Operationalizing Your 2026 GTM Plan: A 90-Day RevOps Guide

Foundations

What this cheat sheet will help you accomplish

By the end of this cheat sheet, you will be able to:

Turn the annual plan into a clear execution model
Break your top-line targets into segments, teams, and rep-level numbers, with simple assumptions you can explain to your CRO and board

Make GTM rules crystal clear for the field
Define who owns which accounts, leads, and customers; how opportunities move through stages; and how quotas and comp connect to the plan

Embed the plan into your systems and reporting
Configure CRM and core tools so territories, quotas, routing and key metrics are live, enforced, and visible in a small set of reliable dashboards

Give managers and reps a clear picture of their year
Equip managers with the views and talking points they need, and give every rep a simple "my number, my book, my comp, what's changed" view

Run a focused revenue operating rhythm
Set up a practical weekly, monthly, and quarterly review cycle that turns data into specific decisions and follow-ups, not just status updates

Spot issues early and adjust without chaos
Track a short list of leading and lagging indicators, know which levers to pull when things go off track, and make changes without breaking trust with the field

Think of this as your playbook for the first 90 days of execution and the backbone you'll use to steer the plan for the rest of the year

Planning Timeline

FREE Annual Planning Cheat Sheet | FREE Sales Kickoff Cheat Sheet

Pre-planning | Modeling & execution prep | Go-live & Execution

August | September | October | November | December | January

	Pre-planning		Modeling & execution prep		Go-live & Execution
Objective	Set foundational inputs, timelines and milestones	Objective	Build + vet base / upside / downside scenarios. Finalize headcount, quotas and enablement plans.	Objective	Finalize plan, enable the field, and launch systems for go-live
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	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	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: Run SKO, define checkpoints & operationalize the plan

Guiding principles for Operationalizing Your GTM plan

1 One set of numbers
If there are multiple versions of "the number", you'll spend the year in reconciliation mode
- Make sure targets, quotas, and attainment all come from the same source of truth.
- If you change a number, it changes everywhere.

2 Clarity beats cleverness
Reps and managers should be able to explain how things work in a few sentences
- Keep rules for territories, routing, quotas, and comp simple enough to remember.
- If you need a long FAQ to explain it, it's probably too complex.

3 Design for managers and reps first
If they don't understand it, it won't get executed.
- Start from: "What does my frontline manager need to run their team each week?"
- Give every rep a clear view of my number, my book, my comp, what's changed.

4 Make everything inspectable
You don't want heroics; you want repeatable inspection.
- For every key area (pipeline, forecast, productivity, renewals), define: "Where do we look? With which view? How often?"
- Build the views before you need them in a tense QBR.

5 Bias to leading indicators
Don't wait for missed quarters to tell you the plan is off.
- Watch coverage, pipeline build, win rates, activity, and ramp vs. plan.
- Use lagging metrics (bookings, NRR, quota attainment) to confirm, not to lead.

6 Iterate, don't re-plan from scratch
Annual planning is not a one-shot; it's a series of controlled adjustments.
- Use your operating rhythm to course-correct in small, deliberate steps.
- Avoid constant "shadow replanning" in side channels.

60-second readiness self-check

List of Questions
Do we have signed-off ARR/NRR targets, broken down by segment/region?
Have we picked a base plan/scenario that everyone is planning against?
Is our GTM org and coverage model documented and agreed by leadership?
Is there a named exec sponsor for GTM execution and a RevOps owner for this plan?
Do we have one CRM as the source of truth for accounts, opportunities, and pipeline?
Can we see last year's GTM metrics (pipeline, win rate, cycle, etc.) in one place?
Are our core GTM meetings (weekly pipeline, QBRs, etc.) defined on the calendar?
Do we have a simple written policy for changes to territories, quotas and comp?

How to read your score:
- 0-2 "No" answers → You're ready. Move on to operationalizing the plan.
- 3-4 "No" answers → You can proceed, but expect friction; fix these in parallel.
- 4+ "No" answers → Pause and shore up these basics before you rely on this cheat sheet.

What must be ready by now?

