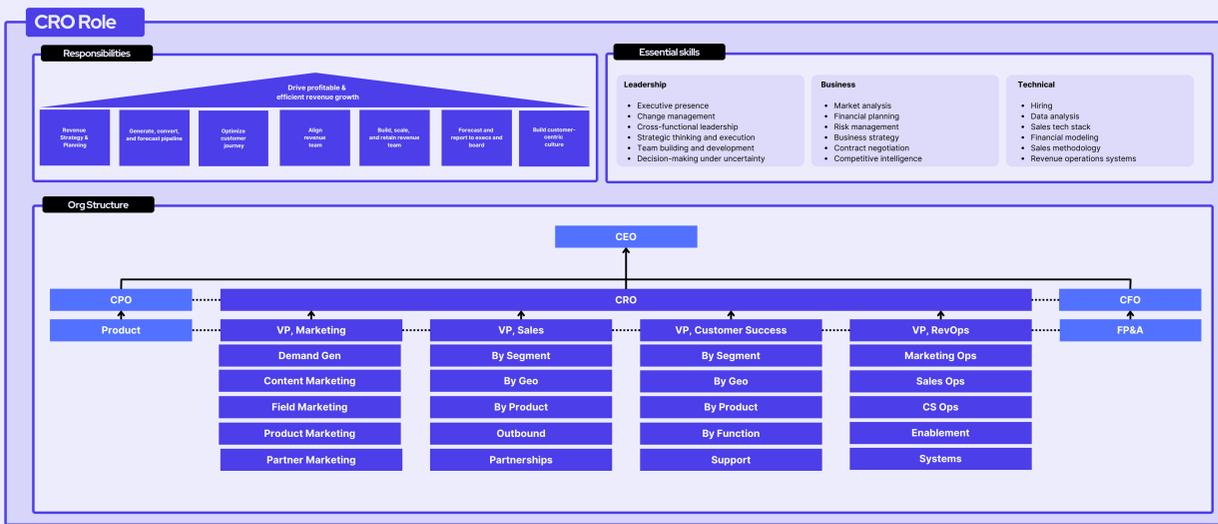
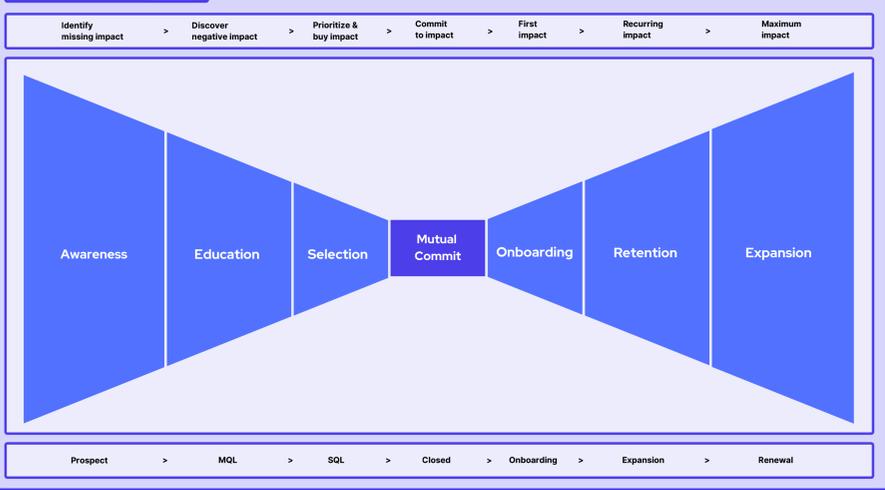


