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Revenue Planning Fast-Track Cheat Sheet for B2B companies

The Basics

Purpose

Hit target without burnout
Size quotas to modeled capacity (ramp, win rate, cycle length) so reps can realistically win

Fair books, fair pay
Balance territories by potential (not just count of accounts) so reps have comparable shots at goal, reducing disputes and attrition

Comp that drives outcomes
Keep plans simple with clear thresholds and accelerators so reps prioritize the right motions with healthy mix, disciplined pricing & multi-threading

Predictable, Accurate forecasts
Capacity-based math clarifies pipeline coverage needs and removes "hope" from commit, improving predictability for Sales and Finance

Inputs you need

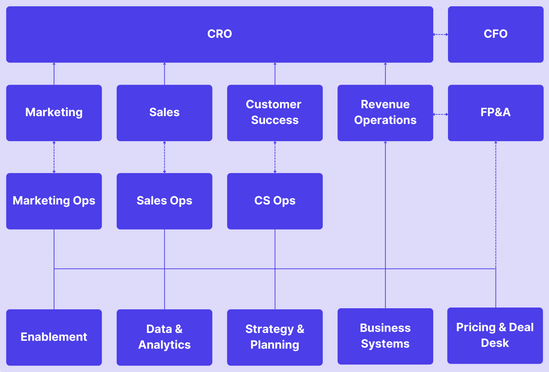
Input bucket	Exact Inputs you need	Why you need it	Where & how to source it
Headcount & ramp by role (AE, SDR, AM/CSM)	• Active sellers by role/segment • Start dates & ramp status • Ramp curve (month-by-month)	• Turns targets into time-phased selling capacity • Avoids overcounting new hires • shapes quarterly quotas	• HRIS/ATS for start dates • CRM user list for active sellers
Historical productivity (ARR/AE), win rate, sales cycle	• ARR/AE (median) by segment • Win rate by segment • Median sales cycle	• Sets the base rate your plan can support • Determines pipeline needed and realistic quarter timing	• CRM opportunity data (last 4-6 quarters)
Pipeline coverage & creation pace	• Current pipeline by segment/quarter • Coverage ratio (pipe ÷ quota) vs 3-4× target	• Confirms if you can sustain coverage (3-4×) and replace slipped/closed pipeline • Guides SDR/MKT goals	• CRM + Mutual Action Plan (HubSpot/Marketo)
Segmentation (ICP, geo, vertical)	• ICP tier • Industry/region • Size band (employees/revenue)	• Enables fair territories and focused plays • Prevents lopsided books • Informs quota by segment	• Clean CRM accounts with firmographics, enriched via ZoomInfo/Clearbit/LinkedIn

Implementation Tips

1. Use time-phased (monthly) models for headcount and ramp
2. Favor medians over averages, analyzed by segment/ACV band
3. Maintain a simple assumptions tab that everyone can access
4. Recalculate weekly during planning; freeze assumptions at go-live

Keep it simple and align everyone on one version of truth!

Org. Design



Archetypes	Best For	Cautions
Segmented (SMB/MM/ENT)	Companies with diverse ACVs and sales cycles	Requires clear rules of engagement and comp alignment
Geo-Based (East/West)	Global go-to-market or regional buyers	Needs strong playbook consistency and enablement across regions
Pod-Based (SDR+AE+SE)	Velocity-oriented orgs (esp. MM)	Pod output may vary; requires strong management and alignment
Product-Line Based	Multi-product companies with unique buyers	Can create siloed behavior - needs RevOps and CS to unify motion

The Process

RevOps Lab Podcast episodes on Annual vs. Continuous Planning, #95 — FREE Annual GTM planning Cheat Sheet

1 Capacity Planning

Goal: Turn targets into a time-phased, realistic selling capacity plan by role and segment

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

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.

