



THE DEFINITIVE REFERENCE

# GTM Stack Glossary

## A-Z

200+ Terms Across Martech, RevOps, CRM Architecture, Analytics & SaaS Lifecycle Management

**200+**

Terms Defined

**8**

Core Categories

**Mid-Senior**

RevOps Focus

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## FOREWORD

## From the RevOps Brief Team

Here's the thing nobody tells you when you step into a RevOps role for the first time: half the job is translation. You're sitting between Sales, Marketing, and Finance — three teams that have spent years building their own dialects — and you're expected to make them actually talk to each other. Good luck, because half the time they're using the same words to mean completely different things.

Pipeline. Qualified lead. Opportunity. Revenue. I've been in rooms where a VP of Sales and a CMO spent forty-five minutes arguing before realising they were debating different numbers from different systems built on different definitions. That wasn't a data problem. It was a language problem.

That's what this glossary exists to fix. Not the glossy, vendor-sponsored kind that defines everything in a way that makes a particular platform look essential. A real one. The kind you reach for when you're onboarding a new head of demand gen and need them to understand what an MQL actually means inside your organisation — not just in theory. The kind you use when your CRO asks why the pipeline number in Salesforce doesn't match the one in the board deck. (It's always different. That's its own entry.)

We've written every definition the way a senior RevOps practitioner would explain it to a peer over coffee — direct, opinionated, and willing to say when something is overhyped or widely misunderstood. Some of these terms have clean, agreed-upon definitions. Others have four definitions depending on which company you worked at last, and we've tried to be honest about that too.

A few things this isn't: it's not a vendor directory. It's not a beginner's guide to SaaS. It's not a content marketing exercise dressed up as a resource. It's aimed squarely at people who already know their way around a CRM and a QBR, who've had the attribution argument more than twice, and who want a reference they can actually trust.

Use it however helps. Stick it in your team's Notion. Share it with a new hire. Pull it up when a vendor starts throwing acronyms at you in a demo. Argue with us about it — honestly, we'd welcome that.

RevOps is still young enough that the vocabulary isn't settled. This is our contribution to getting it there.

### The RevOps Brief Team

[revopsbrief.com](https://revopsbrief.com)

#### HOW TO USE

Organised A-Z with category tags on every entry. Read straight through or jump to what you need.

Tags: [MKT] Marketing [CRM] CRM Architecture [ANA] Analytics [OPS] Revenue Operations [TECH] MarTech [SLS] Sales [CS] Customer Success [DATA] Data & Infrastructure

*Entries marked with a star (★) are the ones every RevOps professional should be able to define cold in any meeting. Everything else is context.*

## QUICK REFERENCE

## The 8 Domains. Why They All Matter.

RevOps doesn't live in one corner of the stack. It runs through all of it. These eight domains are the territories — and in most organisations they're poorly connected, inconsistently named, and nobody quite owns the seams between them. That's your job.

CODE	DOMAIN	WHAT IT ACTUALLY COVERS
[MKT]	<b>Marketing &amp; Demand Generation</b>	Campaign execution, lead gen, ABM, content, inbound and outbound. Where the top of funnel gets built — or doesn't.
[CRM]	<b>CRM Architecture</b>	Object models, pipeline stages, territory hierarchies, workflow logic, data integrity. The bones of the commercial operation.
[ANA]	<b>Analytics &amp; Reporting</b>	Attribution, funnel metrics, dashboards, forecasting, BI. What you measure, how you measure it, and who trusts the numbers.
[OPS]	<b>Revenue Operations</b>	Process design, GTM alignment, rev recognition, capacity planning, cross-functional governance. The connective tissue.
[TECH]	<b>MarTech Stack Management</b>	Tool selection, integration architecture, vendor management, rationalisation. The infrastructure that either enables or slows everything else.
[SLS]	<b>Sales Enablement &amp; Execution</b>	Methodology, territory design, quota setting, deal desk, pipeline management. How deals actually get done.
[CS]	<b>Customer Success &amp; Expansion</b>	Onboarding, health scoring, renewals, NPS, churn prevention, upsell motion. Where revenue is protected and grown.
[DATA]	<b>Data &amp; Infrastructure</b>	Governance, CDP/warehouse architecture, identity resolution, compliance. The foundation everything else is built on.

## The Maturity Curve: Where You Probably Are vs Where You Think You Are

Most RevOps teams overestimate their maturity by about one stage. That's not a criticism — it's human nature. Here's what each stage actually looks like on the ground.

LEVEL	STAGE	WHAT IT ACTUALLY LOOKS LIKE
Stage 1	<b>Reactive</b>	You're firefighting. Every week is different. CRM has records nobody trusts. The revenue number lives in someone's spreadsheet. Reports are assembled in PowerPoint at 10pm before the board meeting. Sound familiar?
Stage 2	<b>Functional</b>	Each team has a process. Just not the same one. Marketing celebrates MQLs Sales ignores. The attribution argument happened three times this quarter. Your stack is tools you accumulated rather than chose.

<b>Stage 3</b>	<b>Aligned</b>	Shared definitions people actually honour. A CRM architecture that wasn't built by accident. Marketing and Sales agreed on the MQL definition — and it's written down. Dashboards people believe.
<b>Stage 4</b>	<b>Predictive</b>	You forecast with genuine confidence. Health scores actually predict churn — you checked. Attribution informs real budget decisions, not just slides. The machine starts to hum.
<b>Stage 5</b>	<b>Compounding</b>	You're not managing the engine anymore — it runs. Signals feed models. Models trigger plays. Plays build pipeline. Revenue is an output of the system, not a monthly prayer.

# A

## A/B Testing

[MKT] [ANA]

Run two versions, see which performs better, do more of that. Simple in concept, routinely botched in practice. The most common error is declaring a winner after a hundred impressions — that's not a result, it's noise. In RevOps the discipline extends well beyond marketing assets: test your sales sequences, your demo booking pages, your renewal outreach timing. The rigour should travel with the practice. It usually doesn't.

*Worth knowing: One variable per test. The moment you're testing two things simultaneously you need a sample size most B2B teams can't generate.*

## ★ ABM (Account-Based Marketing)

[MKT] [SLS]

Flip the traditional funnel. Instead of casting wide, generating volume, and sorting through what comes up — you pick your accounts first and build upward from there. Tiers matter more than most ABM programmes acknowledge: Tier 1 gets bespoke, executive-level engagement; Tier 2 gets personalised-at-scale; Tier 3 gets smart automation. Where ABM reliably falls apart is when Marketing runs it as a campaign and Sales treats it as background noise. Without genuine AE buy-in on the target list, it's expensive advertising with a better story.

*Watch out: If your AEs can't name their top ten target accounts without looking them up, your ABM programme is a Marketing project, not a company motion.*

## Account Scoring

[CRM] [SLS] [ANA]

Fit plus intent, combined into a number. Fit answers: does this account look like our best customers? Intent answers: are they in-market right now? A mature account score feeds territory prioritisation, SDR sequencing decisions, and AE prioritisation. An immature one is a CRM field nobody uses, built on assumptions nobody has validated.

## ★ ACV (Annual Contract Value)

[OPS] [SLS] [ANA]

The annualised value of a deal, regardless of contract length. A three-year £300K contract has the same ACV as a one-year £100K contract. It's the standard unit for comparing deals across different lengths, the workhorse of sales performance reporting, and the basis for pipeline coverage calculations. The common trip-up: ACV usually excludes one-time professional services. Make that decision, document it, get Finance to agree, and never change it mid-year.

*Worth knowing: ACV and TCV (Total Contract Value) get conflated constantly in board decks. When someone says 'the deal was worth X' — ask which one they mean.*

## AI SDR

[SLS] [TECH]

An AI-powered agent that automates outbound prospecting — researching accounts, personalising outreach, managing sequences, qualifying responses. Vendors like Artisan, 11x, and Clay-based workflows have made this category genuinely credible through 2024-2025. The honest picture: excellent for volume and consistency, still developing when it comes to nuanced qualification and reading a situation that doesn't fit the playbook. Best implementations pair AI scale with human judgment at key moments.

## ★ ARR (Annual Recurring Revenue)

[OPS] [ANA]

The number. In SaaS, this is the metric everything else answers to. ARR is MRR times twelve. But the raw total is less useful than the decomposition: New ARR from fresh logos, Expansion ARR from accounts that grew, Contraction ARR from accounts that downsized, Churned ARR from accounts that left. The ARR bridge — showing how you moved from opening to closing ARR across a period — is one of the most honest documents a RevOps team produces. If you've never built one, stop what you're doing.

