

The CRO's New Weekly Operating Manual

7 Questions Modern Revenue Leaders Should Answer Weekly

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INTRODUCTION

Why it's Essential to Redefine Weekly Forecasting

7 AREAS TO REVIEW

- 1 How are we doing on hiring and attrition vs. our plan?
- 2 Does our current headcount allocation make sense, given performance?
- 3 Are our ramp times on track or falling behind?
- 4 Is enough pipeline being generated to cover our reps?
- 5 Where are certain segments performing differently than plan and why?
- 6 How is quota-on-the-street attainment looking?
- 7 How is our closing performance tracking, in terms of pipeline progression, velocity, win rate and ASP?

CONCLUSION

A More Impactful Weekly Cadence for Revenue Leaders

Why It's Essential to Redefine Weekly Forecasting

Few would argue that in order to have a successful and sustainable revenue organization, it requires looking beyond just weekly pipeline and deal reviews and quarterly targets.

In reality, revenue team leaders are hardwired to primarily focus on weekly forecasting reviews, which give only a narrow picture of what's likely to result in the short term.

What's missing from this weekly cadence is the 'zoom out' to look beyond just the deals currently in play – and to understand how well the key ingredients and inputs underlying your revenue org are performing:

- Hiring and headcount allocation
- Ramp timing
- Pipeline generation and coverage
- Quota attainment
- Closing effectiveness
- Costs

Those elements ultimately produce the outputs you desire: pipeline, revenue, and growth.

Those foundational ingredients are certainly reviewed when building your annual revenue plan – and that plan should be treated as the critical roadmap for the year. But the unfortunate truth is that even after the significant amount of time, effort, and thought spent building and approving the plan, there's not a habitual practice to measure your ongoing performance against that plan (other than the top-line number).

Instead, it may get revisited in QBRs, but let's face it: a three-month gap to react to any deviations from the plan and to understand the root causes of those deviations is a stunningly negligent amount of lag time.



With CROs having an average tenure of just 25 months and only 41% of CEOs having confidence in their revenue leaders ([Harvard Business Review](#)), a new leadership strategy is needed to survive, much less thrive.

The new mandate is that your revenue plan must be seen as actively living and breathing – not just a spreadsheet in a shared folder – and therefore you must quickly and smartly adapt it to the obstacles and opportunities that arise along the way.

Our team at Revcast sees hundreds of revenue plans annually in our work with CROs, heads of RevOps, and Finance analysts. Supported by our AI-powered revenue plan operating system, revenue team leaders and their GTM stakeholders are always in the know about what's happening right now that will impact their revenue outcomes and what their optimal, most efficient path is to reach their revenue goals.

From that experience, we bring you this ebook that we hope will be informative about how modern CROs are operationalizing revenue plan management into an active, agile practice. Regardless of the approach and solution taken, what's needed is a regular cadence of reviewing and then smartly adjusting the foundational contributors to your GTM and revenue “supply chain.”



7 Questions That Modern Revenue Leaders Should Answer Each Week

1

How are we doing on hiring and attrition vs. our plan?

STAKEHOLDERS

CRO

Hiring Managers

HR

It's crucial that everyone stays on top of how quickly and effectively hiring is happening. Delays at any point – from HR recruiting to stakeholder interviews to onboarding timing – can impact revenue several quarters from now, even for just one headcount.

A relatable hiring process scenario is that it may take longer than necessary to put a great candidate through the process, given that they need to get on the schedule for multiple internal interviewers (some of whom may be unavailable due to travel or PTO) and then back-and-forth with reference checking and employment contracts term negotiations.

The revenue impact down the road of these collective delays is often not top of mind, particularly for those not directly accountable for hitting revenue targets.

Similarly, attrition that wasn't baked into your assumptions, exceeds your assumptions, or happens at an unexpected time will also affect your ability to achieve your revenue goals. It may trigger a hiring cycle to backfill, or you may find that the attrition can be absorbed if you're over-performing and therefore bring cost efficiencies. Weekly reviews must include status on hiring progress and attrition impacts.