Targets & strategy — FREE Revenue Planning Cheat Sheet

Readiness item	What must be in place	Primary owners
Company targets signed off	Board / exec-approved ARR/NRR targets for the year (new, expansion, churn)	CEO, CRO, CFO
Segment & geo breakdown	Targets split by segment (e.g. SMB/MM/ENT), region, and motion (new vs. existing)	RevOps
Scenario chosen	Base / downside / upside scenario selected with clear assumptions (win rate, ASP, ramp, etc.)	CRO, RevOps
Top priorities defined	3-5 strategic bets for the year written down (e.g. "move upmarket", "land expansion in product X")	CEO, CRO, CMO
Budget envelope agreed	High-level sales & marketing investment envelope agreed (headcount, programs, tools)	CFO, FP&A, CRO

GTM design & people

Readiness item	What must be in place	Primary owners
GTM org chart	Current GTM org structure documented (Sales, CS, Marketing, RevOps, Partners) with key roles	CRO, CCO, CMO, HR
Role definitions	Clear role scopes (AE, SDR, AM, CSM, SE, Partner, etc.) and ownership across the customer journey	CRO, CCO, RevOps, HR
Coverage model	High-level coverage model agreed (by segment/region/vertical) and how accounts are assigned	RevOps, CRO
High-level HC plan	Headcount plan and ramp assumptions by role and region aligned with the targets	FP&A, RevOps, CRO
Exec sponsor named	One exec clearly sponsoring GTM execution (usually CRO or COO)	CEO, CRO/COO
RevOps owner named	Single RevOps leader accountable for driving this operationalization plan	CRO, Head of RevOps

Systems, data & reporting — FREE Reports & Dashboards Cheat Sheet

Readiness item	What must be in place	Primary owners
System of record chosen	Primary CRM named as the single source of truth for accounts, opportunities, pipeline, and bookings	CRO, RevOps, IT
Stack inventory	List of core GTM tools (CRM, marketing automation, CS platform, CPQ, BI) and how they connect	RevOps, IT
Data health baseline	Basic data quality baseline captured (e.g. % accounts with segment/industry/owner filled)	RevOps, Data/BI
Historical metrics ready	Last 12-24 months of key GTM metrics available (pipeline, win rate, cycle length, attainment, NRR)	RevOps, Data/BI
Reporting layer in place	A BI/reporting tool or CRM dashboards in place to show plan vs. actual at company/segment level	RevOps, Data/BI

Governance & forums

Readiness item	What must be in place	Primary owners
Operating forums defined	List of key GTM meetings (weekly pipeline, forecast, productivity, QBR, etc.)	CRO, RevOps
Cadence & owners set	Each forum has a frequency, owner, and core attendee list	CRO, RevOps
Decision rights agreed	Clear view on who can approve changes to headcount, territories, quotas, pricing, and budgets	CEO, CRO, CFO
RACI for GTM changes	Simple RACI for major GTM decisions (who proposes, who approves, who executes)	RevOps, CRO
Planning calendar	Annual calendar showing major planning/replanning moments (budget reviews, QBRs, board)	FP&A, RevOps
Escalation path	Defined path for "stuck" issues (e.g. territory conflicts, comp disputes)	CRO, RevOps, HR

Change & comms scaffolding

Readiness item	What must be in place	Primary owners
Kickoff plan	Date and format set for SKO / GTM kickoff or equivalent (even if basic)	CRO, Sales Leadership, Enablement
Comms owner named	One person/team clearly owning comms to the field about GTM changes	RevOps, Enablement, Internal Comms
Enablement owner named	Clear owner for sales & CS enablement content and sessions	CRO, CCO, Enablement
Change policy drafted	Simple written policy for changes to territories, quotas, and comp (when, how often, effective dates)	RevOps, CRO, HR
Channel for updates	Agreed channels for sharing GTM updates (e.g. Sales Slack channel, newsletter, all-hands)	RevOps, Comms, Enablement
Feedback loop set up	Mechanism for managers/ICs to raise issues and questions (e.g. form, channel, office hours)	RevOps, Sales/CS Leadership

Workstreams to Operationalize your Annual GTM Plan

RevOps Lab Podcast episodes on Annual vs Continuous planning #97

Workstream 1: Turn your annual plan into an execution blueprint

FREE Revenue Planning Cheat Sheet

Turn the 2026 plan into clear numbers, levers and owners

Goal

Make the annual GTM & revenue plan executable so that:
- You can explain how you hit the number in simple math.
- Every team and rep has a clear, defensible number.
- A few named workstreams and assumptions drive what you focus on in the first 90 days.