*Worth knowing: Your CRM and billing system will show different ARR numbers. They always do. Understanding why is usually the first real project a new RevOps hire tackles.*

## Attribution (Marketing)

[MKT] [ANA]

Deciding which touchpoints get credit for a conversion. First-touch rewards whoever got there first. Last-touch rewards whoever was there at the moment of conversion. Linear splits credit evenly across all touches. Time-decay weights recent interactions more heavily. Data-driven models use statistical analysis to allocate credit based on what actually correlates with wins. Every model is wrong in different ways. Pick one you can defend consistently and supplement it with qualitative insight from your sales team.

*Watch out: Switching attribution models mid-year is one of the most disruptive things you can do to marketing analytics. Lock in your model at the start of each fiscal year.*

## Automation (Marketing)

[MKT] [TECH]

Triggers fire, emails send, scores update, leads route — all without a human doing it manually. That's the clean version. The version most mature stacks quietly become is a tangle of overlapping workflows that nobody fully understands, some of which contradict each other, firing at contacts who have no idea why they're getting this message. Automation audits are not glamorous. They are necessary. Schedule them.

# B

## B2B SaaS

[OPS]

Business-to-business software delivered as a subscription. The commercial model that most of what's in this glossary is built around. The subscription structure changes the commercial logic fundamentally: you don't just have to win a deal, you have to keep winning it at every renewal. Acquisition and retention carry equal commercial weight. That's not obvious in a traditional sales culture, which is part of why RevOps exists.

## Blended CAC

[OPS] [ANA]

Total acquisition cost — paid and organic — divided by new customers acquired. The blended number is useful for investor conversations. It's less useful for channel decisions, because a declining blended CAC driven by organic growth can mask a paid CAC that's quietly ballooning. Always decompose it. The headline metric tells you where you are; the channel breakdown tells you what to do about it.

## ★ Bookings

[OPS] [SLS]

Signed contracts. The value of deals inked in a period, regardless of when revenue will be recognised or cash collected. Bookings is what you've sold — not what you've earned, not what's in ARR yet. New, Renewal, Expansion, and Professional Services bookings should be tracked separately. The critical thing: Bookings, Revenue, and ARR are three different numbers describing three different things. Confusing them — especially in early-stage companies — is a mistake that tends to surface at the worst possible moment.

*Worth knowing: What triggers a booking? Signature, start date, or first invoice? Decide. Document it. Get your CFO to agree. Hold the line.*

## BDR (Business Development Representative)

[SLS]

Outbound prospecting, usually into net-new or greenfield territory. The BDR/SDR distinction is meaningful in some organisations and irrelevant in others. What matters isn't the title — it's clarity on the motion: who they're targeting, how they're measured (meetings? pipeline sourced?), and how the handoff to AEs works.

## Buyer Journey

[MKT] [SLS]

The path from 'we have a problem' to 'we've signed a contract.' Rarely linear in real life. Real B2B buying involves multiple stakeholders doing overlapping research, looping back through stages they've already passed, and being influenced by conversations that never touch a tracked channel. The

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Awareness-Consideration-Decision model is useful for structuring content. It is not an accurate map of how people actually buy.

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## Buying Committee

[SLS] [MKT]

Everyone who influences or makes the purchase decision. In enterprise B2B, that's almost never one person. You've got the Economic Buyer who controls the budget, the Champion who wants this to happen, End Users who'll live with it, Technical Evaluators who need to approve it, and Procurement who'll renegotiate everything at the end. Multi-threaded selling — building relationships across the committee, not just with your primary contact — is what separates deals that close from deals that go dark three weeks before the expected date.

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# C

## ★ CAC (Customer Acquisition Cost)

[OPS] [ANA]

The fully-loaded cost to acquire one new customer. Total sales and marketing spend divided by new customers acquired. Straightforward in principle; the fight is always in the numerator — does it include headcount? Tooling? Overhead allocation? There's no universally correct answer, but yours needs to be agreed with Finance and held constant. The derived metric that matters most is CAC Payback Period: how many months of gross margin it takes to recover what you spent. Under twelve months is world class. Over eighteen is a flag.

*Watch out: CAC calculations that exclude sales headcount are designed to make the number look better. Get your CFO to define it with you, not for you.*

## Cadence

[SLS] [MKT]

A structured outreach sequence — emails, calls, LinkedIn messages, video notes — with defined spacing and channel mix. Cadence design is both science and craft. The science is touch count, timing, and channel. The craft is writing messages that don't feel like they came from a sequence. The ops challenge: badly designed cadences generate activity data that looks healthy in a dashboard but never converts. Audit against reply rates and meeting rates, not completion rates.

## CDP (Customer Data Platform)

[DATA] [TECH]

Pulls customer data from everywhere, builds persistent unified profiles, makes those profiles available across the stack. The theory is a single, clean customer record. The practice requires solving identity resolution — working out that the lead in your MAP, the contact in Salesforce, the user in your product, and the website visitor are all the same person. That problem is harder than any vendor demo suggests.

*Worth knowing: A CDP amplifies whatever data quality you feed it. Clean data in, better activation out. Dirty data in, the mess circulates faster and at greater expense.*

## ★ Churn Rate

[CS] [ANA] [OPS]

The rate at which customers leave. Gross Churn covers revenue or customers lost. Net Revenue Retention accounts for expansion against those losses. A business with 10% gross churn but 130% NRR is growing the existing base even as customers leave. A business with 3% gross churn and 90% NRR is shrinking it despite strong-looking headline retention. You need both numbers together. And segment them — SMB churn and Enterprise churn are different animals that require different responses.

*Watch out: Blending churn across segments produces numbers that look tolerable while hiding a serious problem in one of them. Segment before you draw any conclusions.*

## CLG (Community-Led Growth)

[MKT] [CS]

Where the community around your product drives acquisition, retention, and expansion through peer advocacy, shared learning, and genuine user identity. Notion, HubSpot, and dbt are the canonical examples. It's real and powerful — and it's not free. Building a community that actually drives commercial outcomes takes years of consistent investment. The brands that treat it as free marketing tend to end up with a Slack workspace and 200 members who haven't opened it since February.

## Closed-Lost Analysis

[SLS] [ANA] [OPS]

Looking at the deals you didn't win and understanding why — not the surface reason, which is usually useless ('went with a competitor'), but the detail underneath: which competitor, at what price, at what stage did you become aware of them, what did the champion tell you privately. Good closed-lost analysis requires structured loss data in the CRM and leadership that's actually willing to hear the uncomfortable answers and change something in response.

## Cohort Analysis

[ANA] [CS]

Grouping customers by when they started — or some shared characteristic — and tracking what happens to each group over time. Are Q1 cohorts retaining better than Q3? Do referral customers churn more slowly than paid search customers? Cohort analysis is one of the most powerful tools in the retention toolkit and one of the most underused. You need at least twelve months of data before the patterns start meaning anything.

*Worth knowing: Monthly cohort retention views with gross and net retention data are the minimum baseline. If you can add expansion data at the cohort level, you're doing this properly.*

## Competitive Intelligence (CI)

[SLS] [OPS]

Knowing what your competitors are doing — their positioning, pricing, product direction, recent wins and losses, and how they're showing up in your active deals. CI feeds battlecard development, sharpens win/loss analysis, and helps reps handle the conversations they're going to have whether they're prepared or not. Good CI is an ongoing programme. Tools like Crayon and Klue automate signal capture. Nothing replaces talking to customers who evaluated alternatives.

## Contact Enrichment

[DATA] [CRM]

Filling gaps in your CRM records using third-party data — job titles, LinkedIn profiles, direct dials, company size, tech stack, email addresses. ZoomInfo, Apollo, Cognism, and Lusha all play here. Quality varies significantly by provider, by geography, and by your ICP segment. European contact data tends to be patchier than US. Build validation logic into your enrichment flows and don't assume enriched data is accurate without a sanity check.

## Conversion Rate

[MKT] [ANA] [SLS]

The percentage of records moving from one stage to the next. Visitor to lead. Lead to MQL. MQL to SQL. SQL to Opportunity. Opportunity to Closed Won. Each rate tells a different story about where the friction is and what's causing it. Industry benchmarks are available and largely useless for actual decision-making, because your rates are a function of your specific ICP, channels, price point, and motion. Build internal benchmarks first. Track trend, not absolute.