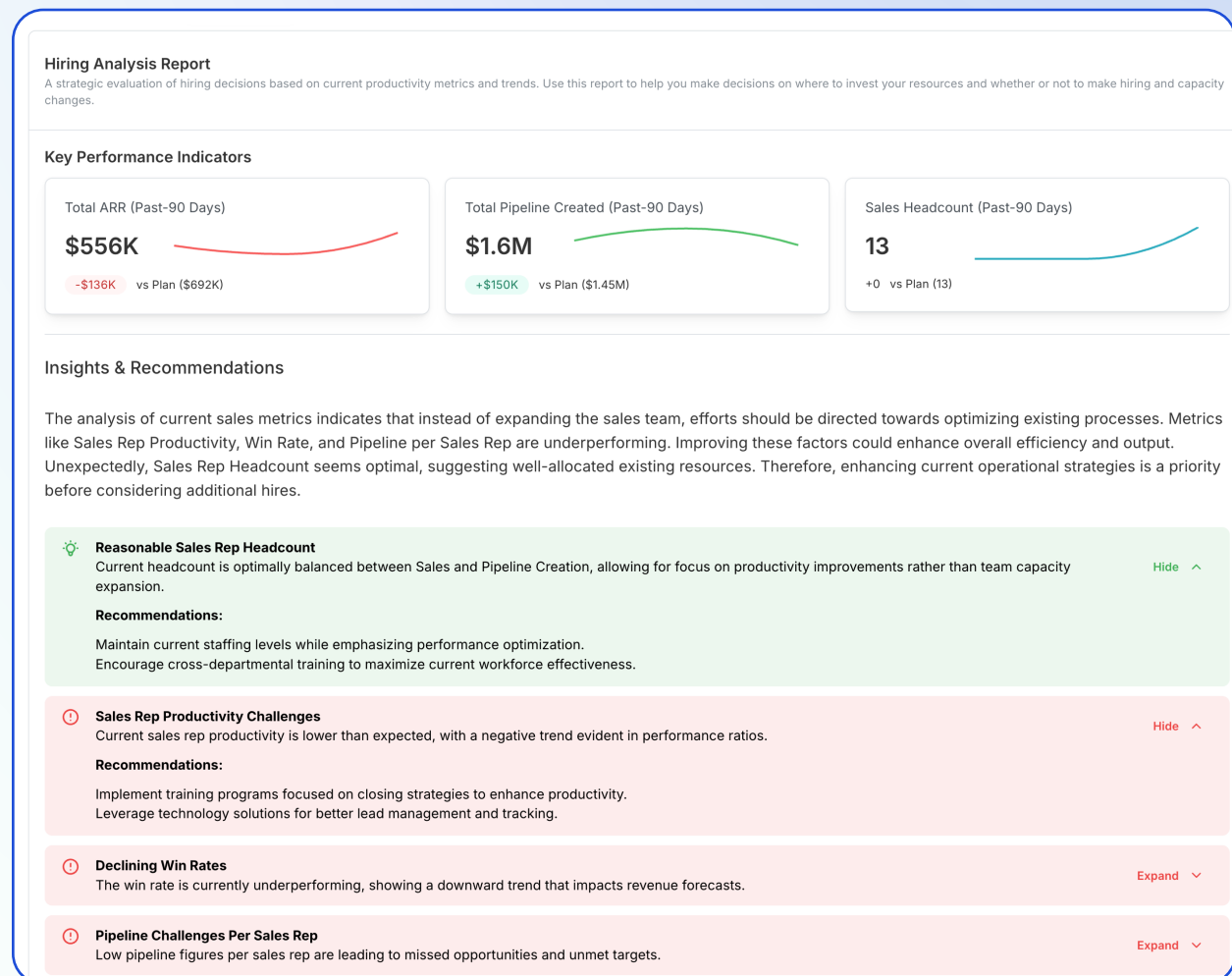


How Revcast Helps

Revcast provides a centralized place to:

1. Track these updates
2. Ask our AI if it makes sense to hire now
3. Automatically calculate the impact of hiring and attrition timing on future revenue outcomes and budget.

In the screen shot example shown below, Revcast's AI lets our revenue leader know that current headcount is tracking to plan, but that due to challenges with lower-than-desired pipeline and win rates, a focus on process improvements and efficiencies is recommended to improve rep productivity before making additional hires.



Does our headcount allocation make sense, given performance?

STAKEHOLDERS

CRO

Sales Team Managers

Finance Analysts

You should be reviewing data regularly to help determine if you have the right mix of headcount across your revenue team segments. This would be both for function (BDRs vs. AEs vs. Sales Engineers) and for the teams/segments within your organization (Enterprise, Commercial, SMB, etc.)

If one segment is out-pacing your plan in a meaningful way, this should prompt questions about where it makes sense to put more headcount and in what roles.

For example, if you are finding that a team that has more BDR support is tracking better against your plan, that may suggest tweaking your plan to hire another BDR as opposed to the planned AE.

Ideally, you should be able to compare these different headcount allocation scenarios quickly to see how the forecast may change for the rest of the fiscal year. This allows you to make decisions that are financially and strategically best for the business.