Step	Output
1. Build the model	A one-page driver view of how you hit the number
2. Set numbers	A target & quota grid by segment / region / team / rep
3. Define key Workstreams	A workstream list with owners and 90-day milestones
5. Capture assumptions	An assumptions log tied to specific metrics and review forums

Step 1: Build a simple "how we hit the number" model

Create a light, explicit model that shows how ARR/NRR is built across segments, regions, and motions

Action	Key partners
Break ARR/NRR into chunks (new vs expansion, segment, region, motion)	FP&A
For each chunk, define required pipeline, win rate, and average deal size	Data/BI
Compare assumptions with last year's actuals and adjust where needed	CRO
Summarize the model on a one-pager for exec review	FP&A

👉 Outcome: a one-page driver view that explains "how we hit the number" in plain language and simple math.

Step 2: Turn company targets into team & rep numbers

Translate the model into concrete team and rep quotas that roll up cleanly to the plan

Action	Key Partners
Set team quotas by segment/region that align with the model	CRO, FP&A
Check team quotas against capacity (ramped reps × expected productivity)	FP&A
Allocate rep-level quotas using simple rules (tenure, territory potential, role)	Sales
Review and finalize quotas with frontline managers	Managers

👉 Outcome: You have a clear target & quota grid by segment, region, team, and rep that rolls up cleanly to the 2025 plan

Step 3: Choose key workstreams, owners & milestones

Decide which 3-5 workstreams will actually move the plan in Q1, and who will drive them

Action	Key partners
List the critical workstreams (e.g. Coverage & Quotas, Systems & Data, Enablement, Operating Rhythm, Signals & Adjustments)	CRO
Write a one-line purpose and "must be live by day 90" for each workstream	Workstream leads
Assign a single accountable owner (by name) to each workstream	CRO
Define 2-4 dated milestones and key dependencies per workstream, and share the 90-day plan with GTM leadership	Sales Ops, CRO

👉 Outcome: You have a focused workstream plan: a small set of trains, each with a clear purpose, owner, and 90-day landing dates.

Step 4: Write down your key assumptions

Make the few assumptions that can break the plan visible and testable

Action	Key Partners
List 5-10 critical assumptions (ramp, win rate lift, pipeline mix, etc.)	FP&A, CRO
Map each assumption to a metric (e.g. ramp vs plan, win rate, pipeline by source)	Data/BI
Decide in which meeting each metric will be reviewed (e.g. forecast call, monthly review)	CRO
Store this as a simple "assumptions log" and share with GTM leadership	FP&A, CRO

👉 Outcome: You have a simple assumptions log, tied to concrete metrics and forums, that will feed straight into your "Signals & adjustments" workstream later

Workstream 2: Operationalize GTM mechanics

This is where you decide who sells to whom, on what rules, and make it clear enough that managers and reps don't have to guess

Goal

Make your GTM mechanics simple, fair, and unambiguous so that:
- Every account has a clear owner.
- Leads and opportunities follow a clear path.
- Conflicts are rare, and easy to resolve when they happen.