Deliverables

Output	Description
Capacity model (sheet)	• Rows for hires with start date, ramp %, attrition, and monthly capacity • Include formulas for pipeline per rep and headcount gaps
Scenario matrix	• Base / Upside / Downside with revenue, cost, and hiring deltas to guide investment calls
Revenue driver tree	• ARR to new vs. expansion to channels to rep productivity, so Finance/Sales see how the math connects.

Capacity planning 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

2 Territory Design

RevOps Lab episode on territory design: #42

Goal: Give every rep a fair, focused book and match selling capacity to territories

Five-Steps Workflow

1. Account segmentation
- Use an ICP gate (yes/no); If yes, score potential = ICP fit (1–3) × Intent (1–3) × Whitespace (1–3); break ties with ARR band
- Freeze fields (industry, size, region, tech, parent/subsidiary, current spend) before mapping

2. Territory mapping
- Choose the cut: Geo / Segment / Vertical / Strategic; then equalize total potential score per book
- Keep a simple roster: rep - book - potential score, plus clear coverage notes

3. Coverage modeling
- Tie to the capacity model - check accounts-per-rep against meeting bandwidth and ramp, include SDR/SE ratios, rebalance boundaries or add support if overloaded.
- Each book must support pipeline = quota ÷ win rate and maintain 3–4× coverage at the segment level

4. Performance review
- Compare past attainment with the new book's potential; flag over/under-resourced books
- Use findings to move boundaries or add support (SDR/SE), not just shuffle reps

5. Optimization cycle
- Set a bi-annual refresh with a lightweight change log so reps understand the "why"
- Collect structured rep feedback; fix data gaps and rebalance before next quarter
- Publish a one-pager change log (what/why/who/when) each time

Deliverables

Output	Description
Account Master & Potential Model	• Clean, deduped account list with required fields (industry, size, region, ICP tier) plus a simple scoring model (e.g., ICP tier + firmographics + intent/usage) that assigns a potential score to every account. This becomes the locked "source of truth" for mapping
Territory Map & Rep-to-Book Roster	• Final geo/segment/vertical boundaries in one view, with strategic accounts flagged, paired with a roster showing rep
Coverage & Optimization Pack	• Coverage & capacity check (accounts-per-rep, meeting load, win rate, 3–4× coverage status) • Performance variance view (attainment vs. potential to justify rebalancing) • change log + refresh calendar for bi-annual tune-ups

Capacity planning pitfalls (+ fixes)

Pitfall	Impact	Fix
Designing by account count instead of potential	• Lopsided books • Unfair attainment odds	• Weight books by ARR/TAM/ICP tier • Redistribute top-potential accounts • Sanity-check with accounts-per-rep vs. bandwidth
Books fail coverage (can't support 3–4×)	• Forecast risk • Reps chase low-quality pipe	• Rebalance accounts; narrow segments • Raise SDR/MKT targets to hit required net-new pipeline
Ignoring capacity & ramp	• Overloaded new reps • Slow time-to-quota	• Size books to meeting bandwidth • Trim early-ramp books • Add SDR/SE support until fully ramped
Messy data (missing industry/size, etc.)	• Bad maps • Endless disputes	• Clean fields in bulk pre-go-live • Enforce required fields • Freeze the master account list for mapping
No change clarity	• Confusion • Lost selling time	• Publish a one-pager change log with effective date • Notify affected reps and managers

3 Quota Planning

Goal: Convert modeled capacity and territory potential into fair, time-phased quotas that most reps can realistically achieve

