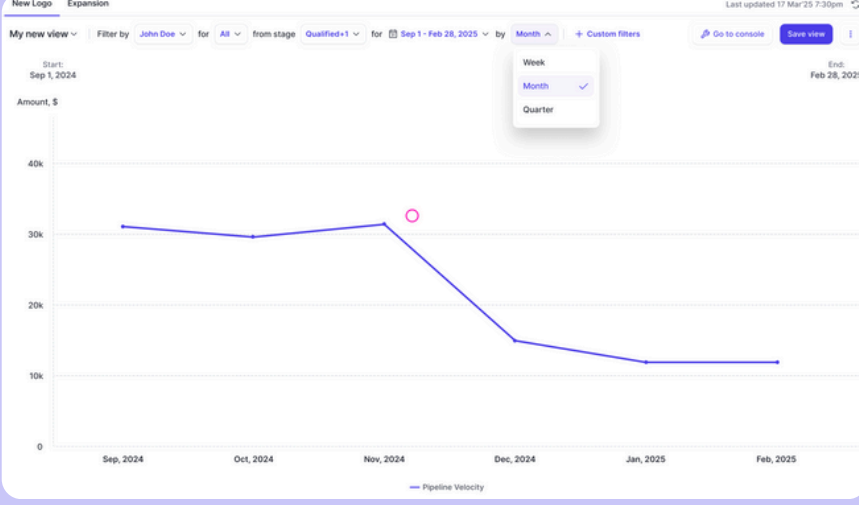
Track revenue growth within existing customers by cohort/segment. It shows whether adoption converts into dollars and whether GTM and product create compounding growth vs. constant new-logo pressure.

Net Dollar Retention (NDR / NRR)

Percentage of starting ARR retained including expansion (expansion minus downgrades/churn). It's the single best indicator of compounding growth and informs how much new logo pressure you truly need.

Pipeline Velocity

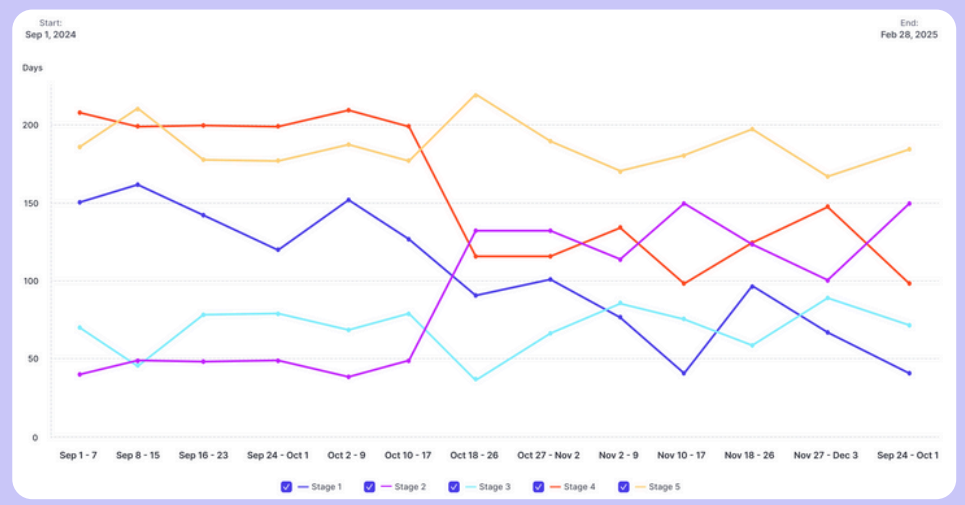
Pipeline Velocity is a key sales metric that measures how quickly qualified opportunities move through your sales pipeline to generate revenue. It reflects the speed and efficiency of your GTM engine.



Source: Weflow (getweflow.com)

Win rate

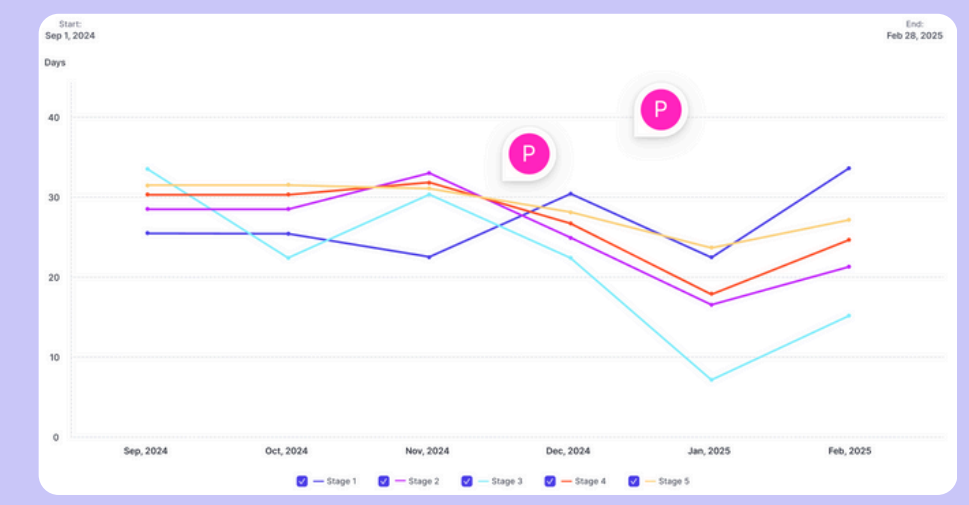
Win Rate is a fundamental sales metric that measures the percentage of deals closed-won out of total opportunities. It reflects how effectively your team converts pipeline into revenue.



Source: Weflow (getweflow.com)

Average time in stage

Average Time in Stage measures how long deals spend in each stage of the sales pipeline. It helps identify bottlenecks, inefficiencies, and potential risks in the sales process.



Source: Weflow (getweflow.com)

Sales Productivity

Measure ARR per rep, segmented by region, segment, and manager. This surfaces underperforming territories or managers and helps identify where incremental hiring should be directed. Boards want to see if productivity is improving over time or diluted by rapid scaling.

Manager-to-rep ratios

Show manager span of control vs. ideal thresholds (e.g., 1:8). Ratios above thresholds increase rep churn risk and slow ramp. COOs should check if leadership infrastructure is in place so productivity scales sustainably.

Rep Tenure vs. Productivity

Track how long reps take to reach peak productivity after hiring. If tenure isn't translating into higher attainment, it points to onboarding or enablement issues. Boards want to know if the company is building a scalable talent engine or burning through hires.

Support MTRR (& Sev-1 count)

Mean time to resolve plus the number of Severity-1 incidents. Reliability and recovery speed protect NRR and margin while signaling operational maturity. Leading indicators: First response time, backlog sign, reopen rate, KB/self-serve deflection %, on-call coverage health.

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

Activity Capture

Conversation Intelligence

Pipeline Intelligence

Forecasting & Analytics

weflow