Step	Output
1. Design coverage	A coverage model showing which roles cover which segments/regions
2. Assign books	A territory & account assignment list with effective dates
3. Define lifecycle & routing	A lead → opportunity → customer → expansion map with stages and SLAs
4. Set rules of engagement	A rules of engagement one-pager with clear ownership and examples

Step 1: Design your coverage model

Agree how different customer segments are covered by sales and CS roles

Action	Key partners
Decide how you segment customers (e.g. size, region, industry, product line) and which roles cover each segment	CRO, Sales leadership
Tier accounts into a small number of focus levels (e.g. A/B/C or 1/2/3)	Sales leadership
Choose territory shapes (named accounts, regions, verticals, or pods) for each role	Sales & CS leadership
Do a quick capacity check: number of accounts per rep by tier and segment	FP&A

👉 Outcome: You have a simple coverage design that shows which roles cover which customers by segment and region

Step 2: Turn coverage into territories and account books

Translate the design into actual territories and account books

Action	Key Partners
Generate a draft list of accounts per territory / rep based on the coverage model and tiers	Sales leadership
Apply simple rules for shared or special accounts (house accounts, strategic accounts, partner-owned, etc.)	CRO, Partner leadership
Review drafts with managers to catch obvious imbalances or conflicts (too many large accounts, travel/logistics issues, etc.)	Frontline managers
Freeze a territory & account assignment list with an effective date	CRO, HR

👉 Outcome: You have a clear territory and account assignment list that can be loaded into systems and shared with the field

Step 3: Define lifecycle, routing and SLAs

Make the path from lead → opportunity → customer → expansion explicit and enforceable

Action	Key partners
Sketch the end-to-end flow: how inbound, outbound, and partner leads move to qualified opportunities, then to customers and expansion	GTM Leaders & Marketing, Sales & CS Ops
Define a small set of stages and exit criteria (what must be true to move forward)	Sales & CS leadership
Set routing rules: who gets which leads and accounts, and when ownership changes	Marketing Ops, Sales
Define basic service-level agreements (SLAs)	Sales & CS

👉 Outcome: You have a clear lifecycle and routing map that can be implemented in CRM and used in your operating rhythm.

Step 4: Write rules of engagement and connect them to incentives

Remove ambiguity about who owns what in tricky situations, and make sure incentives align

Action	Key Partners
List common scenarios (new logo, upsell, cross-sell, renewal, partner-involved deals, territory changes) and assign clear ownership for each	CRO, CCO
Define simple conflict rules (who wins when two reps touch the same account)	Sales leaders
Align quota credit and commission at a high level with these ownership rules	Finance/Comp
Package this into a short rules-of-engagement one-pager with examples, and review it with managers	Sales leadership, Enablement

👉 Outcome: You have a concise rules-of-engagement guide that managers and reps can use to resolve ownership questions quickly and fairly

Workstream 3: Implement in systems & data

This is where the plan stops living in slides and sheets, and starts living in your CRM and tools as the single source

Goal

Encode the annual plan into your systems so that:
- Territories, owners, and quotas are visible and enforced,
- Key metrics are defined once and reused everywhere,
- Leaders, managers, and reps can all see plan vs actual in a few standard views.

Step	Output
1. Map the plan to systems	A systems impact map showing what changes where
2. Configure CRM & load key data	CRM and core tools configured with territories, routing, lifecycle, and quotas
3. Define metrics & reporting views	A short metric dictionary and a list of standard dashboards/views
4. Run pre-flight tests & cut over	A go-live checklist with sign-off and a small known-issues list

Step 1: Map the plan to systems

Connect decisions from Workstream 1 and 2 to the actual tools and data models

Action	Key partners
List your core GTM systems (CRM, marketing automation, CS platform, CPQ, billing, BI) and who owns each	IT, RevOps
For each big decision (coverage, territories, routing, stages, quotas), note which system needs to change and what needs to be configured	Sales & CS Ops
Decide the source of truth for key objects (account, contact, lead, opportunity, product, booking, renewal) and key numbers (ARR, pipeline, NRR)	Finance, Data/BI
Agree on where work is done first (sandbox vs production), and the order of changes across systems	IT, RevOps

👉 Outcome: You have a simple map of what needs to change in which system, so you don't miss key pieces or duplicate work

Step 2: Configure CRM & load key data

Turn the design into live configuration and numbers

Action	Key Partners
Set up teams, territories, and account ownership in CRM based on the coverage and territory decisions	Sales Ops
Implement routing rules and basic SLAs for leads, contacts, and opportunities	Marketing Ops & Sales
Load team and rep quotas into the right place (CRM, comp tool, or both) and tie them to owners	Finance/Comp, Sales Ops
Review access, roles, and standard views so leaders, managers, and reps can see what they need	IT, Sales leadership

👉 Outcome: Your CRM and core tools reflect the new year's structure and numbers, and enforce the GTM mechanics you agreed on

Step 3: Define metrics & reporting views

Create a light, explicit model that shows how ARR/NRR is built across segments, regions, and motions.

