



# 13

## Salesforce Reports That Matter

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A guide for tech executives

Your team can build hundreds of reports.  
Most of them don't matter.

These 13 are the ones that come up in board  
meetings, QBRs, and forecast calls.  
Build these first. Build them right.

# Reports are only as good as the data behind them

Before your team builds a single report from this guide, make sure the data underneath is clean. These are the five most common data problems we see in B2B SaaS companies between \$3M and \$100M — and every one of them makes your reports lie to you.

*“If your team argues about what a number means, you don’t have a reporting problem — you have a data problem.”*

## Fix these before you build anything

- 1 Duplicate fields.**  
ARR and Annual Recurring Revenue — same metric, two fields. Some reports pull one, some pull the other. The numbers never match and nobody knows which is the source of truth.
- 2 No deal type separation.**  
New Business, Expansion, and Renewal all live in one opportunity bucket. When the board asks what’s driving growth, nobody can answer cleanly.
- 3 Undefined “Closed Won.”**  
Sales says it means contract signed. Finance says it means payment received. CS says it means handoff complete. Until this is standardized, revenue reports will never agree.
- 4 Free text where picklists belong.**  
“Lost to Competitor” and “competitor won” and “lost - competitor” are three separate filter values. Reporting breaks silently because nobody catches the variations.
- 5 Close dates that drift.**  
Reps push close dates forward every month instead of updating the stage. Pipeline reports look healthy. Velocity metrics look normal. Neither is true.

## How to use this guide

Each report has two halves. The top is for you — the business impact, what it looks like, and what breaks without it. The bottom is a build spec you can hand directly to your RevOps team or Salesforce admin.

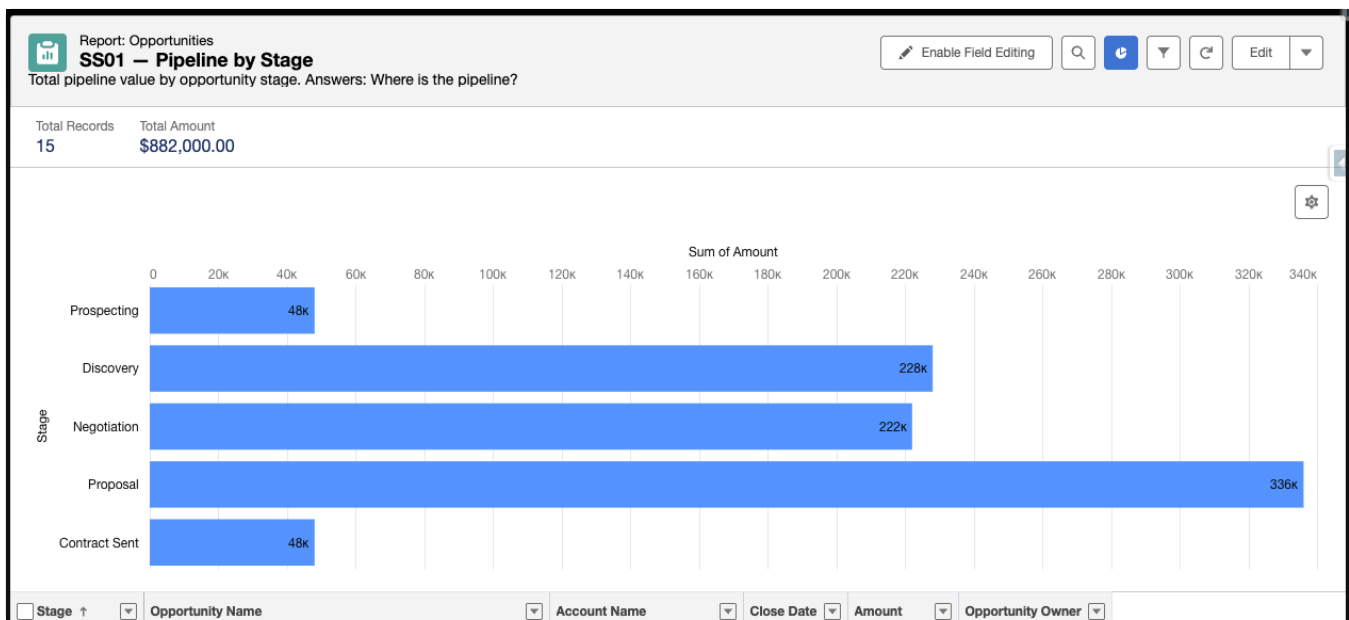
# Pipeline by stage

“Where’s the pipeline?”

Requested by: CRO / VP Sales

KPI: Pipeline coverage ratio

If you can’t see pipeline by stage in real time, you’re forecasting from gut feel. This report shows total pipeline value broken out by stage with expected close dates — giving you real-time visibility into how much revenue is in play and where it sits. Most B2B SaaS companies need 3x–4x pipeline coverage to hit their number reliably.



## If this report doesn't exist:

Forecast calls become a guessing game. Reps report confidence with no data. You find out you're light on pipeline in the last two weeks of the quarter — when there's no time to generate more.

## Build spec

Report type: Summary • Object: Opportunities • Filters: Stage ≠ Closed Lost, Stage ≠ Closed Won, Close Date = THIS QUARTER • Group by: Stage > Owner • Summarize: Sum of Amount • Chart: Horizontal bar

# Forecast vs. actuals

“Are we going to hit the number?”

Requested by: CEO / CFO / Board

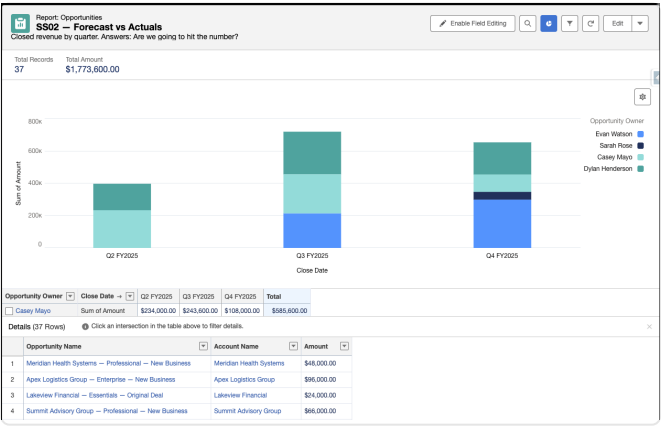
KPI: Forecast accuracy

This is the report your board cares about most. It compares what your team committed to delivering against what actually closed. Forecast accuracy is one of the clearest indicators of operational maturity — companies that consistently forecast within 10% of actuals signal to investors that they understand their business.