## CPL (Cost Per Lead)

[MKT] [ANA]

How much you're paying to generate a lead. Dangerous to optimise in isolation. A low CPL that produces leads who close at 0.5% is more expensive in real terms than a high CPL with an 8% close rate. CPL only means something alongside lead quality metrics — MQL conversion rate at minimum, pipeline-to-spend ratio ideally. Optimising for CPL alone is one of the fastest ways to flood your SDRs with low-quality leads and break the Marketing-Sales relationship permanently.

## ★ CRM (Customer Relationship Management)

[CRM] [TECH] [OPS]

Both the software category and the practice. In RevOps, the CRM is the system of record for the commercial organisation — where contacts, accounts, opportunities, and activities live. Salesforce dominates enterprise. HubSpot has grown significantly into mid-market. The CRM is only as good as what goes into it and whether people trust what comes out. A system with 60% adoption isn't a CRM — it's a filing cabinet that some of your team occasionally uses.

*Watch out: Every time someone says 'the CRM data isn't reliable,' there's a process problem underneath it. The tool is almost never the actual issue.*

## CSM (Customer Success Manager)

[CS]

The person who owns the customer relationship after the deal closes. Responsible for making sure the customer achieves what was promised in the sale — which is harder than it sounds, because those outcomes are often vague and the customer's internal priorities will have shifted by the time they're onboarded. In PLG organisations, CSMs often work digitally across large account bases. In enterprise, they operate closer to a strategic advisor.

## Customer Health Score

[CS] [ANA]

A composite score aggregating signals — product usage, support volume, NPS response, executive engagement, contract coverage — to predict churn risk or expansion potential. The score is only useful if it's actually predictive. Many health scores are elaborate dashboard decorations that correlate with nothing. Calibrate yours against real churn and expansion outcomes quarterly. If it's not predictive, rebuild it.

*Worth knowing: Login frequency is the most common health score input and one of the weakest. A customer logging in daily to do something they hate is not a healthy customer.*

# D

## Dark Funnel

[MKT] [ANA]

The 60-80% of the buyer journey that happens in places you can't track. The Slack message where someone asks for a vendor recommendation. The G2 review a prospect reads at midnight. The conference conversation. The analyst briefing. The podcast episode that plants the seed. Your attribution models capture the surface. The dark funnel is where conviction is built. The implication: invest in brand, community, and presence in spaces where buyers talk to each other, even though you can't put a clean ROI number on it.

*Worth knowing: The dark funnel isn't measurable by definition. That doesn't mean it doesn't matter — it means you have to invest in it on conviction, not on a spreadsheet.*

## Data Governance

[DATA] [OPS]

The framework that determines what your data looks like, who owns it, how it's maintained, and what the rules are for changing it. Field naming conventions, deduplication policies, enrichment standards, retention schedules. Unglamorous. Absolutely foundational. Everything else — attribution, forecasting, health scoring, territory design — is built on top of data. If the foundation is rotten, the building sways.

## Deal Desk

[SLS] [OPS]

The function that handles complex, non-standard deals — custom pricing, unusual contract structures, multi-product configurations, approval workflows that cross Sales, Legal, Finance, and RevOps. A well-designed Deal Desk moves complex deals faster by providing a clear, fast path through the exceptions. A poorly designed one creates queues, power struggles, and AEs who start going around it.

*Worth knowing: Track your Deal Desk SLA compliance. If average response time keeps creeping up, you have either a capacity problem or a process problem. Different fixes.*

## Dead Funnel Audit

[OPS] [CRM]

A review of opportunities that have gone cold — stuck in a stage well past their close date, no recent activity, nobody's touched them in weeks. Dead funnel audits do two things: they clean up the pipeline inflation that's distorting your coverage ratio and your forecast, and they surface deals that might actually be recoverable. Run one monthly. It's uncomfortable. It's necessary.

## Demand Generation

[MKT]

Building conditions in the market where prospects either come to you or are receptive when you reach out. Content, SEO, events, webinars, paid media, thought leadership. Often confused with lead generation, but the distinction matters: demand generation builds the market; lead generation captures

the fraction that's ready now. Companies that invest only in lead gen eventually starve their pipeline because they haven't built the broader awareness that leads emerge from.

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## Digital Motion

[SLS] [CS] [MKT]

A scalable, low-touch engagement model using digital channels to drive outcomes that would traditionally need a human. Central to PLG strategies and CS teams managing large SMB bases. The design challenge is genuine: how do you create the feeling of personal attention at the volume where personal attention is economically impossible?

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## Discovery (Sales)

[SLS]

The part of the sales process where you find out what's actually going on inside the prospect's organisation before talking about your solution. Good discovery surfaces the real problem, maps the buying committee, identifies objection risks, and confirms budget and timeline. Bad discovery is a checkbox before the demo. Most late-stage deal losses trace back to something that should have been uncovered in discovery: a champion who wasn't really a champion, a budget that was never confirmed, a competitive situation that came as a surprise.

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## DMP (Data Management Platform)

[DATA] [MKT]

Built for managing anonymous third-party audience data for advertising targeting. Was dominant adtech through the mid-2010s. The decline of third-party cookies has fundamentally undermined the DMP model. Most of the use cases DMPs served have migrated to CDPs working with first-party data. If your stack still includes a legacy DMP, evaluate whether its functions have already been absorbed by other tools — they probably have.

# E

## ELT / ETL

[DATA] [TECH]

How data moves between systems. ETL transforms before loading. ELT loads raw data into a cloud warehouse and transforms it there — enabled by platforms like Snowflake, BigQuery, and Redshift. In RevOps analytics, ELT means your CRM, marketing, product, and financial data can all land in a central warehouse in raw form and be transformed into unified reports without complex pre-processing pipelines. That's the modern GTM data stack.

## ★ Expansion Revenue

[CS] [OPS] [ANA]

Revenue from existing customers — upsell to higher tiers, cross-sell into additional products, seat growth. The most efficient revenue motion in SaaS: near-zero CAC, established trust, shorter sales cycle. NRR above 120% means your existing base is compounding on its own, which changes the economics of the whole business.

*Worth knowing: If your expansion motion is reactive — customers come to you asking to upgrade — you're leaving significant revenue on the table. The proactive motion, triggered by data and owned by CSMs with expansion targets, consistently outperforms.*

# F

## Firmographics

[MKT] [DATA] [CRM]

Organisational attributes that describe a company: industry, headcount, revenue, geography, growth stage, funding status. The B2B equivalent of demographics. First filter in any ICP and the foundation of territory and segmentation design. Firmographic data decays — companies hire, get acquired, pivot. Refresh regularly and build validation into your data workflows.

## First-Party Data

[DATA] [MKT]

Data you collected yourself, from your own customers and prospects, through your owned channels. Yours, fully. As third-party cookies continue their decline, first-party data has moved from a nice-to-have to a genuine strategic asset. Building it well — proper consent frameworks, thoughtful capture mechanisms, a CDP to unify it — is a durable competitive advantage.

## Forecast Accuracy

[OPS] [ANA] [SLS]

How close your predicted revenue number is to what you actually close. Healthy sits in the 90-110% range. Outside that window in either direction, something structural is wrong — reps sandbagging, pipeline being over-qualified, or close date discipline being non-existent. Forecast accuracy is a lagging indicator of pipeline hygiene and management discipline. If it's chronically poor, the fix is upstream, not in the forecasting tool.

*Watch out: A team that consistently over-forecasts by 20% creates real operational damage: over-hiring, over-spending, then a painful reset. Don't let it become normalised.*

## Freemium

[MKT] [OPS]

Give the product away for free, convert on value. No time limit — conversion happens when users hit a ceiling (a feature gate, a seat cap, a usage limit) that makes upgrading the obvious next step. Freemium generates top-of-funnel volume at near-zero direct CAC. It also creates challenges: tracking free-to-paid conversion across systems not built for it, managing a large base of non-paying users, and designing upgrade triggers that feel natural rather than punitive.

## Full-Funnel Attribution

[ANA] [MKT]

Attribution that tracks the complete set of touchpoints from first awareness to closed deal. In practice it requires a unified data model connecting CRM, MAP, product analytics, and ad platforms. It's hard. Most companies that claim to do full-funnel attribution are actually doing multi-touch attribution within the scope of channels they can track. Still worth pursuing — even imperfect full-funnel attribution beats single-touch for making budget decisions.