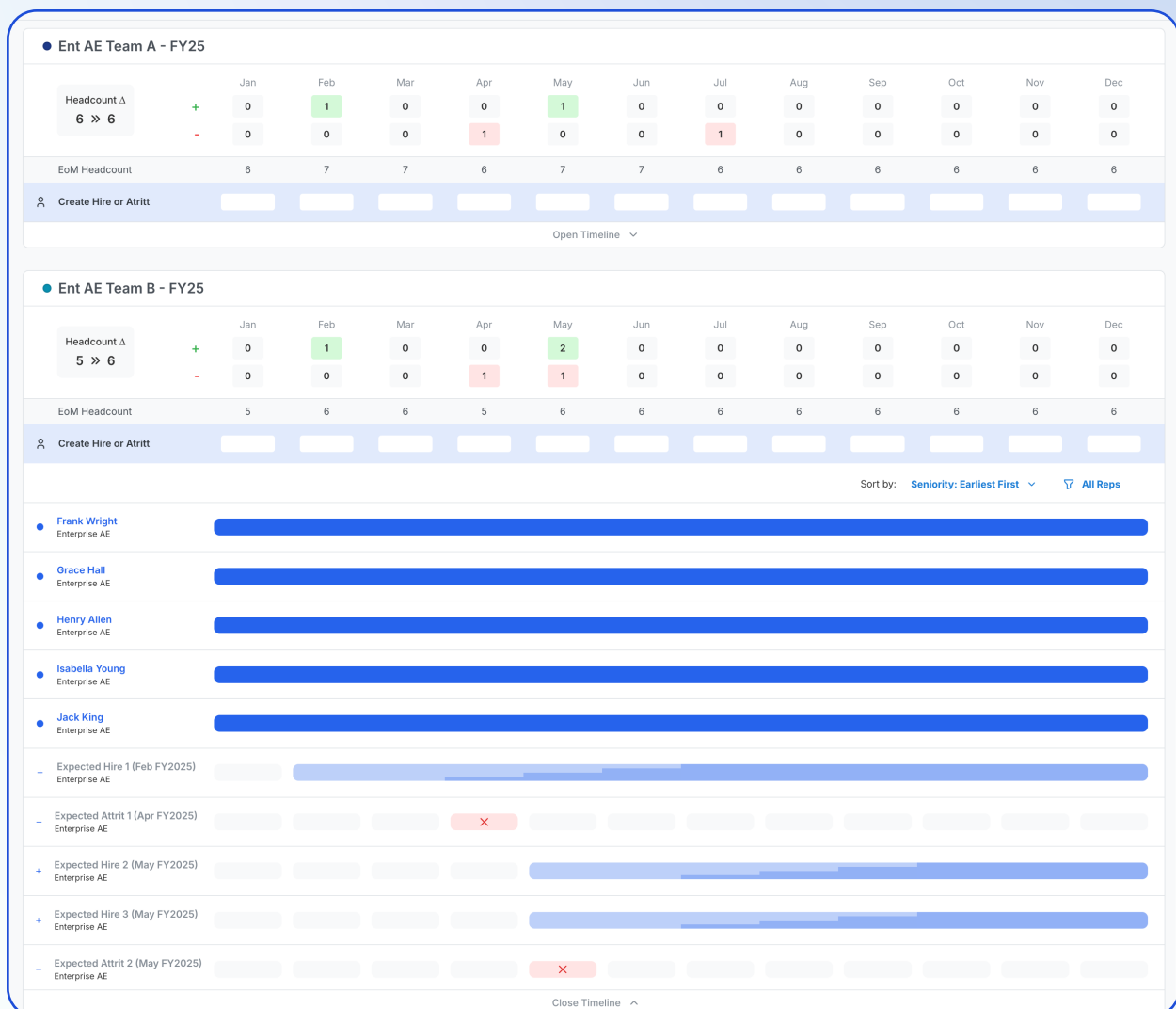


How Recast Helps

You can easily view in aggregate and in detail by team segments how performance is tracking in real time. Then in just a few clicks, you can model and compare different headcount allocation scenarios and see how each option impacts revenue and budget projections.

In your annual plan's budget, you can also view details on headcount by team segment, including their expected ramps. Once you have made decisions based on performance actuals, thanks to insights provided in real time by Recast, you can then quickly make headcount adjustments and re-publish your updated plan.

The screenshot below shows the annual plan headcount budget:



Are our ramp times on track or falling behind?

STAKEHOLDERS

CRO

Sales Enablement

Product Marketing

Sales Team Managers

Once you have those headcounts hired, there's an onboarding period before those team members are able to start hitting a target percentage of their quotas. That ramp period should be based on actual data and best-practice planning.

Unfortunately, ramp assumptions are often plugged in using a best-guess or a legacy *"that's the number we've always used"*; are generally applied across the teams and the fiscal year; and then only *loosely* tracked.

Instead, ramps for each individual should be tracked against quota attainment, so that you can spot and address any of these issues:

- Training and enablement taking too long
- Certain sales managers are behind others in ramping their team members
- Ramp times and plans need to be optimized for different sales teams or segments
- Seasonality, events, or other contributors are affecting ramps
- Ramps are happening faster than expected, costing us unnecessary commission coverage



How Revcast Helps

Revcast gives your plan a best-practice ramp model for building and monitoring your ramp periods, and then for easily adjusting those assumptions in your annual plan based on actual attainment (as seen in the screenshot from the previous section).