Forecast view

Months	Quota	Closed Only	Commit Forecast	Best Case Forecast
Total: 12 Months	\$1,200,000	\$345,000	\$760,000	\$1,100,000
January FY 2026	\$100,000	\$30,000	\$70,000	\$95,000
February FY 2026	\$100,000	\$35,000	\$72,000	\$98,000
March FY 2026	\$100,000	\$38,000	\$75,000	\$100,000
April FY 2026 <i>Current</i>	\$100,000	\$40,000	\$78,000	\$102,000
May FY 2026	\$100,000	\$28,000	\$65,000	\$90,000
June FY 2026	\$100,000	\$25,000	\$60,000	\$88,000
July FY 2026	\$100,000	\$22,000	\$58,000	\$85,000
August FY 2026	\$100,000	\$20,000	\$50,000	\$80,000
September FY 2026	\$100,000	\$23,000	\$58,000	\$86,000

Actuals view



**If this report doesn't exist:** Finance builds their own forecast in a spreadsheet because they don't trust CRM data. You present a different number to the board every quarter and can't explain why it changed. Planning decisions are based on gut feel instead of predictable revenue.

**Build spec**  
Report type: Summary (or Matrix) • Object: Opportunities (Closed Won) • Filters: Close Date = LAST 4 QUARTERS • Group by: Close Date (quarter) > Owner • Summarize: Sum of Amount • Chart: Grouped vertical column — forecast vs. actuals

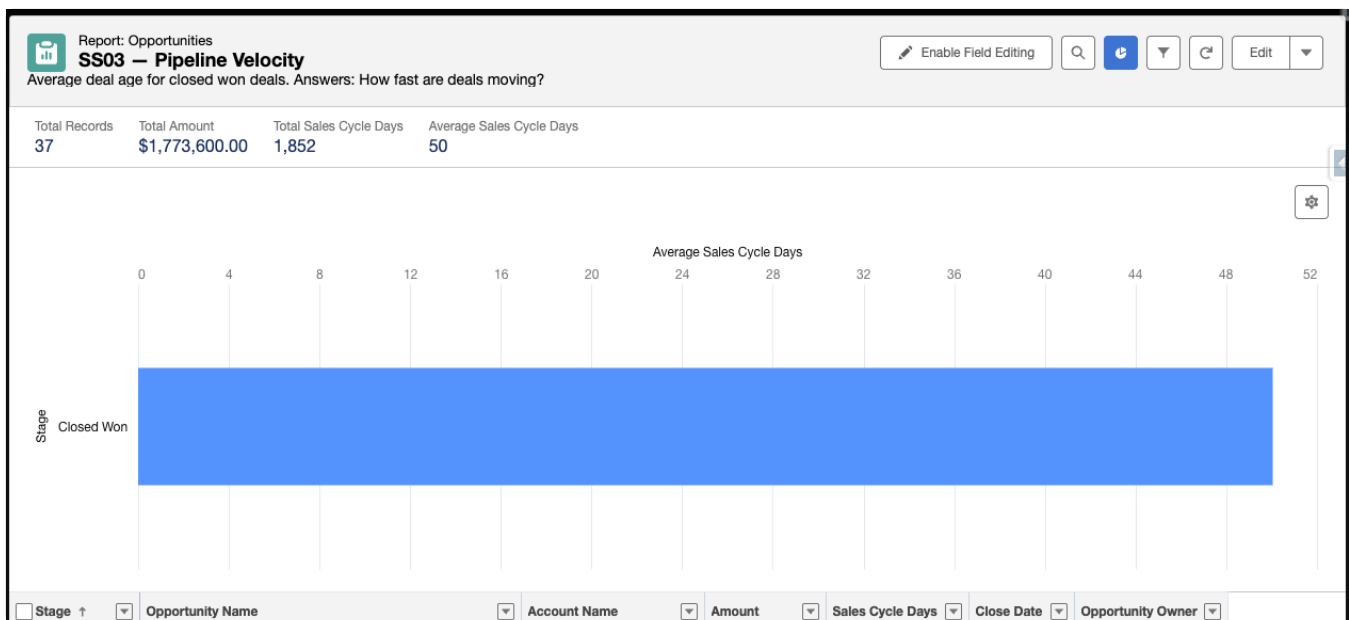
# Pipeline velocity

“How fast are deals moving?”

Requested by: CRO / VP Sales

KPI: Avg days in stage, sales cycle length

Pipeline velocity tells you how long deals take to move through your funnel and where they stall. If your average sales cycle is 45 days but deals sit in Negotiation for 22 of those days, you’ve found the bottleneck. This report is critical for accurate forecasting — it tells you whether deals in your pipeline today will actually close this quarter.



### If this report doesn't exist:

You can't predict when deals will close because you don't know how long they typically take. Reps sit in the same stage for months with no accountability. Your forecast includes deals that mathematically can't close in the time remaining.