Action	Key partners
List the key questions for execs, leaders, managers, and reps (e.g. "Are we on track for Q1?", "Which segment is off?", "Is ramp on plan?")	CRO, Sales leadership
Translate those questions into a short list of core metrics (pipeline, coverage, win rate, cycle, attainment, NRR, etc.)	Data/BI, FP&A
Write simple definitions for each metric (what counts, which stages, which dates, which segments) in a metric dictionary	Data/BI
Build a small set of standard dashboards/views (Exec, Sales/CS leadership, Manager, Rep) using those definitions	Data/BI, RevOps

👉 Outcome: You have a consistent set of definitions and dashboards so everyone is looking at the same numbers, the same way

Step 4: Run pre-flight tests & cut over

Translate the model into concrete team and rep quotas that roll up cleanly to the plan

Action	Key Partners
Create a few test users (AE, SDR, manager, CSM) and walk through common flows end-to-end in a safe environment	Sales, CS & Marketing Ops
Check that territories, routing, stages, quotas, and views behave as expected; log issues in a simple list	Sales & CS leadership
Fix high-risk issues (e.g. routing breaks, missing quotas, wrong permissions) and tag lower-risk items for later	IT, RevOps
Freeze configuration for go-live, execute the cutover at the agreed time, and communicate what's changed and where to go for help	Enablement, Internal Comms

👉 Outcome: You enter the new year with systems that are "clean enough" to run on, and any remaining issues are known, tracked, and being worked, and not discovered mid-quarter.

Workstream 4: Enable managers & reps

FREE Sales Enablement Cheat Sheet

This is where you make sure the people who carry the number actually understand the plan and know how to run it

Goal

Make the plan usable in the field so that:
- Managers can run their teams week to week using the plan,
- Every rep knows my number, my book, my comp, what's changed,
- Questions and issues surface early instead of turning into quiet frustration

Step	Output
1. Equip managers to run the plan	A manager toolkit (targets, views, talk track, checklists)
2. Give every rep a clear view of their year	A rep "My Year" one-pager rolled out to all sellers/CS
3. Run kickoff & initial comms	A GTM kickoff pack and a short follow-up comms plan
4. Set ongoing enablement & feedback loop	A simple enablement calendar and feedback channel for the field

Step 1: Equip managers to run the plan

Create a light, explicit model that shows how ARR/NRR is built across segments, regions, and motions.

Action	Key partners
Create a one-page team summary per manager (team quota, headcount/ramp plan, territory view, key bets)	Sales leadership, CS leadership
Define the standard views managers should use in 1:1s and team meetings (pipeline, forecast, activity, renewals)	RevOps, Data/BI
Draft a simple manager talk track to explain the plan to their team (what's changing, why, what success looks like)	Enablement, Comms
Share a short "first 30 days" checklist for managers (who to brief, what to check, which reports to use)	Sales leadership

👉 Outcome: Managers have a clear packet they can use to explain the plan, inspect the right numbers, and run their first month of execution with confidence

Step 2: Give every rep a clear view of their year

Make sure each rep can answer, without hunting: What's my world this year?

