

Pipeline Council

RevOps Data Checklist



The data needed for your pipeline council should be as consistent as possible from week to week. RevOps should be the source of truth for this info and it's ideal to keep it in slides so that you can look back at the history. I suggest using one deck where new slides get incorporated into the deck each week.

The data MUST be sent out ahead of time to maximize the time spent in the meeting.

What to Include:

- Closed Won vs. Goal
- Size of Pipeline "Gap"
- Current Quarter New ARR target
- Opportunities Created by Week vs Goal
- Inbound Opportunities by Source vs. Goal
- Measure Open Pipeline vs. Gap (also weighted)
- Next Quarter Pipeline Amount vs. New ARR Goal
- Current Quarter New ARR Sales Forecast + Weighted Pipe
- # of Dead Opportunities and Their Sources/Reasons
- Opportunity "Move Rate" from Key Stages Forward
- Lead Flow and Website Traffic Health Check
- Sales # of Touches per Outbound Account
- Sales # of Activities per Opportunity
- Sales # of Pushes on Open Deals
- Avg Deal Size of Pipeline
- Avg Age of Pipeline
- Conversion from Top of Funnel to Bottom of Funnel
 - MQL to Opportunity
 - Lead to MQL
 - Contact to Opportunity
 - _____ (Other)