### Build spec

Report type: Summary • Object: Opportunities (Closed Won, last 6 months) • Filters: Stage = Closed Won, Close Date = LAST 6 MONTHS • Group by: Stage • Summarize: Avg of Age, Record Count • Chart: Horizontal bar by stage • Note: Requires Field History Tracking on Stage field

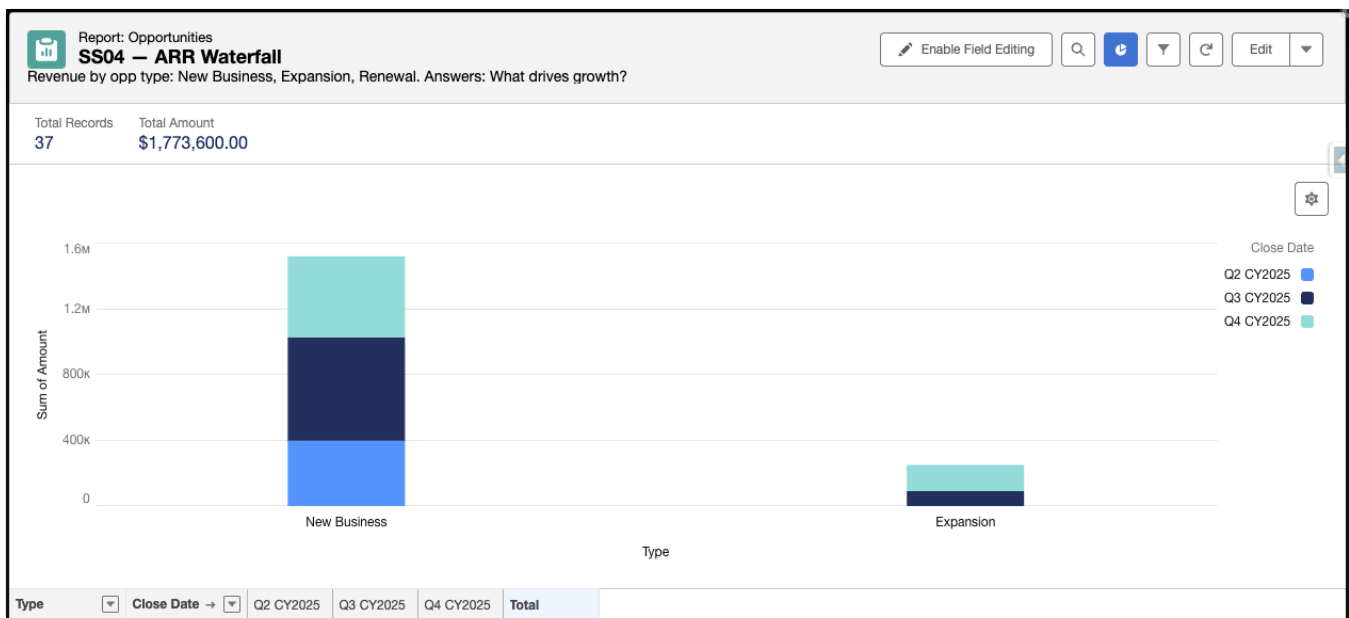
# ARR waterfall

“What’s our net new revenue picture?”

Requested by: CEO / CFO / Board

KPI: Net new ARR (New + Expansion – Churn)

This is the single most important financial report for a SaaS company. It breaks your revenue into three buckets: new business, expansion, and churn. Most companies at the \$3M–\$25M stage only track total revenue but can’t explain what’s driving it. If your team hasn’t defined what counts as New Business versus Expansion versus Renewal at the opportunity level, this report is impossible to build accurately.



### If this report doesn't exist:

You can't tell the board what's driving growth. Marketing claims the new logos, Sales claims the expansions, and nobody owns churn. Strategic decisions are made without knowing which revenue motion is actually working.

### Build spec

Report type: Matrix • Object: Opportunities (Closed Won) • Filters: Stage = Closed Won, Close Date = THIS QUARTER • Group by: Type (New Business / Expansion / Renewal) > Close Date (month) • Summarize: Sum of ARR • Chart: Stacked vertical column • Note: Requires clean Type picklist with standardized values

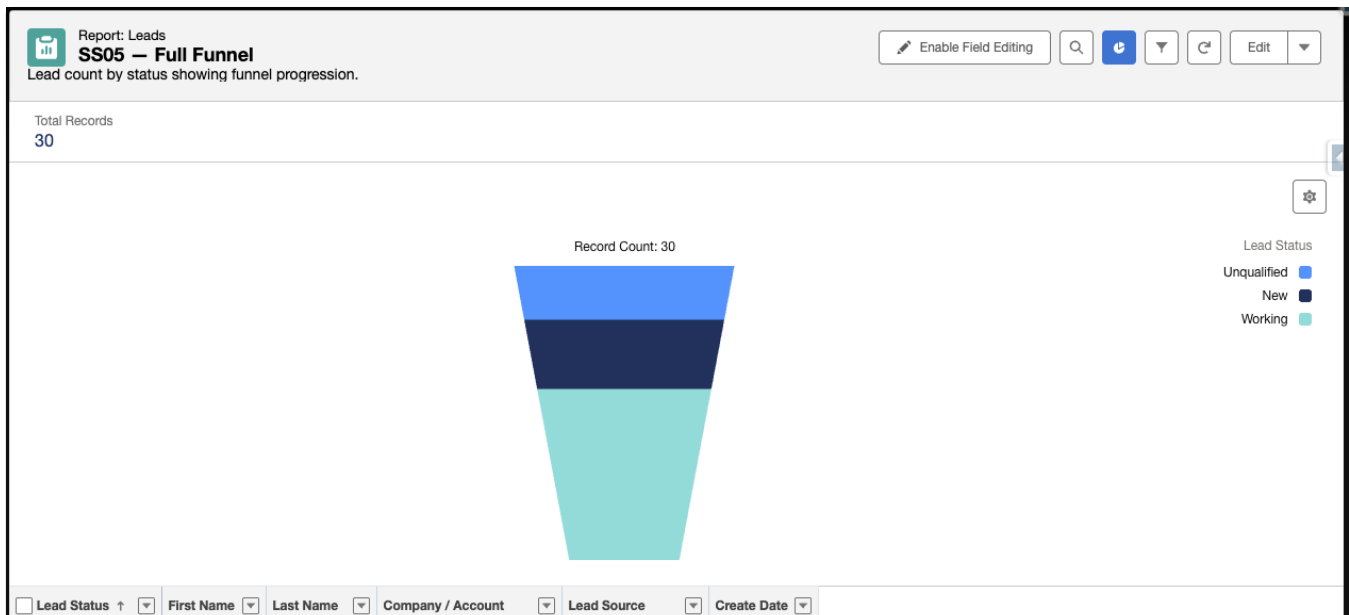
# Full funnel conversion

“Are leads turning into revenue?”