Quota Planning Workflow

Step	Description	What to do
1. Reality Check	Anchor quotas in modeled capacity and territory potential so they're supportable.	• Pull segment medians (win rate, cycle, productivity) • Confirm 3-4× coverage is feasible • Set a quota ceiling by role/segment
2. Choose Quota Architecture	Define how quotas work by role and motion, including ramp logic.	• Pick units (ARR/bookings; AM/CSM: GRR/NRR) and motion split • Decide ramped monthly vs fully ramped structure • Document exceptions needing a different unit/mix
3. Calibrate for Attainability	Design the distribution so most reps can realistically hit.	• Target 70-80% of fully ramped reps hitting • Set floor / median / stretch per segment and cap variance • Apply a calibration factor (≈0.85-0.95 of modeled capacity) adjusted for book potential
4. Time-Phase & Publish	Turn annual targets into executable monthly/quarterly numbers.	• Apply seasonality and start dates • Layer in ramp curves and effective dates; include proration rules • Generate rep-level sheets and embed transfer/leave rules
5. Reconcile & Sign Off	Align bottom-up math with the top-down plan and lock it.	• Run Base / Up / Down scenarios • Finalize the quota workbook + attainment curve (P10/P50/P90) • Approve with CRO/CFO and freeze assumptions

Exception cases + how to handle them

Case	Rule (how to handle)	Example math	Notes
Late hire (joins mid-period)	• Pro-rate by working days active and apply ramp curve for those days	• Monthly quota $100k; start on day 11 of 20 workdays • Ramp month = 40% → $100k × 40% × (10/20) = $20k	• Effective date = start date • No retro changes
Territory transfer (mid-period)	• Split quota by working days in each book • keep the same ramp curve	• $90k month • Move on day 16/20 → Old: $90k × (15/20) = $67.5k • New: $90k × (5/20) = $22.5k	• Document both books • Change log entry with effective date
Leave of absence	• Pause quota for full calendar days on leave • Resume ramp on return	• $120k quarter • 30/90 days on leave → $120k × (60/90) = $80k	• Attach HR documentation • Keep quota math separate from comp draws

Deliverables

Output	Description
Quota Workbook	• Role/segment tabs with monthly ramp, start dates, transfers/leaves logic, and effective dates and outputs rep-level quotas.
Attainment Curve	• A simple P10/P50/P90 view showing expected distribution; used to monitor the "70-80% hit" design.
Reconciliation Table	• Side-by-side top-down vs bottom-up by segment, with Base/Up/Down scenarios and chosen decision.
Change Policy One-Pager	• Clear rules for mid-year changes, territory moves, backdated deals, and exceptions - plus examples.

Capacity planning pitfalls (+ fixes)

Pitfall	Impact	Fix
Top-down only quotas	• Low attainment • Forecast misses	• Start from capacity + territory potential • Reconcile with Base/Up/Down and document the gap decision • Show headcount/pipeline deltas required for each scenario
No ramp logic	• Overloaded new hires • Slow time-to-productivity	• Use monthly ramped quotas tied to cohort curves and start dates • Track ramp vs fully-ramped attainment separately
Quota inflation as "stretch"	• Sandbagging or burnout	• Calibrate to 70–80% hit rate • Set floor / median / stretch and stick to it • Monitor P10/P50/P90 monthly and flag drift
Book quality variance ignored	• Disputes • perceived unfairness	• Adjust by segment/potential; cap variance between similar books • Document exceptions
Seasonality skipped	• Spiky misses • cash-flow surprises	• Time-phase quotas by month/quarter using past seasonality • Smooth where needed • Align MKT/SDR targets to the same seasonal curve
Policy ambiguity	• Endless escalations	• Publish change policy and log exceptions in one place with effective dates

FREE B2B Sales Hiring Cheat Sheet

4 Comp Planning

Goal: Make it simple for reps to know what to do and profitable for the business when they do it

Design Principles

- **Clarity over complexity** — 1-2 core measures per role; plain math; no hidden levers.
- **Behavior = outcome** — Pay on what you want more of (e.g., new ARR, multi-year, healthy discounting)
- **Attainable, not easy** — Plans assume realistic quotas; upside for top performance, not lottery tickets.
- **Budget-aware** — Model total comp cost at base / upside / downside.
- **Policy-first** — Thresholds, accelerators, proration, and changes live in one short policy doc.