# Chief Revenue Officer Cheat Sheet

## CRO Foundations



## Bowtie Model



## GTM Strategy

### Strategy & Investments

Strategy	Characteristics	Key Components	Investment Areas	Success Metrics
Enterprise	High ACV (\$100K+), Complex sales cycles (6+ months), Multiple stakeholders, Heavy customization needs, High-touch implementation	Enterprise sales team structure, Enterprise AEs, Solutions Engineers, Professional Services, Customer Success	Field sales presence, Solutions engineering, Security/compliance, Enterprise features, Professional services revenue, Executive relationships	Deal size growth, Enterprise logo acquisition, Security certification completion, Professional services revenue, Reference customers
Mid-Market	Medium ACV (\$25K-100K), Moderate sales cycle (2-4 months), Standardized solution, Mix of high-touch and tech-touch	Inside sales team, Light solutions engineering, Standardized onboarding, Scaled customer success	Sales development, Partner enablement, Product standardization, Self-serve resources, Automated onboarding	Sales cycle length, CAC payback, Win rate, GRM & NRR, Product usage
Product-Led Growth	Lower initial ACV, Self-service capabilities, Rapid time-to-value, Expansion potential, Virality features	Product analytics, Self-service capabilities, Sales assist team, Usage-based pricing, In-product education	Product experience, Self-service flows, Viral mechanisms, Usage analytics, Automated expansion	Time to first value, Product activation rate, Expansion revenue, GRM & NRR, User engagement
Partner-Led	Leveraged sales motion, Geographic expansion, Industry specialization, Shared economics	Partner programs, Channel sales team, Partner enablement, Co-marketing, Deal registration	Partner portal, Training programs, Marketing resources, Channel operations, Partner support	Partner-sourced revenue, Partner satisfaction, Channel conflict rate, Partner program ROI, Geographic coverage
Hybrid Strategy	Multiple GTM motions, Segment-specific approaches, Flexible deployment, Diverse revenue streams	Segmented teams, Multi-modal operations, Flexible pricing, Diverse marketing	Segment operations, Team coordination, Systems integration, Cross-functional processes, Analytics/distribution	Segment performance, Motion efficiency, Resource allocation, Cross-functional processes, Blended growth rate

## Metrics to Track

### Financial metrics

Category	Metric	Definition	Benchmark
Growth metrics	Annual Recurring Revenue (ARR)	The normalized annual value of all active subscriptions, including term subscriptions and consumption-based subscriptions. Excludes one-time fees, professional services, and other non-recurring revenue.	Seed: \$0.2-1M; Series A: \$1-5M; Series B: \$5-20M; Growth: \$20M+; Target growth rates vary by stage
	Monthly Recurring Revenue (MRR)	The predictable monthly revenue generated from all active subscriptions. Calculated as the sum of all recurring charges from paying customers. ARR divided by 12.	Consistent monthly growth of 10-15% for early-stage; 5-7% for growth stage
	Year-over-Year (YoY) Growth Rate	The percentage change in a metric (typically revenue) compared to the same period in the previous year. Calculated as: ((Current Period - Prior Period) / Prior Period) * 100	Early-stage: 3x+ 3x 2x+2x; Growth: 40-100%; Scale: 200-40%; Public SaaS median: ~30%
	Quarter-over-Quarter (QoQ) Growth Rate	The percentage change in a metric compared to the previous quarter. Calculated as: ((Current Quarter - Previous Quarter) / Previous Quarter) * 100	Early-stage: 15-25%; Growth: 10-15%; Scale: 5-10%
Financial health metrics	Burn Rate	The rate at which a company spends its cash reserves. Monthly burn rate is the net amount of cash spent each month. Net Burn = Operating expenses - Revenue	Should not exceed 1/12 of total funding round; Burn multiple (Net burn/ net ARR) should be <1.5
	Runway	The amount of time remaining before a company runs out of cash at the current burn rate. Calculated as: Current Cash Balance / Monthly Burn Rate	Minimum: 12 months; Ideal: 18-24 months; During market uncertainty: 24-36 months
	Cash Conversion Cycle	The time it takes to convert resource inputs into cash flows from sales. In SaaS, typically measured as the time between paying for customer acquisition and collecting payment from customers	Annual contracts paid upfront: Negative CCC; Monthly payments: 30-60 days; Enterprise: 60-90 days
	Gross Margins	The percentage of revenue remaining after accounting for direct costs of delivering the service. Calculated as: ((Revenue - Cost of Goods Sold) / Revenue) * 100	Infrastructure SaaS: 65-75%; Pure SaaS: 80-85%; Best-in-class: >85%
Operational metrics	Operating Expenses Ratio	Total operating expenses as a percentage of revenue. Calculated as: (Total Operating Expenses / Revenue) * 100	Early-stage: 150-200% of revenue; Mid-market: 100-150%; Scale: 60-80%; Mature: 40-60%
	Logo Growth Rate	The net increase in total number of paying customers over a period. Calculated as: ((End of Period Customers - Start of Period Customers) / Start of Period Customers) * 100	Early-stage: >10% monthly; Growth: 3-5% monthly; Enterprise: 1-2% monthly