Requested by: CRO / CMO

KPI: Stage-to-stage conversion rates

This report shows where your funnel leaks. It tracks how many leads enter at the top, how many convert at each stage, and how many become customers. If you generate 500 MQLs per month and only 10 become customers, the 2% overall conversion rate alone isn't useful. What's useful is knowing that 40% of MQLs convert to SQLs but only 5% of SQLs convert to SQOs. The bottleneck is in qualification, not lead generation.



## If this report doesn't exist:

Marketing and Sales blame each other constantly because there's no shared view of the funnel. You invest in lead generation when the real problem is conversion. Every team has their own spreadsheet and none of the numbers match.

## Build spec

Report type: Summary • Object: Leads and Opportunities • Filters: Created Date = THIS QUARTER • Group by: Lead Status / Opportunity Stage • Summarize: Record Count per stage • Chart: Funnel or horizontal bars • Note: Requires consistent Lead-to-Opportunity conversion process

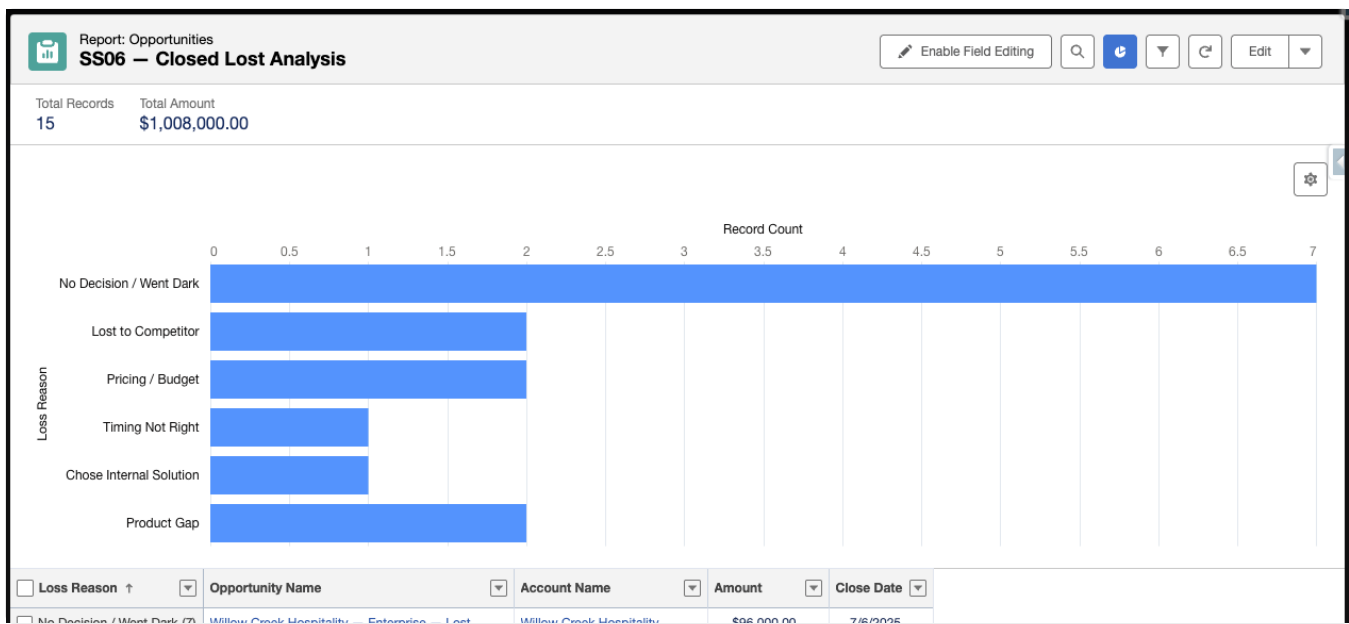
# Closed lost analysis

“Why are we losing deals?”

Requested by: VP Sales / CRO

KPI: Win rate, loss reason distribution

Winning more deals starts with understanding why you're losing them. This report breaks down every Closed Lost opportunity by reason. The pattern is where the value lives. If 40% of your losses are No Decision, that's a different problem than if 40% are Lost to Competitor. This is also one of the most commonly broken reports because Loss Reason is often a free text field instead of a standardized picklist.



## If this report doesn't exist:

You lose deals and learn nothing from it. The same objections come up over and over and nobody tracks the pattern. Product and marketing can't adjust positioning because they don't know what's actually causing losses.

### Build spec

Report type: Summary • Object: Opportunities (Closed Lost) • Filters: Stage = Closed Lost, Close Date = LAST 6 MONTHS • Group by: Loss Reason > Stage at Time of Loss • Summarize: Record Count, Sum of Amount • Chart: Horizontal bar ranked by frequency • Note: Loss Reason must be a required picklist, not free text