## ★ Funnel Velocity

[OPS] [SLS] [ANA]

How fast pipeline turns into revenue. Four levers: number of deals, win rate, average deal size, and sales cycle length. Increase any one and velocity rises. The diagnostic power is in the decomposition — when velocity drops, you can isolate which lever is the problem. Win rate declining? Cycle getting longer? Deal sizes shrinking? Each answer points to a different intervention.

*Worth knowing: Calculate velocity by segment. Your enterprise velocity and your SMB velocity are different engines running on different fuel.*

# G

## ★ Go-to-Market (GTM) Strategy

[OPS] [MKT] [SLS]

The plan for how you take your product to market: who you're selling to, what value you're offering, how you price it, which channels you use, and what the commercial motion looks like. GTM strategy is the container that all RevOps work sits inside. A RevOps team executing flawlessly against a flawed GTM strategy will still miss targets. The best RevOps leaders don't just execute strategy — they inform and challenge it.

*Worth knowing: Your GTM strategy should be a live document. Revisit it every time your ICP, market, or product meaningfully changes — not just at your next funding round.*

## Gross Margin

[OPS] [ANA]

Revenue minus the direct cost of delivering the product. For most SaaS companies that's 70-85%, because the marginal cost of an additional user is low once infrastructure is built. Matters to RevOps because it's the denominator in CAC Payback and LTV calculations. Two companies with identical ARR but different gross margins are fundamentally different businesses. Never evaluate CAC or LTV against revenue alone.

## GTM Signals

[OPS] [MKT] [SLS]

Data points indicating a prospect or customer is in a state where outreach is timely and relevant: funding rounds, executive hires, tech installs, usage spikes, G2 review activity, hiring surges. Signal-based selling replaces time-based cadences with event-triggered actions. Instead of 1,000 contacts on a weekly drip, you reach 50 for whom something just happened that makes your conversation relevant right now.

# H

## Handoff (Sales to CS)

[SLS] [CS] [OPS]

The transition from the team that sold the deal to the team that'll deliver on it. Where more deals break than anywhere else — not because the product fails, but because context gets lost. The AE knew things. The champion mentioned constraints. The decision-maker has a specific expectation about timeline. None of it made it to CS. The team walks into the kickoff blind. A clean handoff requires structured process: discovery notes transferred, CS introduced before close, kickoff scheduled before the ink dries.

*Worth knowing: The handoff process should be co-designed by Sales and CS leadership together. RevOps designs it; both sides must own it.*

## HubSpot

[TECH] [CRM] [MKT]

One of the two dominant CRM and marketing platforms in B2B SaaS. Historically strongest in SMB, increasingly credible in mid-market and growing into lower enterprise. Covers CRM, marketing automation, sales engagement, service, and CMS in a single ecosystem with genuine usability. If you're under £100M ARR and don't have deeply entrenched Salesforce customisation, HubSpot deserves serious evaluation as an architectural choice.

## Hygiene (Data Hygiene)

[DATA] [CRM] [OPS]

The ongoing work of keeping CRM and marketing data clean — deduplicating records, standardising fields, enriching incomplete data, archiving dead records, enforcing input standards. Not a project. A practice. Data decays the moment it's captured. The cost of poor hygiene is diffuse and largely invisible — missed outreach, skewed attribution, wrong territory routing — until it compounds into something that breaks a board presentation.

## ★ ICP (Ideal Customer Profile)

[OPS] [MKT] [SLS]

A precise, data-validated description of the type of company most likely to buy, get value, and stick around. Not a target market — an actual profile with specifics: industries, size ranges, geographies, tech stack requirements, buying triggers, and who to exclude. The ICP is the foundation of everything downstream: territory design, content strategy, lead scoring, SDR targeting. When the ICP is vague, every downstream activity is slightly off — and the effects compound over quarters.

*Watch out: An ICP defined by executive intuition without data validation is a hypothesis. Validate yours against your closed-won and best-retained customers. They're already telling you who to go after.*

## Inbound Marketing

[MKT]

Attracting prospects to you through content, SEO, webinars, thought leadership, community — rather than interrupting them with outbound. Inbound is economically attractive: lower CAC, self-educated prospects, higher natural qualification. It's also slow. Content published today builds pipeline six months from now. The organisations that win long-term invest in inbound consistently and layer outbound on top to fill the short-term gap.

## Intent Data

[MKT] [DATA] [SLS]

Signals indicating a company is actively researching your product category — from content consumption, review site visits, search activity, or competitive page behaviour. Bombora provides company-level signals from content network data. G2 tells you when someone in your target account is browsing your category. The important caveat: intent data is directional, not definitive. High intent from a company that doesn't fit your ICP is noise. Use it as one input alongside fit scoring, not as a trigger on its own.

*Worth knowing: Intent plus ICP fit is where the real signal is. High fit, high intent — that's the account your SDR should be calling this afternoon.*

## Integration Architecture

[TECH] [DATA] [OPS]

How the tools in your stack share data — native connectors, iPaaS platforms like Workato or Make, or custom API builds. These decisions have long tails. A fragile MAP-to-CRM integration doesn't just create data inconsistencies — it creates mistrust. When reps don't know whether lead routing is reliable, they work around it. Integration architecture is unglamorous infrastructure work with outsized commercial consequences.

# J

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## Journey Mapping (Customer)

[MKT] [CS] [OPS]

Visualising the steps a customer moves through from first awareness to long-term expansion. Useful for identifying friction points, experience gaps, and automation opportunities. In RevOps, the practical output is trigger-based workflows: what does someone do that signals they've moved from one stage to the next, and what should happen automatically as a result?

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## JTBD (Jobs To Be Done)

[MKT] [SLS]

Reframe from what your product does to what job a customer hires it to do. Developed by Clayton Christensen — the job is the outcome the customer is trying to accomplish. Useful in discovery conversations, in messaging development, and as a diagnostic when win rates start declining: has the job your product does stayed relevant to the market you're targeting?

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# K

## KPI (Key Performance Indicator)

[OPS] [ANA]

The metrics that tell you whether you're on track. In RevOps, KPIs span the full cycle: pipeline coverage, win rates, time-to-close, NRR, CAC payback, churn, expansion. The discipline is in selecting leading indicators alongside lagging ones. The failure mode: a 40-metric dashboard where everyone watches everything and nobody is accountable for anything. Fewer, better-connected KPIs beat comprehensiveness every time.

*Worth knowing: If you can't draw a direct line from a KPI to a revenue or efficiency outcome, question whether it belongs on the dashboard.*

## Kickoff (Customer)

[CS] [OPS]

The first formal meeting between your team and a new customer after signing. Sets the tone for the entire relationship. A good kickoff aligns on success criteria, introduces key contacts on both sides, agrees on communication cadences, and sets the timeline for value delivery. A bad one is where the customer first realises there's a gap between what was sold and what's being delivered. Many churn stories start here.

# L

## ★ Land and Expand

[SLS] [CS] [OPS]

Start small, prove value, grow the account. The initial deal is deliberately limited — one team, one use case, a pilot. The commercial intent is to expand once the customer sees the return. Economically attractive: enterprise accounts won this way often reach 5-10x initial ACV. Operationally demanding: you need strong onboarding, defined expansion triggers, and CSMs who know when to push. Deals that land and don't expand are usually ones where expansion was left to chance.

*Worth knowing: Define your expansion triggers before the deal closes. If CS doesn't know what signal to watch for, expansion won't happen systematically.*

## Lead

[MKT] [CRM] [SLS]

Someone who has expressed interest — form fill, webinar attendance, content download, SDR response. In Salesforce's data model, a Lead is a specific object that converts into Contact + Account + Opportunity when qualified. Lead management — capture, scoring, routing, nurture — is where the Marketing-to-Sales handoff lives and where the relationship between the two functions most often breaks down.

## Lead Routing

[OPS] [CRM] [SLS]

The automated process of getting a new lead to the right rep, quickly. Routing logic considers territory, round-robin fairness, deal size, product interest, and account ownership. When it works, it's invisible. When it breaks — leads going to the wrong rep, sitting unassigned, being duplicated — SDR productivity collapses and leads go cold. Audit routing logic whenever territory structures change.

*Watch out: Lead routing rules that haven't been reviewed in six months should be assumed to have at least one conflict in them. Complexity accumulates silently.*

## Lead Scoring

[MKT] [CRM] [ANA]

A numerical model ranking leads by conversion likelihood — combining fit criteria (who they are) with engagement signals (what they've done). When a lead crosses a threshold, it becomes an MQL and triggers a handoff. The model needs calibration against actual closed-won data. If your top-scoring leads aren't converting at a meaningfully higher rate than mid-tier ones, the model isn't working — it's just generating numbers.