Action	Key Partners
Design a simple "My Year" template (my quota, my accounts/territory, my comp structure, key plays, key dates)	Enablement, Finance/Comp
Auto-fill as much as possible from systems (quota, accounts, region, manager) and keep only a small number of fields manual	Sales Ops, CS Ops
Ask managers to review and confirm each rep's one-pager with them (in 1:1s or team sessions)	Sales leadership
Store / share these in a predictable place (e.g. CRM link, shared folder) and point reps to it in comms	Enablement, Comms

👉 Outcome: Every rep has a single, current document that explains their year, and managers have used it as a anchor for early conversations

Step 3: Run kickoff & initial comms

Use a short, focused rollout rather than a long, one-off meeting

Action	Key partners
Build a GTM kickoff deck that tells a simple story: targets, focus areas, how we'll win, what's changing for the field	CRO, CMO, CCO
In that deck, point clearly to where reps and managers go for details (manager toolkit, "My Year", rules of engagement, dashboards)	Enablement
Run the main kickoff session (SKO or all-hands) and schedule 1-2 follow-up Q&A sessions with managers and reps	Sales & CS leadership
Publish a short comms plan for the first 30 days (what's being communicated, in which channel, by whom, and when)	Comms, Enablement

👉 Outcome: The field hears a clear, consistent story about the plan, knows where to find details, and has space to ask questions in the first month.

Step 4: Set ongoing enablement & feedback loop

Keep people aligned as hires join, roles change, and issues show up

Action	Key Partners
Create a light enablement calendar for the first 90 days (e.g. 2-3 key sessions: tools, process refresh, key plays)	Enablement
Define how new hires will get up to speed on the plan (which sessions, which docs, which dashboards)	HR, Sales leadership
Set up a simple feedback channel (e.g. form or Slack) for managers and reps to raise GTM issues and questions	Comms, Sales leadership
Review feedback regularly, log patterns, and close the loop with updates or fixes (and say what changed because of their input)	RevOps, Enablement

👉 Outcome: Enablement doesn't stop after kickoff; you have a lightweight, ongoing way to keep people aligned and to catch friction from the field early

Workstream 5: Run your revenue operating rhythm

FREE Revenue Operating Cadence Cheat Sheet

This is where you turn data and plans into regular, disciplined conversations that drive decisions and actions - not just status updates

Goal

Build a simple, reliable rhythm so that:
- Everyone knows what gets discussed when,
- Key decisions don't get lost in side chats,
- You can steer the year with small, regular course-corrections instead of last-minute fire drills

Step	Output
1. Define the forums	A short forum list (purpose, frequency, audience)
2. Design agendas, inputs & outputs	Standard agendas and input packs for each forum
3. Put the rhythm on the calendar	A revenue calendar with dates and owners for the year
4. Track decisions & improve the rhythm	A simple action / decision log and a quarterly rhythm review

Step 1: Define your core forums

Decide which meetings actually matter for running revenue and what each is for

Action	Key partners
List the core GTM forums you will run (e.g. Weekly Pipeline, Weekly Forecast, Monthly Performance Review, Quarterly Business Review)	CRO, Sales leadership
For each forum, write a one-line purpose (e.g. "Resolve risk in current quarter pipeline", "Agree on next quarter focus areas")	RevOps
Set a default frequency and duration (e.g. Weekly 45 mins, Monthly 60 mins, Quarterly 90 mins) for each	RevOps, Exec team
Decide the core audience for each (who must be there vs. optional)	CRO

👉 Outcome: You have a clear list of forums, each with a defined purpose, frequency, and audience

Step 2: Design agendas, inputs & outputs

Make each forum repeatable: same structure, same inputs, clear outputs

Action	Key Partners
For each forum, define a standard agenda (3-5 sections max) that can be reused every time	RevOps, meeting owner
Decide the input views/reports needed for each section (e.g. pipeline by stage, forecast by segment, attainment by team)	Data/BI
Agree on the decisions and outputs expected from each forum (e.g. commit call, focus accounts, hiring changes, budget shifts)	CRO, FP&A
Capture this in a short one-pager per forum ("when it runs, what we look at, what we decide") and share with attendees	Comms

👉 Outcome: Every recurring meeting has a clear structure, the right inputs, and expected outputs - people know why they're there and what they leave with

Step 3: Put the rhythm on the calendar

Turn the design into a visible, predictable schedule

Action	Key partners
Build a revenue calendar for the year that layers the weekly, monthly, and quarterly forums	RevOps
Add all recurring forums to calendars with the right invitees, and attach the forum one-pagers as reference	Executive assistant / Ops
Assign an owner for each forum (usually the CRO, a VP, or RevOps) responsible for the agenda and quality of the discussion	CRO
Make sure key dates (board meetings, budget reviews, major product launches) are visible so forums can feed into them	FP&A, Product