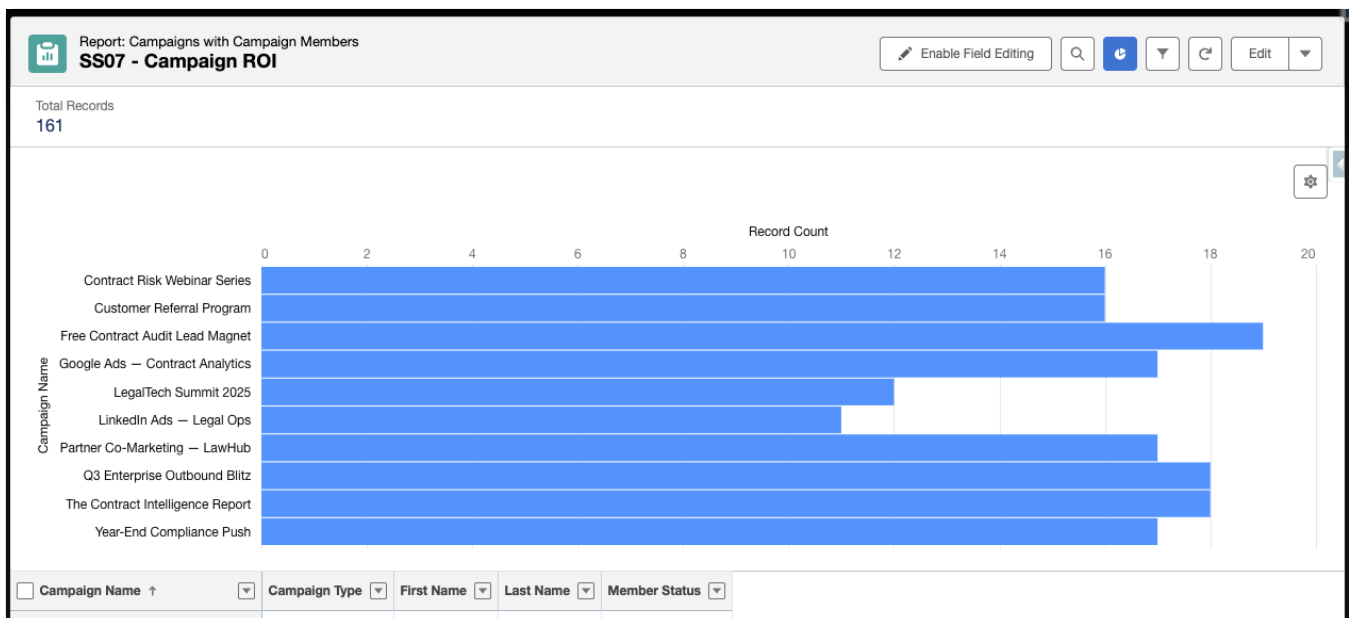
# Campaign attribution

“Which campaigns actually work?”

Requested by: CMO / CEO

KPI: CPA, pipeline influenced, revenue attributed

Your marketing team is spending money across paid ads, events, content, and outbound. This report tells you which of those investments are generating pipeline and revenue. Most SaaS companies in the \$3M–\$50M range measure marketing in vanity metrics. The exec team needs to know: how much did we spend, how much pipeline did it create, and how much revenue did it close?



## If this report doesn't exist:

Marketing can't prove ROI beyond lead counts. Budget conversations become political instead of data-driven. When cuts need to happen, you cut evenly instead of surgically removing what's underperforming.

## Build spec

Report type: Summary • Object: Campaigns with Opportunities (via Campaign Influence) • Filters: Campaign Start Date = THIS YEAR • Group by: Campaign Name > Campaign Type • Summarize: Sum of Amount, Record Count • Chart: Horizontal bar by campaign • Note: Requires Campaign Members linked to Opportunities

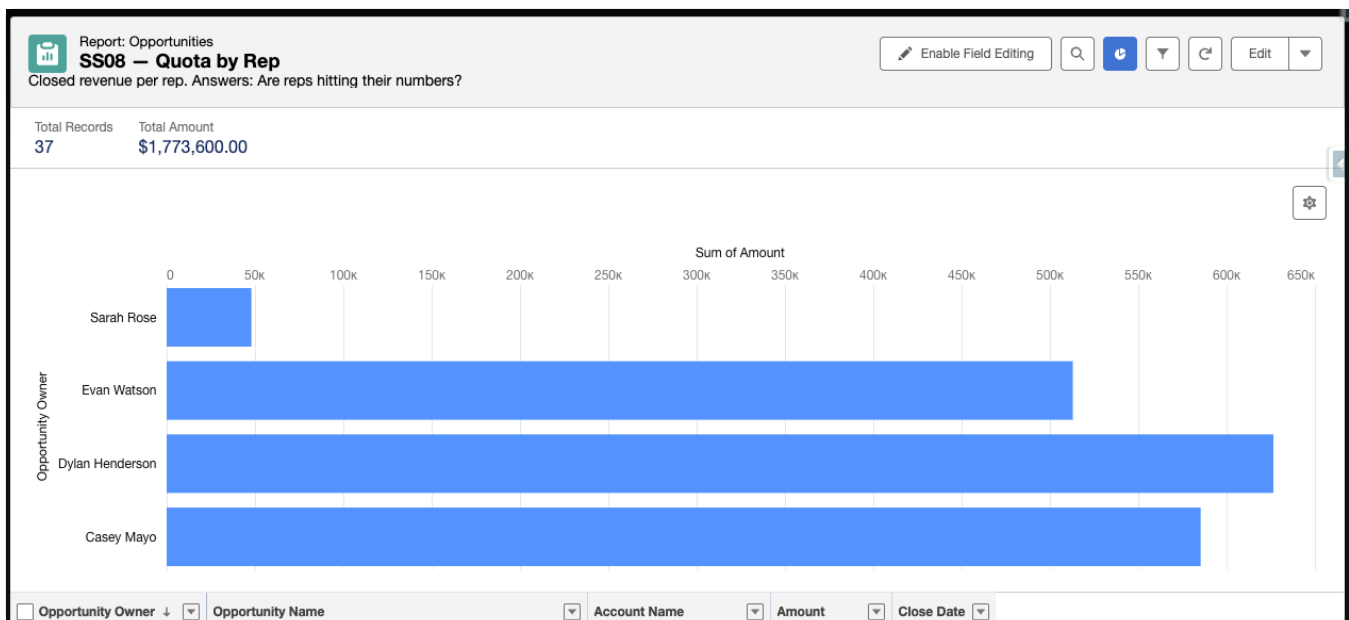
# Quota attainment by rep

“Are reps hitting their numbers?”

Requested by: VP Sales / CRO

KPI: Quota attainment %, revenue per rep

This report shows each rep’s closed revenue against their assigned quota. The real value isn’t in identifying top and bottom performers — it’s in spotting trends. A rep who hit 120% last quarter and is tracking toward 70% this quarter has a problem that needs attention now. This is also the report that keeps quota-setting honest. If 80% of your team misses quota every quarter, the quotas are wrong.