## ★ LTV (Lifetime Value)

[OPS] [ANA] [CS]

Total revenue expected from a customer over the relationship.  $LTV = ARPU \times \text{Gross Margin}\% \text{ divided by Churn Rate}$ . The LTV:CAC ratio is foundational: 3:1 or better is healthy; below 1:1 and you're paying

more to acquire customers than they'll ever return. Every LTV model is a model — it depends on churn rate assumptions that will be wrong to some degree. Segment by cohort and ICP tier to make it actionable.

*Worth knowing: LTV built on blended churn rates across all segments is almost meaningless for decision-making. Build segment-level models.*

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# M

## MAP (Marketing Automation Platform)

[MKT] [TECH]

The engine behind email marketing, lead nurture, campaign execution, landing pages, and lead scoring. Marketo, HubSpot, Pardot, Eloqua, ActiveCampaign are the major players. MAP selection is a significant architectural decision with years of downstream consequences. Choose based on your CRM, your team's technical capability, your nurture complexity, and your actual usage patterns — not the demo.

## ★ MEDDIC / MEDDPICC

[SLS]

A qualification framework that turns 'this deal feels good' into specific, answerable questions. Metrics (economic impact), Economic Buyer (budget control), Decision Criteria (what they're evaluating on), Decision Process (how the decision gets made), Identify Pain (the specific problem driving urgency), Champion (who's selling internally for you), Competition (who else they're evaluating), Paper Process (legal and procurement path). When embedded properly in CRM and referenced in deal reviews, it produces more accurate forecasts and fewer late-stage surprises. When it's a slide deck nobody looks at after training, it produces nothing.

*Worth knowing: The quality of your MEDDPICC implementation is visible in forecast accuracy. Chronically wrong forecasts — start by auditing champion quality and decision process coverage.*

## ★ MQL (Marketing Qualified Lead)

[MKT] [ANA] [OPS]

A lead that Marketing has assessed as ready for Sales engagement. The most politically charged definition in a B2B organisation. Too loose and Sales gets drowned in poor-quality leads and stops trusting the handoff. Too tight and the pipeline starves. The right definition comes from data — specifically, which lead characteristics and behaviours have historically correlated with closed-won deals. Review it quarterly with both Marketing and Sales.

*Watch out: If your Sales team regularly dismisses MQLs as 'not ready,' the MQL definition is wrong. Run a closed-won analysis on MQL-sourced pipeline before the next argument about it.*

## MRR (Monthly Recurring Revenue)

[OPS] [ANA]

The monthly subscription revenue number. ARR divided by twelve. Decompose it exactly as you'd decompose ARR: New, Expansion, Churned, Net New. The two should always reconcile to the same underlying contract data — if they don't, find the discrepancy before it ends up in a board deck.

## Multi-Touch Attribution (MTA)

[MKT] [ANA]

Attribution that credits multiple touchpoints across the buyer journey rather than one. Linear gives equal credit to every touch. Time-decay weights recent touches more heavily. Position-based models give heavy weight to specific moments. Data-driven models use statistical analysis to assign credit based on what actually correlates with conversion. MTA is better than single-touch. It is not a solved problem. Every model makes assumptions that can be challenged and should be.

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# N

## NPS (Net Promoter Score)

[CS] [ANA]

Ask customers how likely they are to recommend you on a 0-10 scale. Promoters (9-10) minus Detractors (0-6) equals your score. Above 50 is excellent. Useful as a pulse metric; limited as a diagnostic. It's a lagging indicator, response rates are low, and a single number hides enormous segment-level variation. Most valuable as a trigger for conversations — specifically, following up personally with every Detractor within 24 hours.

*Worth knowing: The qualitative comment attached to an NPS response is worth ten times the numerical score. The score tells you direction. The comment tells you what to do.*

## ★ NRR (Net Revenue Retention)

[OPS] [CS] [ANA]

The metric that reveals most about a SaaS business's health. Start with last period's revenue from the existing base. Add expansion. Subtract contraction and churn. If you land above 100%, your existing customers are growing even before you add a single new logo. Top-quartile companies sustain NRR above 120%, which means the existing base can compound on its own — new business accelerates growth rather than funding it.

*Worth knowing: Some teams call this NDR (Net Dollar Retention). Same metric, different label. Know which term your finance team uses and don't mix them in the same report.*

## Nurture (Lead Nurture)

[MKT] [TECH]

A sequence of automated, personalised communications designed to educate and build trust with prospects who aren't ready to buy yet. The goal isn't to push people toward a decision — it's to be genuinely useful so you're top of mind when they get there. The failure mode is one-size-fits-all nurture that sends the same email to a CMO at a 500-person company and a coordinator at a ten-person startup. Segment aggressively. Match content to persona and stage.

# O

## Objection Handling

[SLS]

What reps do when prospects push back — on price, timing, competition, or the status quo. The RevOps contribution is the infrastructure: current battlecards, an objection pattern library pulled from call recordings, closed-lost analysis identifying which objections are genuinely fatal versus which are routine friction. Scripted responses help with preparation. Reading the actual objection beneath the stated one is the skill that determines whether they help.

## OKRs (Objectives and Key Results)

[OPS]

A goal-setting framework: qualitative objectives connected to quantifiable results. Works well in RevOps when tied directly to revenue outcomes and when there's genuine alignment between what the team is working on and what leadership needs. Breaks down when there are too many objectives, when they're activity-based rather than outcome-based, or when nobody revisits them after the Q1 planning session.

## Onboarding (Customer)

[CS] [OPS]

Turning a signed contract into a successful customer. The highest-risk period in the customer lifecycle. The gap between what was promised in the sale and what the customer experiences in the first ninety days is where churn decisions are made, even if they don't show up until the renewal. Time-to-first-value is the metric to obsess over — customers who get value quickly retain at dramatically higher rates than those who are still figuring out the product at day sixty.

## Opportunity (Sales)

[CRM] [SLS] [OPS]

A CRM record representing a qualified sales engagement with a genuine chance of closing. Operative word: qualified. Creating opportunities for every exploratory conversation inflates pipeline, corrupts forecast data, and makes every pipeline review a work of fiction. Define your opportunity creation criteria. Enforce them. Reps have an incentive to show pipeline, and premature opportunity creation feels productive. It isn't.

*Watch out: Opportunities created before qualification criteria are met are pipeline inflation, not pipeline. They cost you accuracy and they cost you trust.*

## Outbound (Sales)

[SLS] [MKT]

Proactively reaching prospects who haven't raised their hand — email, phone, LinkedIn, direct mail. Foundational in new market plays where inbound demand doesn't yet exist. Getting harder as inbox noise increases and buyer attention fragments. The only thing that consistently cuts through is relevance — the right message to the right person at the moment it actually matters to them.



# P

## Paid Media

[MKT] [ANA]

You pay, the ad appears. Paid search, paid social (LinkedIn is expensive and often worth it in B2B), display, retargeting, content syndication. A scalable demand generation lever that needs disciplined attribution to prove efficiency. Platform dashboards always overstate ROI. Track CAC by paid channel separately from blended. A declining blended CAC driven by organic growth can mask a paid CAC that's quietly getting out of hand.

## Partner / Channel GTM

[OPS] [SLS]

Using third parties — resellers, integrators, consulting partners, technology alliances — to extend market reach without equivalent headcount investment. The operational overhead is real: partner portals, deal registration, co-sell reporting, training, and the ongoing challenge of maintaining mindshare with partners who are simultaneously selling fifteen other products.

## ★ Pipeline (Sales Pipeline)

[SLS] [CRM] [ANA]

The aggregate view of active opportunities at various stages of the sales process. Measured in total value, by stage, by age, by probability. A healthy pipeline moves predictably: close dates are realistic, conversion rates match historical averages, stages advance. Stale pipeline — opportunities past close date with no activity — is one of the most corrosive forces in GTM. It creates false coverage comfort and makes every pipeline review a negotiation rather than a diagnosis.

*Worth knowing: Pipeline coverage of 3-4x is the conventional benchmark. But your required coverage depends on your actual win rate and forecast accuracy — know your own numbers.*

## Pipeline Coverage

[SLS] [ANA] [OPS]

Pipeline value divided by revenue target. A 3x ratio means three pounds of pipeline for every pound of target. A forward-looking risk signal: low coverage early in a quarter tells you the number is in trouble before the quarter ends. Evaluate it alongside quality — raw coverage inflated by stale or poorly qualified deals is false comfort, not a genuine buffer.