Revcast lets you track actual ramps in real time, by comparing hire dates to quota attainment. It alerts you to deviations from the expected ramps as those deviations emerge, so that you can address ramping risks or opportunities for current and future team members.

This improves overall accuracy in predicting your longer-term revenue outcomes, giving you more runway to adjust course. In the Revcast screenshot example below, you can track ramp actuals to attainment, by team over time, including monthly. From there, you can drill down into individual team and team member details.



Is enough pipeline being generated to cover our reps?

STAKEHOLDERS

CRO

Marketing

Business Development

Partnerships

Sales Team Managers

You need to assess how well pipeline is being generated for each individual, for each segment, and overall. This encompasses two main areas:

1. Sources of pipeline generated

2. Amount of pipeline generated

A common way to categorize sources of your pipeline includes: outbound prospecting (sales-driven); inbound (marketing); channel-driven (partners); and for some, product-led.

For nearly all companies, there will be some seasonality and choppiness to these numbers week-to-week. Major events or marketing programs, partner activities, and even time of year will each and all affect pipeline generation.

Such variances should be accounted for in a well-informed annual revenue plan and updated as notable investment or program changes are made during the year. Another important aspect of pipeline generation is whether the volume being generated is sufficient for each team member or segment.

That may include a look at volumes in excess of the capacity you currently have, which suggests adding or moving a headcount sooner than what's in the plan.

Here are some real world examples illustrating why it's important to stay on top of pipeline generation and coverage weekly:

- A marketing program investment planned for last quarter was postponed by two months, and we're seeing the effects on pipeline now.
- Partner-driven pipeline is falling short of the expected targets, which assumed a newer partner was going to drive more volume.
- Your company just wrapped up exhibiting at a sizable conference, and the prospect list you are bringing back is heavily weighted in a specific region or segment.
- You have team members out on vacation or on leave, leaving follow up from this week's new leads and new pipeline delayed due to staffing shortages.
- Hiring delays or attrition is leaving generated pipeline neglected.

Pipeline generation performance must also report from the same set of facts; Marketing should not have a story that differs from Sales and Partnerships. It's crucial to align on the KPIs and get everything centralized. Only then can you identify gaps where pipeline is lagging behind or over-performing, so that you can work as a total GTM team to adjust resources, timing, and investments.