## If this report doesn't exist:

You don't know who's actually performing until the quarter is over. Quota conversations happen on vibes instead of data. Underperformers hide behind team averages. You can't identify whether you have a hiring, training, or territory problem.

## Build spec

Report type: Matrix • Object: Opportunities (Closed Won) • Filters: Stage = Closed Won, Close Date = THIS QUARTER • Group by: Owner (rows) > Close Date by Month (columns) • Summarize: Sum of Amount • Chart: Horizontal bar per rep with quota reference line • Note: Requires quota data in Salesforce

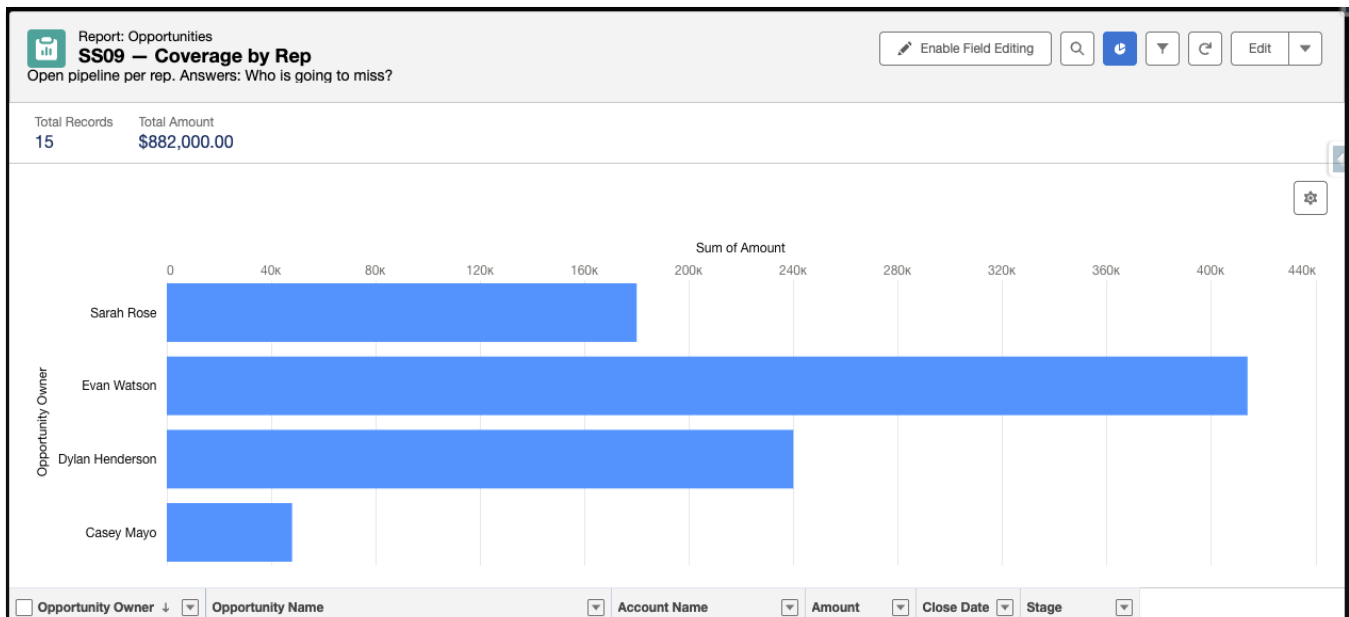
# Pipeline coverage by rep

“Who’s going to miss — and do we know early enough?”

Requested by: VP Sales / CRO

KPI: Coverage ratio per rep (pipeline / quota)

Quota attainment tells you what already happened. Pipeline coverage tells you what’s about to happen. This report shows each rep’s open pipeline relative to their remaining quota. The standard benchmark is 3x–4x coverage. A rep with \$100K remaining and \$150K in pipeline is in trouble even if they feel good about every deal. This report matters most in the first 3–4 weeks of a quarter when you still have time to act.



## If this report doesn't exist:

You don't know which reps are going to miss until it's too late. Managers can't proactively coach. Forecast conversations are based on what's going to close instead of whether there's enough pipeline to support the target.

### Build spec

Report type: Summary • Object: Opportunities (Open) • Filters: Stage  $\neq$  Closed, Close Date = THIS QUARTER • Group by: Owner • Summarize: Sum of Amount, Coverage Ratio formula • Chart: Horizontal bar per rep with 3x reference line • Note: Requires quota data for ratio calculation