## PLG (Product-Led Growth)

[OPS] [MKT] [TECH]

The product itself drives acquisition, activation, retention, and expansion. Freemium and free trial models let users experience value before paying. Slack, Figma, Notion, and Calendly are the canonical examples. PLG creates a very different RevOps challenge: tracking product usage as a pipeline signal, managing large user bases across CRM and product analytics, and designing conversion moments around in-product behaviour rather than rep-led conversations.

*Worth knowing: PLG and sales-led aren't mutually exclusive. Product-Led Sales (PLS) — using product usage data to trigger enterprise conversations — is the dominant hybrid model in successful growth-stage companies.*

## Pricing (SaaS Pricing Strategy)

[OPS] [SLS]

How you package and price the product for different segments. Per seat, usage-based, flat rate, tiered, outcome-based — the model shapes the entire commercial motion, how deals are structured, how expansion happens, how churn manifests. A 5% price improvement typically has more margin impact than a 30% volume increase. RevOps should own the analytics that inform pricing decisions and be invited into the strategy conversations, not handed decisions after they're made.

## Propensity Model

[ANA] [DATA] [OPS]

A predictive model estimating the likelihood of a specific customer behaviour — churn, expansion, conversion, or response to outreach. Built on historical CRM, product, and marketing data. Powers smarter prioritisation: route high-expansion-propensity accounts to senior CSMs, trigger intervention for high-churn-propensity customers before renewal, focus SDR capacity on accounts most likely to convert.

## PS (Professional Services)

[CS] [OPS]

Implementation, configuration, training, and consulting sold alongside the core subscription. Lower-margin, non-recurring, but it accelerates adoption and often correlates with better long-term retention. Track PS attach rate, margin contribution, and its correlation with renewal rates. If PS-attached customers retain at meaningfully higher rates, that's a signal about implementation complexity as much as services quality.

# Q

## QBR (Quarterly Business Review)

[CS] [SLS] [CRPS]

A formal, scheduled review between vendor and strategic customer covering what's been achieved, what's coming, and where the relationship is heading. Done well: deepens executive relationships, surfaces risk early, opens expansion conversations naturally. Done badly: a PowerPoint nobody prepared, delivered to people who didn't want to be there, about metrics the customer doesn't care about.

*Worth knowing: The QBR should be about the customer's business outcomes, not your product roadmap or renewal pitch. Lead with their results. Let the relationship do the commercial work.*

## Qualification (Lead / Opportunity)

[SLS] [OPS] [CRM]

Determining whether a lead or opportunity deserves further investment. Is there a real problem? Budget? A timeline? Are we a genuine fit? Under-qualification bloats pipeline and corrupts forecasts. Over-qualification filters out winnable deals. Finding the right threshold and holding the organisation to it is an ongoing calibration — not a one-time decision.

## Quota

[SLS] [OPS]

The revenue target assigned to a rep, team, or region. One of the highest-leverage and most consequential things RevOps does. Quota drives behaviour, determines who stays, and shapes the pipeline you end up with. Design principle: ambitious enough for stretch, achievable enough that 60-70% of reps can hit it in a healthy environment. When fewer than half your reps are at quota, the quota is part of the problem even if it isn't all of it.

*Watch out: Mid-year quota changes made without clear rationale and compensation protection damage trust in ways that take years to repair. Handle with extreme care.*

# R

## Reporting Layer

[ANA] [DATA] [OPS]

The dashboards and reports that make GTM performance visible — operational views for managers, executive views for leadership, analytical workbooks for the RevOps team. Only as trustworthy as the data underneath it. No BI tool compensates for CRM data that reps don't believe in. Invest in data quality before investing in dashboard sophistication.

## ★ Retention (Customer)

[CS] [ANA] [OPS]

Keeping customers subscribed and engaged. Gross Retention measures the base minus churn and contraction. Net Retention adds expansion back in. Retention is the most important metric for SaaS financial health at steady state — a high-retention business requires less new business to grow than a high-churn one. The uncomfortable truth: retention is largely determined in the first ninety days. By the time a customer signals they're leaving at renewal, the decision was made months ago.

*Worth knowing: Retention is won in implementation, not in the renewal conversation. What happens in the first 90 days matters more than anything the account team does at month eleven.*

## Revenue Architecture

[OPS] [CRM]

The overarching design of how commercial systems, processes, and data structures support revenue generation. CRM data model, pipeline stage definitions, territory design, quota structure, compensation logic, system integration. The infrastructure of the GTM engine. Get it right and it scales. Get it wrong and every new hire, new product, and new market entry exposes the cracks that were there from the beginning.

## Revenue Intelligence

[ANA] [OPS] [TECH]

AI-powered analysis of GTM data — call recordings, email activity, CRM fields — to surface deal risks, coaching opportunities, and forecast accuracy improvements. Gong and Chorus are the best-known platforms. Real value when findings change behaviour in coaching, deal reviews, and forecast calls. Expensive shelf-ware when it's a reporting tool nobody acts on.

## ★ RevOps (Revenue Operations)

[OPS]

The function that aligns Sales, Marketing, and Customer Success around shared revenue goals through unified processes, integrated technology, consistent data definitions, and shared analytics. Emerged because the alternative — siloed Sales Ops, Marketing Ops, and CS Ops each optimising their own corner — creates fragmentation that makes predictable revenue growth nearly impossible.

The best RevOps leaders are strategic commercial thinkers who happen to understand technology. Not the other way around.

*Worth knowing: RevOps is a business function, not a technical one. If your RevOps team is spending 80% of its time on CRM admin and report requests, something has gone wrong with how the function is positioned.*

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## ROI (Return on Investment)

[ANA] [OPS]

What you got back divided by what you put in. In GTM contexts, applied to marketing programmes, technology investments, and headcount decisions. The calculation is simple; the attribution is the hard part. ROI claims in marketing always rely on attribution assumptions doing heavy lifting. Be transparent about the methodology. A number without a clear methodology isn't a fact — it's an argument dressed up as one.

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# S

## Salesforce

[CRM] [TECH]

The dominant CRM at enterprise scale. Highly customisable, deeply integrated, significantly expensive to implement and maintain. Its power is real — it can be shaped to fit almost any commercial process. Its limitations are equally real: it requires dedicated admin resource, the data model is complex, and years of customisation can make it brittle in ways that only become apparent when you try to change something. Salesforce architecture decisions made in year one compound in year four.

## Sales Cycle Length

[SLS] [ANA]

Average time from opportunity creation to closed deal. Benchmark internally by segment, not against generic industry numbers. Stage-level cycle analysis is more useful than aggregate averages — if deals consistently stall between stage three and four, that's a specific problem with a specific solution. Shortening cycle without sacrificing deal quality is a perennially high-value RevOps objective.

## Segmentation

[MKT] [OPS] [CRM]

Dividing customers and prospects into meaningful groups — firmographic, behavioural, needs-based — so engagement can be tailored appropriately. Drives territory design, content strategy, nurture programmes, pricing tiers, and CS coverage models. Poor segmentation produces the lowest-common-denominator approach that underperforms for everyone and optimises for no one.

## Sequence (Sales)

[SLS] [TECH]

A structured series of outreach steps — emails, call tasks, LinkedIn touches — in a defined order and timing, managed through platforms like Outreach or Salesloft. Design is science and craft: the science is in the data (reply rates, meeting rates); the craft is writing messages that don't sound like they came from a sequence.

## Signal-Led GTM

[OPS] [MKT] [DATA]

GTM outreach triggered by signals rather than schedules. Instead of 500 contacts on a weekly drip, you reach 30 people because something just happened — a funding round, a job change, a tech install, a product usage spike — that makes your outreach timely and relevant. Requires data infrastructure investment and rep training on how to use signals without being awkward about it. The upside in response rates consistently justifies both.

## SLA (Service Level Agreement)

[OPS] [SLS] [MKT]

A formal commitment to a defined service standard. In GTM, the most important is lead response time — the agreement between Marketing and Sales that a new MQL will be contacted within a defined window. SLA compliance correlates directly with MQL conversion rates. Track it. Report on it openly. Act on it when it slips.