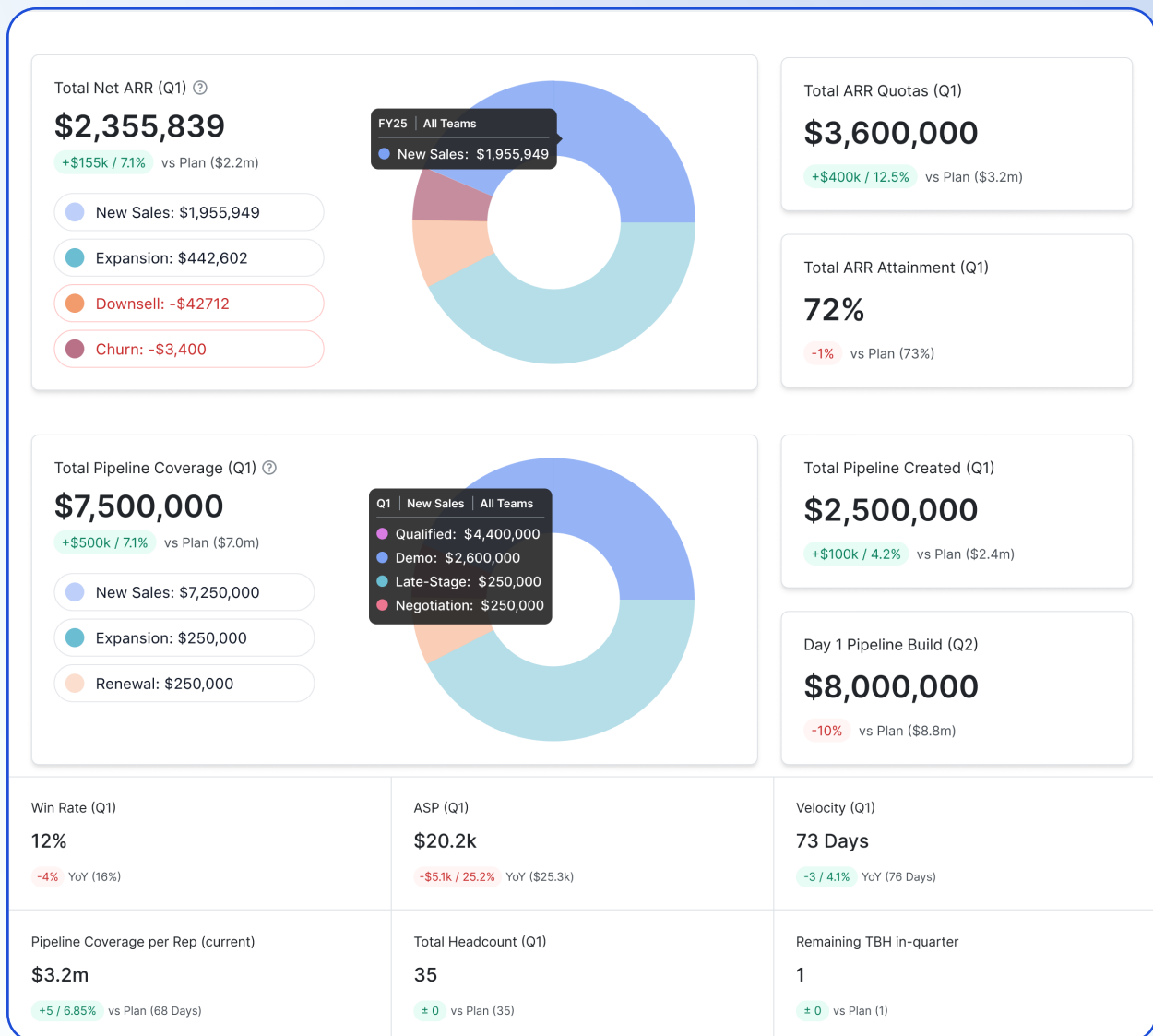


How Revcast Helps

Revcast gives everyone the visibility and alerts to a shared set of pipeline KPIs, so that actions can be taken faster. Pipeline analysis from different angles is accelerated with AI-powered recommendations.

You can automate a pipeline gap analysis, get instantly alerted on pipeline generation and coverage deviations, view pipeline actuals at a segment or individual level, and monitor your pipeline waterfall of how deals are moving through the pipeline.

In the full KPI Scorecard view in Revcast, you get easy-to-digest snapshots of what's happening with your pipeline coverage, pipeline coverage per rep, pipeline created, and day 1 pipeline building – all compared to plan. Each of these modules can be selected to drill down for more details:



Where are certain segments performing differently from plan and why?

STAKEHOLDERS

CRO

Sales Team Managers

Finance Analysts

CEO

When looking at any specific area of a revenue plan's ingredients – hiring, ramp times, pipeline, etc. – you should also be able to understand what's happening (and why) by segment, as we've shown through some examples already cited. Here's a fairly common model for organizing a team along segments, each being measurable and comparable:

Team Name	Team Roles
Enterprise / Global Accounts	Enterprise AEs, Enterprise SDRs
Mid Market / Commercial	Mid Market AEs, Mid Market SDRs
Partnerships / Channels	Partner Account Managers
Customer Success	CSMs
Marketing	Inbound BDRs

Sales teams may be either alternatively or additionally segmented along geographic lines (Enterprise in EMEA vs. North America) or by industry focus areas (Manufacturing, Public Sector, Banking & FinServ, etc.).

You may have an "AI" team or team role, if deploying AI SDR Agents. Another consideration is that certain products and/or solution offerings may be available to some segments vs. others, which may impact outcomes and future management decisions. It's important to regularly compare the performance of segments to the plan, to historic performance, as well as to each other and/or the average. Each segment should be actively measured and managed to make sure it's adequately yet efficiently resourced – and that deviations, whether positive or negative, are identified and addressed early.

Such situational awareness will help you:

- Determine if you're timing hires optimally for each segment, despite the original plan
- Optimize headcount allocations across all your segments
- React faster and smarter to deficits in training, resourcing, and pipeline-building
- Capitalize on positive trends and opportunities so you're not leaving revenue on the table

The practice of actively measuring each segment along revenue-building KPIs is especially crucial if you've recently introduced a new segment, re-organized or re-allocated headcount, or ramped up your hiring due to fundraising.

These insights will also be of high interest to the Finance team (and likely the CEO as well) due to headcount budget and timing.



How Recast Helps

Recast makes it easy to automatically view and act based on segment-specific performance. Reports are easily converted to team-based views and compared against your plan. Alerts can pinpoint deviations at the segment or even team member level. And our AI automatically delivers context and recommendations by rapidly analyzing and comparing options available to you.

In the screenshot below, you can see monthly views by roles (based on how you define those roles) with current actuals vs. projected revenue, with a calculation of the difference.