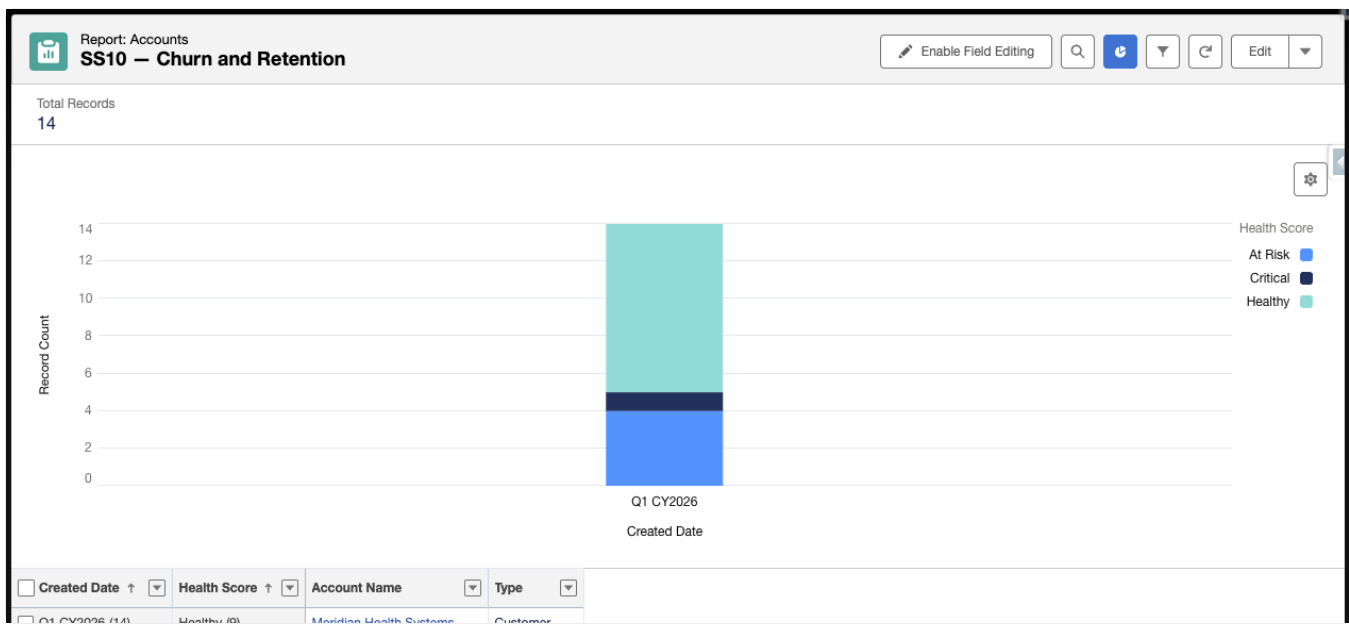
# Churn & retention by cohort

“Are we keeping customers?”

Requested by: CEO / CS Leader / Board

KPI: Gross churn rate, net revenue retention

Acquiring a customer is expensive. Keeping them is where the compound growth happens. Cohort analysis is critical because overall retention numbers can be misleading. This report becomes board-critical once you pass ~\$15M ARR. Net revenue retention above 110% means your existing customers are growing faster than they're churning — the single strongest signal of product-market fit.



## If this report doesn't exist:

You don't know your real retention rate. Investors or board members ask for NRR and someone scrambles to build it from scratch in a spreadsheet. CS resources aren't allocated based on risk — everyone gets the same level of attention regardless of churn signals.

## Build spec

Report type: Matrix • Object: Accounts (with renewal tracking) • Filters: Account Type = Customer • Group by: Account Created Quarter (cohort) > Current Status • Summarize: Record Count, Sum of ARR • Chart: Cohort retention table or stacked column • Note: Requires a churn status field on Account (Active / Churned / Downgraded)

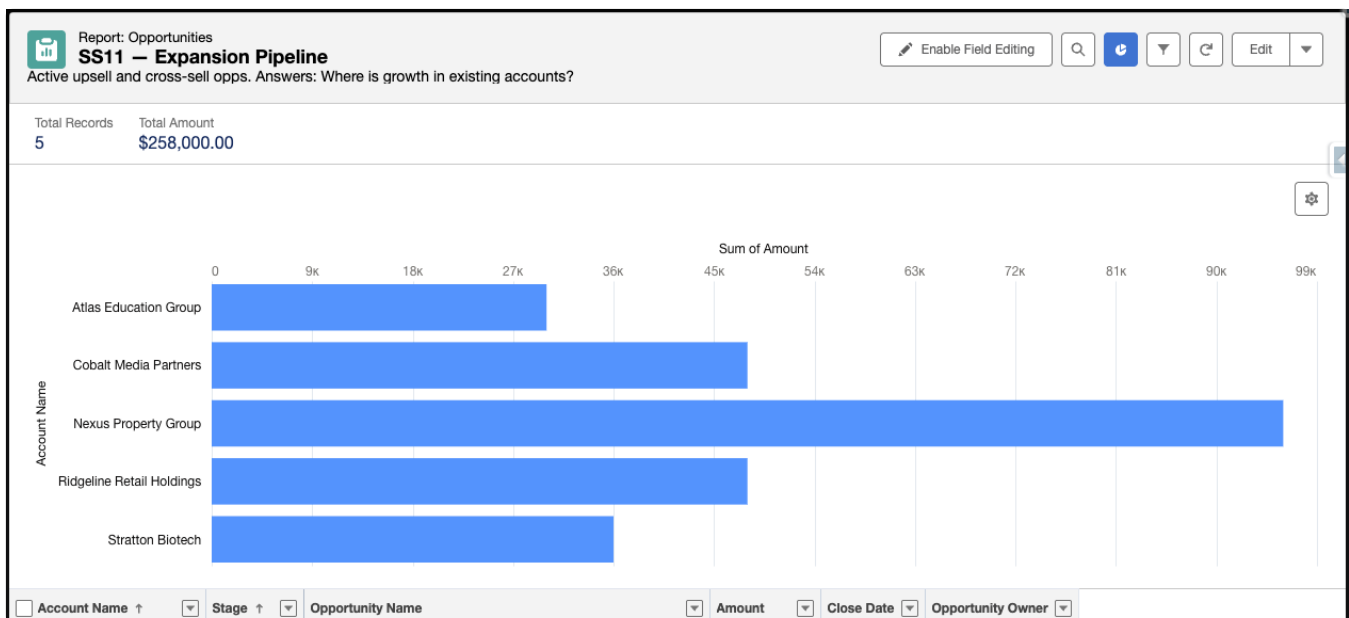
# Expansion pipeline

*“Where’s the growth in existing accounts?”*

Requested by: CRO / CS Leader

KPI: Expansion ARR, ARPU growth

At some point — usually around \$20M–\$30M ARR — expansion revenue becomes as important as new business. The cost to expand an existing account is dramatically lower than acquiring a new logo, and expansion deals typically close faster with higher win rates. This report shows your active upsell and cross-sell pipeline: what’s in play, how much it’s worth, and how fast it’s moving.



## If this report doesn't exist:

Expansion is treated as a happy accident instead of a revenue motion. CS and Sales have no shared view of which accounts are ripe for growth. Renewals happen at the same contract value because nobody proactively sells expansion.