👉 Outcome: Your revenue operating rhythm is visible and real - blocked in calendars, with named owners and clear links to company milestones

Step 4: Track decisions & improve the rhythm

Make sure decisions turn into actions, and the rhythm itself gets better over time

Action	Key Partners
Create a simple action & decision log template (date, forum, decision, owner, due date, status)	RevOps
At the end of each forum, review and confirm who owns what and where actions will be tracked (e.g. Jira, Asana, Sheet)	Meeting owners
Include a 5-minute "meeting health" check once a quarter (what's working, what's noise, what should change in agenda or frequency)	CRO, RevOps
Adjust agendas, inputs, or frequency based on feedback and what the business needs now (e.g. more focus on expansion, less on low-value metrics)	Exec team

👉 Outcome: Important decisions and follow-ups don't get lost, and your operating rhythm stays useful instead of becoming another set of status meetings

Workstream 6: Monitor signals & adjust the plan

Turn the 2025 plan into clear numbers, levers and owners

Goal

Set up a simple way to:
- Spot early signs the plan is off,
- Decide which lever to pull (hiring, pipeline, territories, quotas, spend),
- Make changes in a controlled way that doesn't break trust with managers and reps

Step	Output
1. Choose key signals	A short signal set (leading + lagging metrics)
2. Set thresholds and triggers	A signal → trigger → action guide
3. Agree adjustment levers & process	A simple change playbook (what we can change, when, and how)
4. Plug signals into your rhythm	Signals built into existing forums & dashboards, not extra meetings

Step 1: Choose the key signals

Decide the few numbers that really tell you whether the plan is working

Action	Key partners
List the main questions you want early answers to (e.g. "Are new reps ramping on time?", "Is ENT pipeline building fast enough?", "Is churn stable?")	CRO, FP&A
For each question, pick 1-2 leading metrics (coverage, pipeline build, win rate by segment, activities, CSAT/health, adoption of key tools)	Data/BI
Add a few lagging metrics for confirmation (bookings, NRR/GRR, quota attainment, CAC or productivity per rep)	FP&A, Data/BI
Keep the total signal set small (ideally 8-12 metrics) and write them in plain language	RevOps

👉 Outcome: You have a focused list of leading + lagging metrics that map directly to questions the exec team actually cares about

Step 2: Set thresholds and triggers

Make clear what "good" and "worrying" look like so you're not debating feelings every week

Action	Key Partners
For each key metric, define a target band (what "normal" looks like) using your model and last year's data	FP&A, Data/BI
Define simple triggers (e.g. "If SMB pipeline coverage < 2.5x for 3 weeks", "If new AE ramp < 60% of plan at month 4")	CRO, Sales leadership
Agree on what happens when a trigger is hit (investigate, run a root cause check, propose actions in the next forum)	Exec team
Write this into a short signal → trigger → action table you can reference in operating meetings	RevOps

👉 Outcome: You have clear, agreed rules for when a number is "off enough" to act, rather than arguing about opinions

Step 3: Agree your adjustment levers & process

Decide what you're willing to change, how often, and who approves it

Action	Key partners
List the main levers you can pull: hiring plan, territories, quotas, pipeline programs, pricing/discount guidance, CS coverage	CRO, CCO, CMO, FP&A
For each lever, define: who can propose, who approves, and how often you're willing to touch it (e.g. quotas only between quarters, territories max 1-2 times a year)	CEO, CRO, CFO
Map which signals typically lead to which levers (e.g. pipeline shortfall → demand gen / outbound programs before headcount cuts)	RevOps, FP&A
Capture this as a simple change playbook and align it with HR, Finance, and Legal for anything that touches comp or contracts	HR, Finance, Legal

👉 Outcome: You have a clear, pre-agreed way to adjust course, instead of ad-hoc changes every time someone panics

Step 4: Plug signals and changes into your operating rhythm

Translate the model into concrete team and rep quotas that roll up cleanly to the plan