Budget Projected Revenue Table										
Per-team breakdown of projected revenue throughout the year. This projection is based on your sales quota capacity and headcount plan, including ramp and attainment expectations.										
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
Ent AE Team B (Projected)	\$0	\$439K	\$110K	\$94K	\$285K	\$285K	\$354K	\$394K	\$433K	\$49
Ent AE Team B (Actual)	\$0	\$439K	\$110K	\$94K	\$0	-	-	-	-	-
Ent AE Team B (+/-)	\$0	\$0	\$0	\$0	-\$285K	-	-	-	-	-
MM AE Team A (Projected)	\$295K	\$256K	\$141K	\$204K	\$178K	\$178K	\$197K	\$197K	\$197K	\$20
MM AE Team A (Actual)	\$295K	\$256K	\$141K	\$204K	\$32K	-	-	-	-	-
MM AE Team A (+/-)	\$0	\$0	\$0	\$0	-\$146K	-	-	-	-	-
Ent AE Team A (Projected)	\$345K	\$109K	\$108K	\$200K	\$285K	\$285K	\$335K	\$354K	\$374K	\$41
Ent AE Team A (Actual)	\$345K	\$109K	\$108K	\$200K	\$0	-	-	-	-	-
Ent AE Team A (+/-)	\$0	\$0	\$0	\$0	-\$285K	-	-	-	-	-
MM AE Team B (Projected)	\$139K	\$203K	\$174K	\$33K	\$223K	\$223K	\$246K	\$246K	\$246K	\$25
MM AE Team B (Actual)	\$139K	\$203K	\$174K	\$33K	\$89K	-	-	-	-	-
MM AE Team B (+/-)	\$0	\$0	\$0	\$0	-\$134K	-	-	-	-	-
Ent BDR Team (Projected)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Ent BDR Team (Actual)	\$0	\$0	\$0	\$0	\$0	-	-	-	-	-
Ent BDR Team (+/-)	\$0	\$0	\$0	\$0	\$0	-	-	-	-	-
MM BDR Team (Projected)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
MM BDR Team (Actual)	\$0	\$0	\$0	\$0	\$0	-	-	-	-	-
MM BDR Team (+/-)	\$0	\$0	\$0	\$0	\$0	-	-	-	-	-
Total Projected Revenue	\$780K	\$1M	\$531K	\$530K	\$971K	\$971K	\$1.1M	\$1.2M	\$1.3M	\$1.4
Total Revenue	\$780K	\$1M	\$531K	\$530K	\$121K	-	-	-	-	-
Total Projected Cost	\$485K	\$485K	\$495K	\$446K	\$520K	\$520K	\$520K	\$520K	\$520K	\$52
Cost To Revenue Ratio	0.62	0.48	0.93	0.84	0.54	0.54	0.46	0.44	0.42	0.38



How is quota-on-the-street attainment looking?

STAKEHOLDERS

CRO

Sales Team Managers

Finance Analysts

CEO

Quota attainment isn't just measured once your reps are fully ramped; it must be continuously measured against both ramping and fully ramped expectations over time.

Let's start with the ramping period phase. You should set measurable ramp targets, then confirm attainment at consistent intervals to identify precisely when reps transition from ramping to full productivity.

Tracking quota attainment during the ramp period is critical, because it provides valuable insights into the onboarding timeline for new sales reps. It highlights specific areas in your onboarding process that may require improvement. Addressing these issues can significantly accelerate the time to productivity, positively impacting overall revenue performance.

From there, tracking fully-ramped reps is essential not only for identifying risks and opportunities but also for validating core performance assumptions that significantly influence your revenue model. Consistent measurement helps challenge or confirm assumptions related to productivity benchmarks, quota attainability, and overall sales effectiveness, directly affecting forecast accuracy and strategic decision-making.

Historical data is essential for benchmarking true quota attainment performance. If your organization lacks this data, it's critical to start tracking immediately. (Without historical benchmarks, forecasting becomes guesswork.) Good plans factor in consistency and predictability in attainment, accounting for seasonal or cyclical variance.

Regularly monitoring your trending quota attainment performance allows revenue leaders to identify early warning signs that attainment is slipping, prompting proactive interventions. And it helps pinpoint high-performing employees, teams, regions, etc., which allows revenue leaders to replicate winning behaviors and practices across teams.



How Revcast Helps

Revcast provides automated tracking of individual and team attainment, comparing actual performance to historical trends and quota assumptions. The platform proactively alerts stakeholders to attainment risks, enabling quick scenario modeling to explore adjustments in real-time.

In the Revcast screenshot below, you can see how easy it is to visualize actual street quota capacity by segment vs. what was in your plan and how that impacts the forecast over time. And then you can stack that alongside a report showing the attainment actuals. These views can be tagged by month or by quarter, with further filtering options for display.



How is our closing performance tracking, in terms of velocity, win rate, and ASP?