### Investor metrics

Metric	Definition	Benchmark
Rule of 40	Combined metric of growth and profitability that should be > 40%. Calculated as: YoY Revenue Growth Rate + EBITDA Margin	Minimum target >40%; Good: 40-60%; Excellent: >60%; Early-stage focuses on growth component; Later-stage balances both
Magic Number	Measures sales efficiency - the revenue generated for each dollar spent on sales and marketing. Calculated as: Net New ARR / Previous Quarter's Sales & Marketing Spend	Minimum viable: <0.75; Good: 1.0-1.5; Excellent: >1.5; Below 0.75 indicates inefficient spending
CAC Payback Period (Months)	The time it takes to recover the cost of acquiring a customer from their gross margin-adjusted revenue. Calculated as: CAC / (ARPA * Gross Margin), where ARPA is Average Revenue Per Account	SMB: 6-12 months; Mid-market: 12-18 months; Enterprise: 18-24 months; Best-in-class: <12 months
LTV/CAC Ratio	The ratio between customer lifetime value and customer acquisition cost. Calculated as: LTV / CAC	Minimum viable: 3:1; Good: 4:1; Excellent: >5:1; Concerning if <3:1
Net Dollar Retention	Measures revenue growth from existing customers, including expansions, contractions, and churn. Calculated as: (Beginning MRR + Expansions - Contractions - Churn) / Beginning MRR * 100	SMB: 90-100%; Mid-market: 100-110%; Enterprise: >120%; Top performers: >150%; Concerning if <100%
Gross Dollar Retention	Percentage of recurring revenue retained from existing customers, excluding expansions	Good: >85%; Best-in-class: >95%
Burn Multiple	Measures efficiency in spending to grow revenue. Calculated as: Net Burn / Net New ARR	<1.5x is great; >2x is concerning
Free Cash Flow (FCF) Margin (%)	Indicates how much cash a company generates after expenses. Calculated as: (Operating Cash Flow - CapEx) / Revenue * 100	Median for startups < 2.5M in ARR: ~30%; Median for public SaaS cos: 10%
EBITDA Margin (%)	Investors use this to measure profitability before accounting for financing costs. Calculated as: (EBITDA / Revenue) * 100	Median for public SaaS (2024): 6%; Strong: 20-30%

## Common Challenges to \$100M ARR

Challenges	Solutions
Pipeline coverage low	Shift investment in pipeline generation, Improve conversion rate from MQL to SQO, Test new channels or markets
Low win rates	Improve discovery process, Improve objection handling, Improve product competitiveness
Low quota attainment	Improve hiring and onboarding, Invest in training & enablement, Take out low performers
Inconsistent deal quality and poor pipeline visibility	Automate CRM data capture, Implement strict qualification criteria, Regular pipeline reviews & inspections