Action	Key Partners
Add a short "signals snapshot" section to the right forums (e.g. top 5 metrics in Weekly Forecast, deeper dive in Monthly Performance Review)	RevOps, Data/BI
Build a simple signals dashboard that matches your signal set and is used live in those meetings	Data/BI
Use your existing action/decision log (from Workstream 5) to capture triggered actions and follow through	Meeting owners
Once or twice a year, review the signal set and triggers and adjust them based on how useful they've been	Exec team

👉 Outcome: Signals, triggers, and adjustments are part of how you already run the businessno extra ceremonies, just sharper conversations and cleaner decisions

30 - 60 - 90 Day checklists

By day 30 - The machine is running

Area	Target state by day 30
Adoption of new setup	90%+ of new opps use the new stage definitions and ownership rules in CRM.
Quotas & books clarity	100% of reps and managers know their final quota and book (no "still waiting" cases).
Manager enablement	Every frontline manager has run at least one team meeting using the new dashboards / views.
Issues surfaced	You have a single issues log (routing, territories, comp/credit, data) with items tagged by impact and owner.

By day 60 - Breaks fixed, habits forming

Area	Target state by day 60
System friction	All high-impact issues (e.g. major routing gaps, wrong owners, missing quotas) are fixed or have a committed fix date.
Process usage	80%+ of active opps are following the defined lifecycle (no mystery stages, no "stuck" handoffs).
Manager rhythm	80%+ of managers are using the standard pipeline/forecast views in their weekly sessions.
Early signals	You can show trend views for at least 3-5 leading indicators (coverage, pipeline build, early win rate, ramp vs plan) by segment.

By day 90 - Steering, not just stabilising

Area	Target state by day 90
Assumptions vs reality	You've run a Q1 review comparing actuals vs your key assumptions (ramp, win rate, pipeline mix, segment performance) and documented the gaps.
Signal set & triggers	You have a short signal set (≤10 metrics) with clear triggers (e.g. thresholds or trends) agreed with CRO/leadership and used in regular forums.
Controlled adjustments	Any territory / quota / program changes have gone through the agreed change process (documented rationale, approval, and comms), not side deals.
Operating rhythm maturity	Your core revenue forums happen reliably, use standard views, and decisions / actions are logged and followed up

What to measure

FREE Reports & Dashboards Cheat Sheet

Assessing pipeline health

Pipeline Value & Pacing

See how your pipeline value is pacing over time. Drill into opportunities driving those changes by segment, geo, stage, or forecasting categories.

Source: Weflow (getweflow.com)

Pipeline Waterfall

Track how your pipeline changes over time. See what drives those changes like e.g. new opps, amount changes, closed-won/lost or pulled-in/slipped opportunities.

Source: Weflow (getweflow.com)

Forecast vs. Actuals

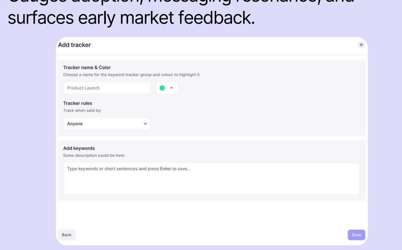
Forecast vs. Actuals is a tactical dashboard that compares predicted revenue (forecast) to actual closed revenue, helping teams measure forecast accuracy and improve future predictions.

Source: Weflow (getweflow.com)

Assessing strategic initiatives

New product launches

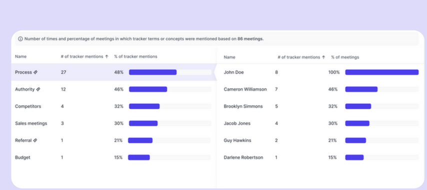
Tracks mentions of recently launched products or features during sales and CS calls. Why it matters: Gauges adoption, messaging resonance, and surfaces early market feedback.



Source: Weflow (getweflow.com)

Objection handling

Tracks how reps respond to common objections (e.g., price, timing, fit). Why it matters: Reveals rep skill, buyer hesitation points, and coaching opportunities to improve deal conversion.



Source: Weflow (getweflow.com)