STAKEHOLDERS

CRO

Sales Team Managers

Finance Analysts

CEO

Board of Directors

Closing performance isn't just about whether deals close, but how quickly, how often, and at what value. It's important to regularly review your pipeline waterfall and conduct gap analyses to identify exactly where deals stall or accelerate. By segmenting this analysis by team, product, or pipeline source, you gain precise visibility into your closing efficiency.

Here are some key reasons why looking weekly at these areas is highly beneficial to your revenue predictability – and ultimately achievement:

- Monitoring changes in deal velocity by segment provides essential insights into pipeline health.
- A slowdown in velocity often signals bottlenecks that, if resolved quickly, could unlock significant revenue.
- Tracking win rates against your plan reveals if your strategy aligns with actual market dynamics. Understanding these dynamics ensures the team is neither overly optimistic nor overly cautious about revenue forecasts.

Average Sales Price (ASP) should also be closely monitored for signs it's trending upwards, stagnating, or declining. Examining this data by segment and pipeline source can reveal valuable insights — for instance, are marketing-sourced deals bringing higher ASP but lower velocity?

The insights you gain from this data helps you think through going-forward strategies at the segment level and respond much sooner as trends emerge. For example, a rising ASP paired with slower velocity might be acceptable for Enterprise deals, but problematic for SMB. Likewise, higher win rates with lower ASP require an assessment of the volume vs. value trade-offs to maximize overall revenue.



How Revcast Helps

As you already saw in the screenshots of the Insights Dashboard and full KPI Scorecard, Revcast automatically analyzes closing performance across velocity, win rate, and ASP – highlighting deviations from the plan in real-time.

In the screenshot example below, you see two additional reports that can be reviewed each week to get a great view into pipeline progression over time: The Pipeline Waterfall and Pipeline Waterfall Gap Analysis.

Month Created	Total Created	Won YTD	Lost YTD	Open YTD	Monthly Counts									
					Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
Feb	47	3	40	4	3	15	3	0	4	2	5	1	2	0
Mar	75	5	66	4		2	17	6	9	7	2	6	2	1
Apr	77	5	69	3			2	21	17	11	4	2	4	2
May	80	8	69	3				16	27	13	4	5	6	3
Jun	56	4	46	6					8	10	8	8	4	5
Jul	64	3	58	3						1	11	11	6	8
Aug	57	4	50	3							7	7	18	10
Sep	49	5	32	12								4	11	7
Oct	123	5	99	19									24	36
Nov	47	2	33	12										11
Dec	31	2	15	14										
Jan	28	0	9	19										

Pipeline Waterfall Gap Analysis
Gap analysis of your existing pipeline based on future needs and past Waterfall performance.

Next Q Day-1 Pipeline Targets to hit Revenue Target of **\$800,000**

Stage	Day-1 Build Need	Current Day-1 Build	Gap to Day-1 Need	Past Win Rate in-Period	Past % of Sales from S...	Projected Closed-Won...	Needed Closed-Won fr...	Revenue Impact from ...
1 - Discovery	\$0	\$1,280,000	\$1,280,000	0.0%	0.0%	\$0	\$0	\$0
2 - Qualification	\$409,524	\$765,000	\$355,476	7.8%	15.1%	\$121,147	\$121,147	-\$5,300
3 - Solution	\$1,135,984	\$325,000	-\$810,984	36.3%	25.6%	\$83,139	\$204,650	-\$207,500
4 - Proposal	\$0	\$0	\$0	0.0%	0.0%	\$0	\$0	\$0
5 - Negotiation	\$0	\$0	\$0	0.0%	0.0%	\$0	\$0	\$0
Total	\$1,545,508	\$2,370,000	\$824,492	8.8%	40.7%	\$198,985	\$325,796	-\$126,811



Wrapping It All Together: A More Impactful Weekly Cadence for Revenue Leaders

Revenue leadership today requires more than reacting to the latest forecast miss or rallying the team after a tough quarter. It means building — and running — a system that continuously measures the health of your entire GTM engine, not just the outputs. That's why the seven questions outlined in this manual aren't just operational checkpoints. They're the weekly pulse-checks that give CROs early signals — signals that allow you to steer the ship proactively instead of reactively. By folding these questions into your weekly operating rhythm, you gain something most revenue teams lack: a way to keep your annual revenue plan alive, relevant, and adaptable in real time.

Each question helps you get ahead of:

- Hiring and attrition blind spots that quietly impact pipeline and revenue months down the line
- Inefficient headcount allocations that limit performance or inflate cost
- Ramping problems that go unnoticed until attainment lags
- Pipeline generation gaps that stem from marketing, outbound, or partnerships misalignment
- Segment-level underperformance that needs timely course correction
- Quota attainment patterns that signal whether you're trending above or below expectations
- Closing performance changes that impact forecast accuracy and strategic decision-making

In short: These questions give you visibility into the leading indicators that create your eventual revenue outcomes. The Revcast solution was built to purposefully address this opportunity for revenue leaders, giving them a real-time revenue plan operation system. The focus is no longer on the pains of gathering, reconciling, formatting, and studying data in spreadsheets – but instead on getting the fast alerting, analysis, and recommendations so you can make decisions about your GTM path forward.