## Snowflake / Data Warehouse

[DATA] [ANA]

A cloud data warehouse (Snowflake is the most prominent, alongside BigQuery and Redshift) that centralises data from across the GTM stack for unified analysis. In the modern RevOps data architecture, the warehouse is the centre: CRM, marketing, product, and financial data flow in, get transformed via dbt or similar, and get served to BI tools. The technical infrastructure that makes genuinely unified GTM analytics possible.

## ★ SQL (Sales Qualified Lead)

[SLS] [CRM] [OPS]

A lead that a sales rep has personally reviewed, contacted, and confirmed as a legitimate engagement. Distinct from MQL (Marketing's assessment). The MQL-to-SQL conversion rate is a critical diagnostic. Low conversion means either the MQL definition is generating poor quality, or reps aren't working leads fast enough. Both are problems. They have completely different solutions.

*Worth knowing: Some teams skip MQL/SQL and go straight to pipeline-based models. This simplifies handoff friction but requires stronger upfront qualification discipline from the outbound team.*

## Stack (GTM / Martech Stack)

[TECH] [OPS]

The complete collection of tools powering your go-to-market motion. CRM, MAP, sales engagement, enrichment, analytics, BI, conversation intelligence, product analytics — and more. The average enterprise B2B company runs 90+ marketing tools. Stack rationalisation — identifying redundancy, improving integration, ensuring adoption — is a recurring RevOps mandate. More tools rarely means better. A well-integrated, well-adopted smaller stack beats a comprehensive one nobody fully uses.

# T

## TAM / SAM / SOM

[OPS] [MKT]

Market sizing hierarchy. TAM (Total Addressable Market) is the theoretical maximum. SAM (Serviceable Addressable Market) is what you can reach with your current model. SOM (Serviceable Obtainable Market) is what you can realistically win given competition and GTM capacity. Investors care about TAM. RevOps cares about SAM — it defines the universe of accounts you're actually targeting and the ceiling on your growth model.

## TCV (Total Contract Value)

[OPS] [SLS]

The full value of a contract over its entire term. ACV times contract length. Matters for cash flow planning and understanding financial commitment. ACV is more useful for comparing performance across deals with different lengths. Your CRM should capture both with clean definitions, and they should reconcile to the same underlying contract data.

## Technographics

[DATA] [MKT] [SLS]

Data about the technology a company is running — CRM, ERP, cloud infrastructure, marketing tools, analytics stack. Sourced from job postings, web scraping, browser extensions. Providers include HG Insights, BuiltWith, and Datanyze. Valuable for ICP refinement, competitive displacement plays, and integration-led sales motions where knowing what the prospect already runs is directly relevant to your pitch.

## Territory Design

[OPS] [SLS]

How you divide the market among your sales team. By geography, by vertical, by company size, by named accounts, or some hybrid. Has a bigger impact on rep performance than most organisations acknowledge. Reps in under-served territories miss quota through lack of opportunity, not effort. Data-driven territory modelling, done before quota-setting, is one of the highest-ROI activities RevOps can run.

*Watch out: Territory changes mid-year carry real attrition risk. Plan territories carefully before the fiscal year and communicate changes transparently.*

## Time to Value (TTV)

[CS] [OPS]

Time from contract start to the customer's first meaningful realisation of product value. The most important metric in onboarding. Customers who reach value quickly retain at dramatically higher rates than those still figuring out the product at day sixty. What 'value' means needs to be specifically defined for your product and agreed with the customer at kickoff — a vague aspiration doesn't create the internal urgency that gets onboarding prioritised.

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## Top-of-Funnel (ToFu)

[MKT] [ANA]

The awareness stage. First exposure, early engagement, net-new prospects. SEO, thought leadership, events, paid reach. Metrics are reach-oriented: sessions, impressions, new visitors, downloads. The challenge for RevOps is connecting top-of-funnel investment to bottom-of-funnel outcomes in a way that's credible enough to defend in a budget conversation. It's genuinely hard. Worth doing anyway.

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## Trigger-Based Outreach

[MKT] [SLS] [DATA]

Outreach initiated by a specific event rather than a scheduled sequence. Funding announcement, new hire, product milestone, support ticket resolved, usage threshold crossed. Inherently more relevant than time-based cadences because it connects to something happening in the prospect's world right now. The infrastructure investment is real. The returns on relevance consistently justify it.

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# U / V

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## Upsell

[CS] [SLS] [OPS]

Expansion from within an existing account — higher tier, bigger seat count, additional module. The most efficient revenue motion: near-zero CAC, established trust, shorter cycle. Effective upsell conversations are triggered by data — a usage threshold, a health signal, a business outcome milestone — and led by a champion who's already seen the value. Upsell pushed on customers who haven't realised initial value almost never converts.

## Unified Revenue Model

[OPS] [ANA]

A financial and operational model connecting acquisition metrics (CAC, pipeline, win rates), revenue metrics (ARR, ACV, MRR), and retention metrics (NRR, churn, expansion) into a single coherent view. The tool for scenario planning, headcount modelling, and strategic forecasting. Building and maintaining one is one of the most valuable deliverables RevOps produces for finance-facing leadership.

## Value Proposition

[MKT] [SLS]

What the customer gets, what problem it solves, and why you're better than the alternative. The failure mode: value propositions about the product rather than the customer's outcome. 'AI-powered revenue intelligence platform' is a description. 'Your reps will stop being surprised in pipeline reviews because they'll know which deals are real' is a value proposition. Specificity is the difference.

## Voice of Customer (VoC)

[CS] [MKT] [OPS]

Systematically collecting and acting on customer feedback — interviews, NPS comments, support conversations, review sites, advisory boards. The operational challenge: making feedback reach the people who can act on it, in structured form, rather than being anecdotally referenced in a meeting and promptly forgotten.

# W / X / Y / Z

## Waterfall (Revenue Waterfall)

[OPS] [ANA]

The ARR bridge in visual form: Opening ARR plus New ARR plus Expansion ARR minus Contraction ARR minus Churned ARR equals Closing ARR. One of the most honest and revealing documents a RevOps team can produce. It shows not just whether you hit the number but exactly how you got there and what drove the variance. Build it monthly. Get comfortable explaining every line.

## ★ Win Rate

[SLS] [ANA] [OPS]

Closed Won divided by Closed Won plus Closed Lost. The percentage of contested deals you win. Benchmark by segment, by rep, by deal size, by competitive scenario. A declining late-stage win rate points to competitive or pricing problems. A declining early-stage win rate points to qualification problems. Always calculate against closed opportunities only — open deals haven't declared yet.

*Worth knowing: Win rate calculated against all opportunities including open ones is a common error that makes the number look worse than it is.*

## Workflow Automation

[OPS] [CRM] [TECH]

Rule-based automated actions triggered by events — field updates, email sends, task creation, ownership reassignment, alerts. The foundation of scalable operations. The maintenance problem: workflows accumulate. Twelve clean automations become sixty-seven overlapping ones over three years, some conflicting, none fully documented. Schedule regular audits. Document the business purpose of every automation, not just its trigger logic.

## XDR / SDR / BDR

[SLS]

The family of development representative roles. The proliferation of labels — SDR, BDR, MDR, ADR — reflects genuine variation in how organisations structure prospecting. The label matters less than the clarity of the motion: who they're targeting, how they're measured, and how they hand off to closing reps. Get those three documented and the title can be whatever makes sense.

## Year-Over-Year (YoY)

[ANA] [OPS]

Comparing a metric in the current period to the same period last year. Controls for seasonal variation. ARR growth, pipeline generation, win rates, NPS — all commonly evaluated YoY. Always consider the base effect: doubling from a tiny base is mathematically impressive and commercially irrelevant. The growth rate that matters is the one you can sustain at your current scale.

## Zero-Party Data

[DATA] [MKT]

Data a customer or prospect deliberately shares — preference settings, survey responses, self-declared intent. Unlike first-party (observed behaviour) or third-party (inferred from external sources), zero-party data is explicitly given. No inference risk, no privacy complexity. The catch: you have to create genuine value in exchange for it. People don't fill out preference surveys because you asked nicely.

## ZoomInfo / B2B Data Providers

[DATA] [TECH]

Vendors supplying contact, account, intent, and technographic data to GTM teams. ZoomInfo dominates enterprise. Apollo, Cognism, Lusha, and Clearbit (now part of HubSpot) are strong alternatives by segment and geography. Data quality varies by provider and decays over time. Running multiple providers simultaneously creates deduplication and governance challenges. Most teams run one primary and supplement selectively.