Comp Planning Workflow

Step	Description	What to do
1. Define role objectives	Tie each role to 1-2 outcomes	• AEs: new ARR (and maybe multi-year/expanders); AM/CSM: renewals + expansion; SDR: qualified meetings/opps
2. Choose pay mix & measures	Set OTE mix and KPI(s) per role	• AEs 50/50; AM/CSM 60/40 or 70/30; SDR 70/30. • Units: ARR/bookings for sellers, GRR/NRR for AM/CSM, SQOs for SDR. • Use post-discount figures as default units
3. Design the payout curve	Make performance to earnings predictable	• Set threshold (e.g., 80%), target (100%), accelerators (e.g., 110%+), and penalties (e.g., heavy discount) with math linear with one accelerator tier
4. Add strategic modifiers	Nudge high-value behaviors without clutter	• Examples: +10-20% kicker for multi-year/prepaid. small kicker for new logo or strategic product, neutral on basics
5. Model cost & scenarios	Ensure plan ROI works at different outcomes	• Simulate base / upside / downside (e.g., 70%, 100%, 120% attainment). Include headcount, ramp, and seasonality
6. Lock policy & enable	Prevent ad-hoc exceptions later	• Publish one-pager: proration rules, territory transfers, SPIFF governance, clawbacks, FX, crediting, timing. Roll into comp system

Payout defaults (use as starting points)

Role	Core measure(s)	Threshold	Accelerator	Notes
AE (new logo / expansion)	New ARR (optionally weight multi-year)	~80%	1.2-1.5x rate at 110-130%	Consider decel below 80%; pay on booked ARR net of discount
AM/CSM	GRR and/or NRR (renewals + expansion)	~90% GRR	1.1-1.3x on NRR > target	Keep GRR as guardrail; avoid over-weighting churny upsell
SDR	SQOs (stage-qualified opps)	Activity floor + SQO threshold	Small kicker for pipeline quality	Time-box credit (e.g., 60-90 days to stage progress)

Deliverables

Output	Description
Comp Plan Sheets (by role)	One page per role: pay mix, measures, payout curve (rates/tiers), threshold, accelerator, examples
Cost Model (scenarios)	Workbook that projects total comp cost vs. bookings/ARR at 70/100/120% attainment with headcount & ramp
Policy One-Pager	Proration, transfers, leaves, clawbacks, discounting, crediting, FX, SPIFF governance, payment timing
Rep Explainer	A "how you get paid" sheet with two worked examples (at 80% and 120%) - Zero jargon

Sanity Check & Common Pitfalls (+ fixes)

Pitfall	Impact	Fix
Too many levers (3–4+ measures)	Confusion; gameable plan	• Limit to 1-2 measures; move the rest to SPIFFs or manager scorecards • Use plain linear math with a single accelerator tier (avoid micro-tiers)
No threshold	Paying for low performance	• Set ~80% threshold for AEs; ~90% GRR guardrail for AM/CSM
Over-reliance on SPIFFs	Expensive, inconsistent behavior	• Time-box SPIFFs; align to one strategic focus per quarter
Ignoring discounting	Revenue without margin	• Pay on net ARR; add decel below floor (e.g., >30% discount)
No scenario cost check	Surprise comp overruns	• Model base/upside/downside; review monthly vs. budget • Include headcount/ramp sensitivity and OTE-mix impact
Policy gaps	Escalations, one-offs	• Publish the one-pager; log exceptions; "no retro" rule after close • Add a clear approval path (Mgr - RevOps - Finance) with worked examples

Stakeholders Responsibilities

CRO / Head of Sales — Sets stance and trade-offs; signs off quota ranges, final territory moves, and how comp backs priorities; pressure-tests capacity realism.

CFO / FP&A — Provides budget guardrails; validates capacity affordability; shapes risk posture on quotas; ensures comp cost curves work across scenarios.

RevOps (owner) — Builds the models and runs the process—capacity model, territory balancing, quota calibration, and comp design/policy with clean data.

Sales VPs / RVPs — Brings field reality; recommends territory boundaries and account placement; calibrates quota attainability; flags capacity gaps (hiring, SE/SDR ratios).