## Marketing metrics

Metric	Definition	Benchmark
MQL to SQL Conversion Rate	Percentage of MQLs that convert to SQLs	B2B SaaS: 15-30%
Cost per MQL	Total marketing spend divided by number of MQLs generated	B2B average: \$30-\$100
MQL Growth Rate	Month-over-month or year-over-year growth in MQL volume	Healthy growth: 10-20% YoY
Lead Scoring Effectiveness	Percentage of MQLs that meet minimum scoring thresholds based on demographic and behavioral criteria	Good: >60% of MQLs should convert to SQLs (Sales Accepted Leads)
MQL Response Time	Average time taken to respond to new MQLs	Best practice: <1 hour
Unique Visitors	Number of distinct individuals visiting your website in a given period	Varies by company size; Growth rate more important than absolute numbers
Time on Site	Average duration visitors spend on your website	Good: >2-3 minutes; Excellent: >4 minutes
Bounce Rate	Percentage of visitors who leave after viewing only one page	B2B websites: 40-60%; Lower is better
Conversion Rate (Visitors to Leads)	Percentage of visitors who complete a desired action (form fill, sign-up, etc.)	B2B websites: 2-5%; Top performers: >5%
Traffic Sources Distribution	Breakdown of traffic by source (organic, paid, direct, referral, social)	Healthy mix: Organic: 40-50%; Direct: 15-25%; Paid: 15-25%; Referral: 10-15%; Social: 5-10%
Cost per Click (CPC)	Average cost paid per click for paid advertising	B2B SaaS: Google Ads: \$2-\$7; LinkedIn: \$5-\$15; Facebook: \$1-\$3
Cost per Acquisition (CPA)	Total marketing cost divided by number of acquisitions	B2B SaaS: SMB: \$100-\$500; Mid-market: \$500-\$2,000; Enterprise: \$2,000-\$10,000+

## Sales metrics

Metric	Definition	Benchmark
Pipeline Coverage Ratio	Total value of opportunities in pipeline divided by revenue target for the period. Shows if there's enough pipeline to hit targets.	3-4x for enterprise sales; 5-6x for mid-market; Higher ratios needed for longer sales cycles
Pipeline Velocity	Rate at which opportunities move through your sales pipeline. Calculated as: (Number of Deals * Average Deal Size * Win Rate) / Sales Cycle Length	Varies by deal size; but healthy pipelines show consistent movement with <20% of deals being stagnant
Average Deal Size	Total revenue from closed-won deals divided by number of deals in a given period	Varies widely by market segment: SMB: \$1K-10K; Mid-market: \$10K-100K; Enterprise: \$100K+
Win Rate	Percentage of opportunities that result in closed-won deals. Calculated as: (Won Deals / Total Closed Deals) * 100	B2B SaaS: 20-30% overall; Top performers: >35%; Enterprise deals: 15-25%
Sales Cycle Length	Average time from first meaningful contact to deal closure	SMB: 1-3 months; Mid-market: 3-6 months; Enterprise: 6-12+ months
SQL Conversion Rate	Percentage of Sales Qualified Leads that convert to customers	20-30% for well-qualified leads; Top performers: >35%
Customer Acquisition Cost (CAC)	Total sales and marketing spend divided by number of new customers acquired in a period	Should be recovered within 12 months; Typically \$1K-\$10K for SMB; \$10K-\$50K+ for enterprise
Sales Productivity Ramp Time	Time required for new sales reps to reach full productivity (usually defined as achieving quota)	SDBs: 3-4 months; AEs: 6-9 months; Enterprise AEs: 9-12 months
Sales Capacity Utilization	Percentage of available selling time spent on revenue-generating activities	Top performers: >40% of time on selling activities; Industry average: 35-45%
Quote to Close Ratio	Percentage of quotes/proposals that convert to closed-won deals	B2B SaaS average: 20-30%; Top performers: >40%
Sales Activity Metrics	Key activity metrics tracked per rep: Calls per day; Emails sent; Meetings scheduled; Active opportunities managed	Daily targets: Calls: 30-50 (SDBs), 15-20 (AEs); Emails: 50-75 (SDBs), 20-30 (AEs); Meetings: 2-3 per day (AEs); Active opportunities: 15-30 (varies by deal size)