# Key Metrics: Formulas, Benchmarks & Where People Go Wrong

## APPENDIX A

The metrics every RevOps professional should know cold — with formulas, real-world benchmarks, and the calculation errors that have derailed board decks, budget conversations, and planning cycles we've seen firsthand.

METRIC	FORMULA	HEALTHY BENCHMARK	WHERE PEOPLE GO WRONG
<b>ARR</b>	$MRR \times 12$	>20% YoY growth at scale-up stage	Including one-time or non-recurring fees in the total
<b>ACV</b>	$TCV / \text{Contract Years}$	Varies by segment — build internal benchmarks first	Mixing gross and net ACV across reports, or forgetting to exclude PS fees
<b>CAC</b>	$\text{Total S\&M Spend} / \text{New Customers}$	Benchmark vs. payback period (<18 months = healthy)	Excluding headcount from the numerator to make the number look better
<b>CAC Payback</b>	$CAC / (\text{ARPU} \times \text{Gross Margin } \%)$	<12 months world class; <18 months healthy; >24 months — address it	Using revenue instead of gross margin in the denominator
<b>LTV</b>	$\text{ARPU} \times \text{Gross Margin } \% / \text{Churn Rate}$	LTV:CAC ratio of 3:1 or higher	Using blended churn rates that mask cohort-level decay
<b>NRR</b>	$(\text{Start ARR} + \text{Expansion} - \text{Contraction} - \text{Churn}) / \text{Start ARR}$	>110% healthy; >120% world class	Reporting net without also showing gross — which hides the magnitude of churn
<b>Gross Retention</b>	$1 - \text{Gross Revenue Churn Rate}$	>85% SMB; >90% Mid-Market; >95% Enterprise	Confusing gross and net retention in board decks (common and costly)
<b>Win Rate</b>	$\text{Closed Won} / (\text{Won} + \text{Lost})$	20-30% typical; >40% may mean pipeline is too narrow	Including open opportunities in the denominator
<b>Sales Cycle</b>	Avg days: Opp Created to Close Won	Benchmark internally by segment — not against generic norms	Averaging across segments with fundamentally different cycle dynamics
<b>Pipeline Coverage</b>	$\text{Pipeline Value} / \text{Revenue Target}$	3-4x for a typical sales motion	Treating all pipeline stages as equally weighted in the calculation
<b>MQL-to-SQL %</b>	$\text{SQLs} / \text{MQLs in same period}$	60-80% is healthy; below 40% signals definition problem	Time-lag mismatch — MQLs created in one

METRIC	FORMULA	HEALTHY BENCHMARK	WHERE PEOPLE GO WRONG
			period, SQLs in the next
<b>Funnel Velocity</b>	$(\text{Deals} \times \text{Win Rate} \times \text{Avg Deal Size}) / \text{Cycle Length}$	Track direction and trend, not absolute number	Not decomposing which lever is driving velocity change

## APPENDIX B

## The GTM Stack Map: Categories, Tools & Honest Notes

A map of the primary tool categories in a modern B2B GTM stack. Not a vendor endorsement and not exhaustive — the landscape changes faster than any printed list can track. Use it as orientation, not gospel.

CATEGORY	WHAT IT DOES	COMMON TOOLS
<b>CRM</b>	System of record for all commercial activity	Salesforce, HubSpot CRM, Microsoft Dynamics, Pipedrive
<b>Marketing Automation</b>	Lead nurture, campaigns, scoring, email automation	Marketo, HubSpot Marketing, Pardot, Eloqua, ActiveCampaign
<b>Sales Engagement</b>	Sequences, activity tracking, call management	Outreach, Salesloft, Apollo, Reply.io, Groove
<b>Data Enrichment</b>	Contact and account data augmentation	ZoomInfo, Apollo, Cognism, Clearbit, Lusha, Bombora
<b>Conversation Intelligence</b>	Call recording, AI analysis, coaching insights	Gong, Chorus (ZoomInfo), Fireflies, Avoma
<b>Revenue Intelligence</b>	AI-driven pipeline analysis and forecasting	Clari, Boostup, Salesforce Forecasting, Aviso
<b>ABM Platform</b>	Account-based advertising, intent, and engagement	Demandbase, 6sense, Terminus, RollWorks
<b>CDP</b>	Unified customer identity and data activation	Segment, mParticle, Rudderstack, Treasure Data
<b>BI / Analytics</b>	Dashboards, reporting, data visualisation	Looker, Tableau, Power BI, Metabase, Sigma
<b>Data Warehouse</b>	Central data storage and transformation layer	Snowflake, BigQuery, Redshift, Databricks
<b>Integration / iPaaS</b>	System-to-system sync and workflow automation	Workato, Zapier, Boomi, Tray.io, Make
<b>Customer Success</b>	CS workflows, health scoring, renewals	Gainsight, Totango, ChurnZero, Vitaly, Catalyst
<b>Product Analytics</b>	In-product usage tracking and analysis	Amplitude, Mixpanel, Heap, PostHog, FullStory
<b>PRM / Partner</b>	Partner relationship and channel management	Impartner, PartnerStack, Kiflo, Alliances

## APPENDIX C

# 10 Mistakes That Cost Revenue. We've Seen Every Single One.

These aren't hypothetical. They're patterns we've seen play out across organisations at every stage. Some burn slow and invisible until they explode. Some are obvious in retrospect. All of them are avoidable — which is the most frustrating part.

01

**Letting the ICP be defined by committee instead of data**

The ICP conversation becomes political. Sales wants enterprise because the deals are bigger. Marketing wants SMB because the volume is easier. The result is a vague, over-broad profile that focuses on no one. Pull your closed-won data. Look at which accounts retained longest, expanded most, and closed fastest. Let the data lead.

02

**Building dashboards before fixing the data underneath**

Weeks spent building a beautiful BI dashboard on top of CRM data that 40% of the sales team doesn't trust. The dashboard looks impressive. Nobody acts on it. Reporting infrastructure is only as credible as the data it runs on. Fix the plumbing before you redecorate.

03

**Confusing pipeline quantity with pipeline quality**

A 4x coverage ratio of stale, poorly qualified deals feels safe and isn't. Pipeline health requires quality assessment: stage age, conversion by source, recent activity. A clean pipeline consistently outperforms a bloated one. Know what you actually have before you celebrate the coverage number.

04

**Having the MQL argument without resolving it**

Marketing and Sales have this argument twice a year in most organisations and never resolve it. The fix is the data: which lead characteristics have historically correlated with closed-won deals. Rewrite the definition from that. Agree it with both sides in writing. The argument doesn't disappear but it gets shorter.

05

**Buying a tool to fix a process problem**

No platform fixes a broken process. A new MAP doesn't fix a bad nurture strategy. A new forecasting tool doesn't fix pipeline hygiene. A new conversation intelligence platform doesn't fix the absence of coaching. Process clarity first. Tools to scale the process after.

06

**Treating the Sales-to-CS handoff as someone else's problem**

The handoff is where context lives or dies. The AE knows things. The champion shared things. Those things need to reach the CS team in structured form before the kickoff — not in a five-minute call in the parking lot after the contract is signed. Build the process. Own it.

07

**Making budget decisions on last-touch attribution**

Last-touch rewards whoever was there at conversion. It almost always over-indexes on demo request pages and underweights the content that built the conviction that led there. If you're allocating budget based on last-touch data, you're optimising for the surface of the funnel and ignoring the engine underneath it.

08

**Letting stale opportunities stay in the pipeline indefinitely**

A close date that passes without action is not a pipeline record — it's a fiction making your pipeline look healthier than it is. Enforce close date discipline. Remove stale deals. The short-term pain of a smaller pipeline number is always less than the long-term pain of a forecast built on deals that were never going to close.

09

**Setting quotas without modelling territory capacity first**

Quota without territory capacity analysis is guesswork. How many qualified accounts exist in the territory? What's the historical win rate? What's the average deal size and cycle length? The answers define what's achievable. Without them, you're picking a number, telling a story about it, and hoping the rep figures it out.

10

**Building RevOps as a technical function rather than a commercial one**

RevOps that reports into IT or operates as a CRM admin function will never reach its potential. RevOps is a commercial function. It should sit at the GTM leadership table, be in strategy conversations before decisions are made, and be measured by revenue outcomes — not ticket resolution times or CRM field completion rates.



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**This is a living document. The stack changes. The terminology shifts. The debates evolve.**

If a definition is wrong, a term is missing, or something needs updating — we want to hear it.

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