## Build spec

Report type: Summary • Object: Opportunities • Filters: Type = Expansion, Stage ≠ Closed Lost • Group by: Account > Stage > Owner • Summarize: Sum of Amount, Record Count • Chart: Horizontal bar by account • Note: Requires Expansion as a distinct Opportunity Type value

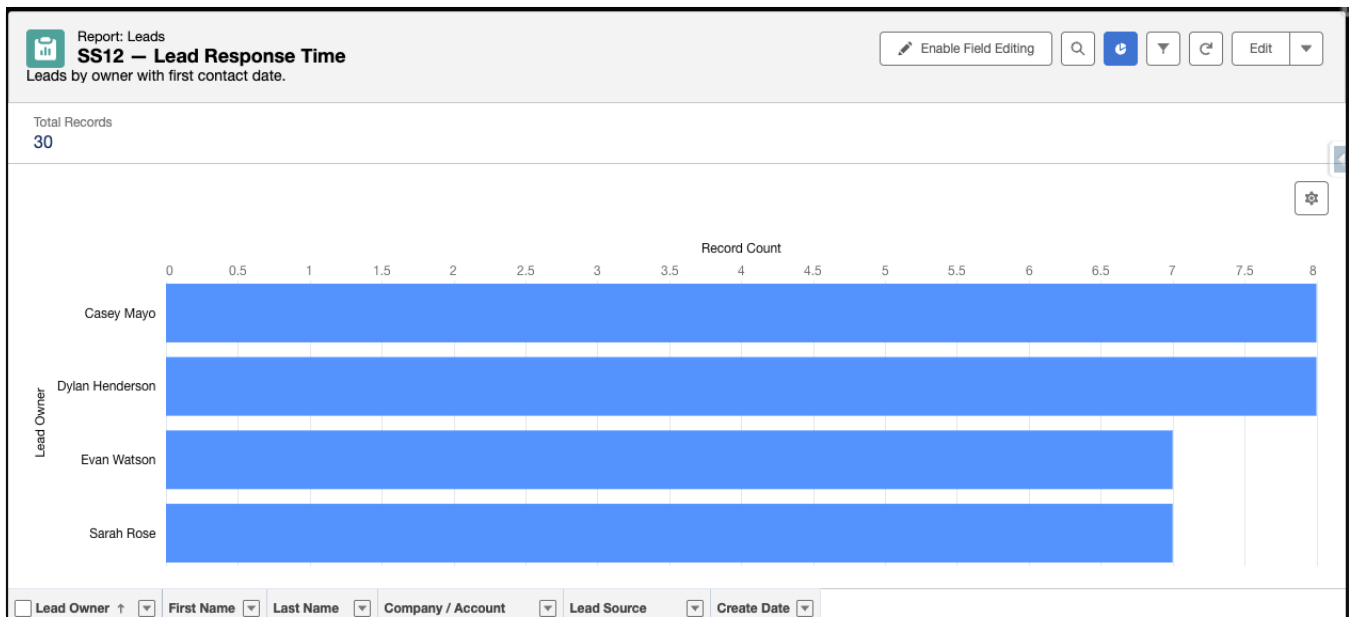
# Lead response time

“How fast are we following up?”

Requested by: VP Sales / CRO / CMO

KPI: Avg time to first contact, % under SLA

Responding to a lead within the first 5 minutes dramatically increases conversion. After 30 minutes, the odds drop significantly. This report tracks how long it takes your team to make first contact. It's one of the highest-ROI operational metrics because improving it doesn't require more leads, more reps, or more spend. The most common finding: teams think their response time is under an hour. It's actually 6–12 hours.



### If this report doesn't exist:

You're spending money on lead generation but don't know if anyone's following up quickly. Marketing generates leads and assumes Sales is on it. Your cost per acquisition is inflated because you're losing leads from slow follow-up, not bad targeting.

### Build spec

Report type: Summary • Object: Leads • Filters: Created Date = THIS MONTH, Lead Source ≠ null • Group by: Owner > Lead Source • Summarize: Avg of Time to First Contact, % under SLA • Chart: Horizontal bar by rep • Note: Requires a custom First Contact Date field populated by Flow

# Customer health dashboard

*“Which accounts need attention right now?”*

Requested by: CS Leader / CRO

KPI: Health score distribution, at-risk count

Churn doesn't happen overnight. It builds slowly through missed check-ins, declining usage, unresolved tickets, and quiet disengagement. A customer health dashboard combines multiple signals into a single view that flags at-risk accounts before they churn. Even a simple version — accounts with open tickets + no check-in in 60 days + renewal in 90 days — is dramatically better than nothing.



## If this report doesn't exist:

Churn surprises you. Every lost customer feels like it came out of nowhere because there's no early warning system. Renewal conversations start without any context on whether the customer is happy or at risk.

## Build spec

Report type: Dashboard • Object: Accounts, Cases, Activities • Filters: Account Status = Active • Group by: Health Score (Red / Yellow / Green) > Owner • Summarize: Record Count by tier, Sum of ARR at risk • Chart: Donut + list of critical accounts • Note: Start with a manual Health Score picklist on Account, then automate with Flow

# Data quality scorecard

*“The report nobody asks for — but everybody needs”*

Requested by: RevOps (proactive)

KPI: Field completion rate, duplicate rate, stale opps

Every report in this guide depends on clean data. The Data Quality Scorecard tells you whether you can trust the other 13. It tracks field completion rates, duplicate records, stale opportunities, and workaround values like TBD and N/A. This is the report your RevOps team should build before anyone asks for it. When the CRO says ‘this number looks wrong,’ the person who has this scorecard already has the answer.



## If this report doesn't exist:

You find out about data quality problems after they've already corrupted a board report. Fields have workaround values that pass validation rules but produce garbage reporting. Stale opportunities inflate your pipeline by 20–30%.

## Build spec

Report type: Dashboard (4–5 components) • Component 1: Field Completion Rate on key Opportunity fields (target 95%+) • Component 2: Duplicate Records flagged by duplicate rules (target < 2%) • Component 3: Stale Opportunities with no activity in 60+ days • Component 4: Records with TBD/N/A/Test values • Run weekly. Assign one data steward to review every Monday.



# Need help building these?

We build and manage Salesforce for B2B  
tech companies scaling \$3M to \$100M ARR.

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