## Customer Success metrics

Metric	Definition	Benchmark
Time to First Value	Time between customer purchase and achieving their first significant value milestone	SMB: Days to weeks; Enterprise: 1-3 months; Faster is better
Product Adoption Rate	Percentage of purchased features/modules actively used by customers	Good: >60%; Best-in-class: >80%
Feature Usage Metrics	Frequency and depth of feature utilization by customers	Core features: Used by >80% of customers; Secondary features: >40%
Net Promoter Score (NPS)	Measures customer loyalty based on likelihood to recommend on a scale of 0-10. Calculated as: % Promoters (9-10) minus % Detractors (0-6)	B2B SaaS: 30-40; Top performers: >50
Customer Satisfaction Score (CSAT)	Measures satisfaction with specific interactions on a scale of 1-5 or 1-10	B2B SaaS: 75-85%; Top performers: >90%
Support Ticket Volume	Number of support tickets per customer per month	Varies by product complexity; Healthy: <2 tickets per customer per month
Support Resolution Time	Average time to resolve customer support tickets	First response: <4 hours; Resolution time: <24 hours
Customer Churn Rate	Percentage of customers that cancel or don't renew in a given period	SMB: 3-5% monthly; Enterprise: <1% monthly; Best-in-class: <3% annually
Revenue Churn Rate	Percentage of recurring revenue lost from existing customers	SMB: 5-7% monthly; Enterprise: <5% annually; Negative churn is ideal
Net Revenue Retention (NRR)	Total revenue from existing customers including expansions, minus churn and contractions	Good: >100%; Great: >110%; Best-in-class: >120%
Gross Revenue Retention (GRR)	Percentage of recurring revenue retained from existing customers, excluding expansions	Good: >85%; Great: >90%; Best-in-class: >95%
Customer Lifetime Value (CLV)	Predicted total revenue from a customer over the entire relationship	Should be 3x-5x CAC; Higher ratios indicate better unit economics
Expansion Revenue	Additional revenue generated from existing customers through upsells, cross-sells, or usage increases	Should represent 20-30% of total revenue; Best-in-class: >40%

## CRO 2026 Priorities

### Implement AI in GTM

FREE GTM AI Cheat Sheet

#### Core Principles

Define ICP tiers, stage exits, SLAs, and owner maps first - then configure tools to enforce them (block stage change without next step/sign, auto-task on SLA breach)

#### Explainability > black box

Every score/rating shows top reasons and a short "why now". Keep a single model notes page (inputs, thresholds, return cadence) so managers can coach.

#### Human-in-the-loop

All proposals, humans approve. Use confidence thresholds and give-gate rules; route low-confidence/high-risk changes to a review queue with audit trail.

#### Snapshot & audit weekly

Take weekly snapshots of stages/commitment, run reviews by deltas; log threshold/outcome/notes changes; use them to inform, variance, and TV trends.

#### What to implement

Expansion	Retention	Onboarding	Mutual Commit	Selection	Education	Awareness
Spot ICP lookalikes, read real buying signals, and rank accounts based on budget and SDR time to go to the highest return targets - keeping pipeline coverage on track	Turn interested accounts into live conversations by responding fast, routing to the right owner, and sending on-brand, persona-aware messages that convert to meetings and qualified pipeline	Run crisp discovery, capture qualification the same way every time, and surface early risks so managers can coach and reps know the next best move - moving real deals forward faster	Use AI to keep late-stage risks visible, proactively identify and move high-risk deals forward, so deals close when promised and the forecast is reliable	Transfer context clearly from Sales, stand in a shared success plan, and remove blockers fast so customers hit first value on time	Use AI to spot risk early, trigger the right alert and keep executive alignment strong - so upsell/cross-sell and retention stays high	Use AI to spot expansion-ready customers, trigger the right plays at the right time, and keep exec alignment strong - so upsell/cross-sell and retention stays high

### Strengthen forecasting

FREE Revenue Planning and Forecasts Cheat Sheet

#### Why it should be a top priority

Forecast misses kill trust and make every budget ask harder. Boards care less about "top of funnel volume" and more about efficient, predictable growth