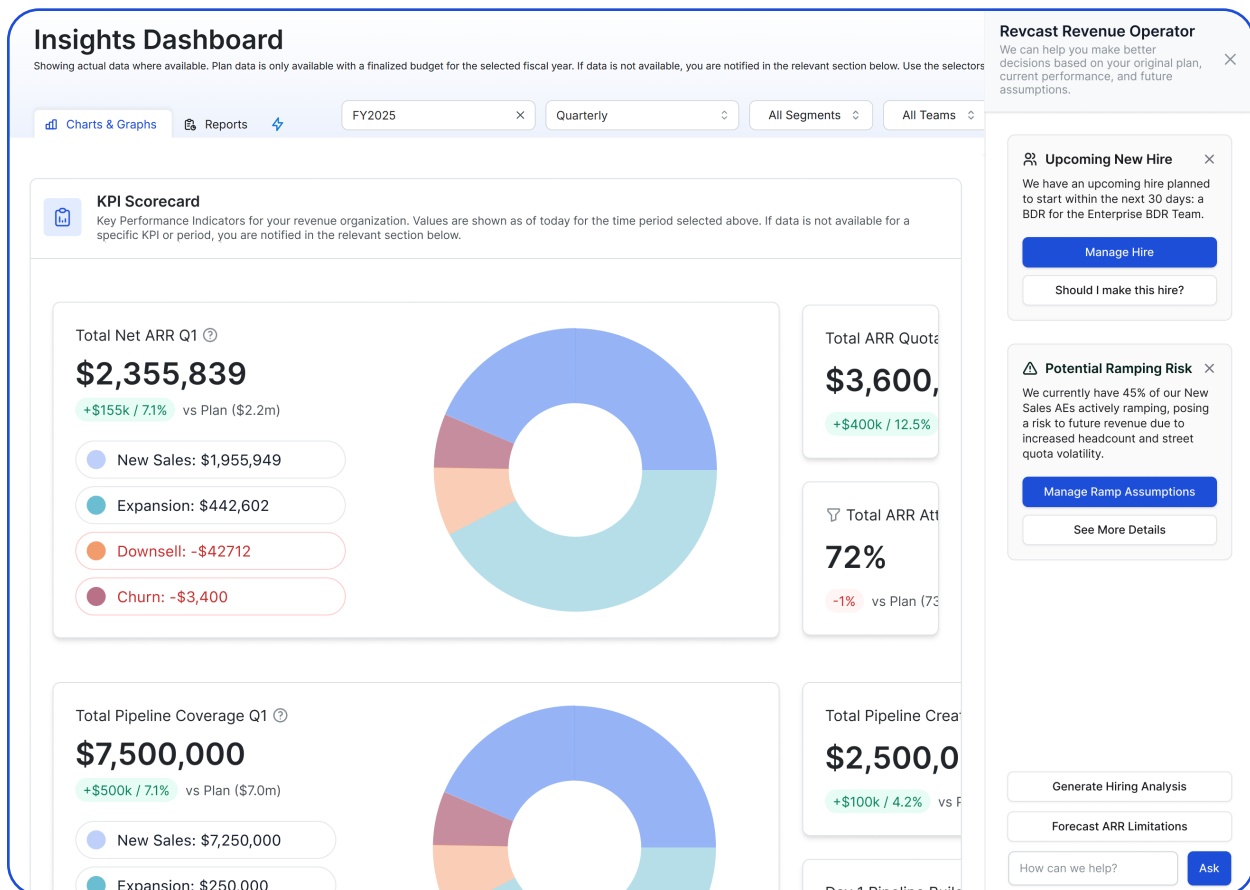
Whether you use Revcast or another approach, building this into your team's weekly routine ***changes the game***. You can get ahead of risks sooner, align cross-functional teams around a single version of truth, and lead with greater confidence in your numbers.

After all, the role of the CRO is no longer just about sales leadership. It's about revenue orchestration and efficient growth — and that demands operational excellence, agility, and insight that goes far beyond the forecast call.



Revcast: Your Revenue Plan Operator

Just like a navigational GPS, you're getting real-time data to find the best, most efficient route to get to your revenue target destination. That includes alerts (see right-hand sidebar in the screenshot below) about what's coming up or new risks or opportunities that deserve your attention. Interact with Revcast's AI to understand what's happening and to get recommendations on what to do next.



We hope you enjoyed this resource!

Ready to see how Revcast give you the confidence to reach your revenue target?
Schedule a 1:1 demo at revcast.com/get-a-demo to see what the solution can do using your own data.

www.revcast.com/get-a-demo