Sales Managers — Day-to-day execution lens; validates rep capacity/ramp; surfaces unfair territories; proposes small quota adjustments within policy; enforces comp crediting.

Marketing / Demand Gen — Commits pipeline to support capacity/quotas; runs segment/geo plays aligned to territories; partners on kickers/SPIFFs so comp reinforces focus.

CS / AM Leadership — Anchors renewals/expansion; supplies expansion pool for capacity; shapes AM/CSM quota (GRR/NRR); aligns comp to healthy retention/upsell.

IT / Systems (CRM/CPQ) — Implements rules so it runs at scale - territory logic, quota uploads, comp crediting/tiers in CRM/CPQ; maintains data needed to track capacity.

AE / Sales Manager Benchmarks (USA)

Segment	Base Salary	OTE	Quota Range
SMB AE	$55K–$75K	$100K–$130K	$400K–$600K
Mid-Market AE	$70K–$90K	$150K–$180K	$700K–$1M
Enterprise AE	$90K–$140K	$200K–$300K+	$1.2M–$2M+
Sales Manager	$100K–$130K	$180K–$240K+	Team quota: $2M–$5M+

(Source: RepVue, OpenComp, Betts Recruiting)

VP of Sales Benchmarks (USA)

Stage	Base Salary	OTE	Equity Range
$1M–$5M ARR	$160K – $180K	$250K – $300K	0.5% – 1.0%
$5M–$20M ARR	$180K – $200K	$300K – $400K	0.3% – 0.7%
$20M–$50M ARR	$200K – $225K	$350K – $450K	0.15% – 0.4%
$50M–$100M ARR	$225K – $250K+	$400K – $500K+	0.05% – 0.2%

(Source: RepVue, OpenComp, Betts Recruiting)

Metrics & Dashboards

FREE Reporting & Dashboards Cheat Sheet

Quota attainment
Track the % of reps hitting quota, split between ramping vs. fully ramped reps. This avoids misleading averages where ramping reps drag down attainment. Boards care whether the mature core team is performing, since it reflects the strength of the sales engine beyond new hires.

Rep 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., 1:6). Ratios above thresholds increase rep churn risk and slow ramp. Boards want to see leadership infrastructure 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.

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

Ramp Time Actuals
Compare modeled ramp time (e.g., 6 months) vs. actual time to full productivity. Extended ramp times erode capacity and can explain missed numbers despite headcount growth. This dashboard highlights enablement or onboarding gaps RevOps needs to address.

Meeting/ Email/ Call volume
Measures the number of meetings held, emails sent, or calls made over a given period.
Why it matters: Indicates activity levels and outreach effort; useful for tracking rep productivity and engagement cadence.

Source: Weflow (getweflow.com)

Meeting duration
Measures the average length of meetings.
Why it matters: Helps evaluate meeting efficiency and depth—too short may indicate poor prep, too long may signal scope drift.

Source: Weflow (getweflow.com)

Time spent in meetings
Measures the total time a rep or team spends in meetings.
Why it matters: Useful for workload visibility and capacity planning; high meeting load may impact selling time.

Source: Weflow (getweflow.com)

Email response time
Measures the average time it takes to respond to incoming emails. Why it matters: Faster response times improve buyer experience and can accelerate deal cycles.

Source: Weflow (getweflow.com)

Email reply rate
Measures the percentage of emails that receive a reply.
Why it matters: Indicates message effectiveness and prospect engagement - ow rates may reflect weak targeting or messaging.

Source: Weflow (getweflow.com)

Team response time
Measures how quickly the team collectively responds to buyer or customer inquiries across channels. Why it matters: Strong predictor of customer satisfaction and sales velocity—sluggish response times can hurt conversion and retention.

Source: Weflow (getweflow.com)

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

weflow

- **Activity Capture**
- **Conversation Intelligence**
- **Pipeline Intelligence**
- **Forecasting & Analytics**