#### Investors

Forecast misses kill trust and make every budget ask harder. Boards care less about "top of funnel volume" and more about efficient, predictable growth

#### Multi-product, PLG + sales-led, partner, and enterprise motions all flowing into the same number. Without a light process, the roll-up becomes guesswork

#### AI adds signals and noise

All tools surface risk, intent, and health - but without clear rules and data hygiene, they just create more dashboards and confusion

#### Macro volatility

Longer sales cycles, more approvals, and tighter budgets mean small shifts in win rate or cycle time can blow up the quarter. Strong forecasting lets you react early, not at all

#### What CROs should focus on

**Use the forecast as the bridge between strategy & execution**

Connect strategy to numbers: For each strategic bet (new segment, new product, new region), ensure there's an explicit pipeline and forecast tied to it.

Run the pipeline on occasion: Operate with at least three views: Base, Upside, and Downside. Decide if/when actions you'll take in each case.

Coach through real deals: Pick a few strategic deals each week and use them to coach on qualification, multitasking, and next steps.

Forecast like: Start with one forecast type and keep it simple at first. At some point, most advanced companies use all three forecasting methods to drive higher predictability and forecast accuracy.

**Make forecast reviews a leadership and coaching moment**

Start with patterns, not totals: Use forecast reviews to spot where deals stall, where win rates drop, and where cycles stretch - then decide how to respond.

Ask "What is AI seeing that we aren't?": Use AI to highlight risky deals, slipping deals, and reveal risk, then dig into why the new cycles stretch - then decide how to respond.

Compare AI vs. human calls regularly: Review AI forecast vs. sales forecast vs. actuals and use the gaps to improve both judgment and model settings.

**Treat AI as a second opinion, not the single source of truth**

Build a culture of honest pipeline

Sanitize surprise misses: Set the expectation that misses can happen, but surprise misses are not acceptable; talk openly about where risk is building.

Reward realism over optimism: Recognize leaders who call risk early and adjust plans, not those who hold inflated numbers until the last week.

### Adapt to evolving buying behaviour

Why it should be a top priority

Deals are dying in internal alignment

Legal, security and finance are now your real competitors. If your motion doesn't help champions get their own team to yes, even great deals quickly stall out

Best customers want to buy on their terms

The same account may start self-serve, ask for a heavy demo, then move to procurement. If you can't flex between low-touch and high-touch, you'll lose to vendors who can

Buying groups keep growing

You've got more stakeholders per deal and the same number of reps. Without a deliberate multi-threading plan, you're betting quarters on a single champion

#### What CROs should focus on

Longer, more complex buying cycles

Redesign stages around how budgets really get approved: Anchor your funnel on real buyer milestones (problem agreed, sponsor secured, CRO looped in, security cleared, not just "discovery" / "demo" / "proposal" - so your forecast reflects actual buying momentum)

Multi-threading & consensus selling

Treat missing stakeholders as a forecast risk, not a sales suggestion: For material deals, define the minimum buying group (champion, economic buyer, technical, and user) and have leaders track gaps here the same way they track weak pipeline coverage.

Self-serve and low-touch alongside high-touch

Design a portfolio of motions, not one "average" journey: Decide which signers and deal sizes you want to close fully self-serve, which you want sales-led, and which must be high-touch - then sign goals, SLAs, and expectations to that design.

#### Signals you're out of sync with your buyers

High interest, low movement

You see strong top-of-funnel, but deals stall once more stakeholders get involved

Champion can't get it done internally

You keep hearing "everyone loves it, timing is right" or "we'll move next quarter" from well-intentioned champions who don't have the political capital to push it through.

Self-serve and sales fight each other

Prospects bounce between trial, onboarding, and outbound with different messages, pricing, and owners - and no one can clearly explain who should handle which path.

Win stories don't match sales playbook

When you dig into recent wins, they closed in ways your current stages, content, and roles don't actually support (e.g. product-led start, buyer-driven business case, late-stage exec swim)

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