

33 GTM Ready Prompts for B2B Revenue Teams



The Revenue Room™ AI Prompt Handbook

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Introduction

This handbook contains 33 prompts across 7 use-case categories designed for B2B revenue teams: Account Research, Opportunity Risk, Renewal Risk, Pipeline Review, Expansion, Coaching, and RevOps Governance.

Each prompt is built to be practical in real workflows. You'll see the inputs required, the exact prompt text to copy, the expected output format, and a pro tip from practice so you can apply the output immediately in your operating rhythm.

All prompts run in ChatGPT, Claude, and Microsoft Copilot as a baseline, and they also work in any AI-enabled revenue platform where you can paste structured inputs and prompts. Some prompts can be enhanced by tools that connect directly to CRM, conversation intelligence, or customer success data, but the core playbook does not depend on any single vendor.

Use these prompts as starting points—not finished deliverables. The value is speed and consistency: faster research, clearer risk detection, more structured pipeline reviews, and more evidence-based coaching—while keeping human judgment and customer context in the loop.

How to Use This Playbook

Each prompt in this handbook follows the same structure. Use the table below to understand what each field is telling you and how to apply it consistently.

Field	What It Tells You
Revenue Motion	Which revenue motion (New Business, Expansion, Retention) the prompt supports. Some prompts serve multiple motions.
Tools	Where the prompt runs most effectively. All prompts work in ChatGPT, Claude, and Copilot; some also pair well with platforms like Gong, Clari, or Gainsight.
When to Use	The trigger moment in the workflow when the prompt should be run (ideally tied to a defined cadence).
Context Inputs	The data you need before running the prompt. Missing inputs produce generic outputs; CRM-dependent prompts require populated fields.
The Prompt	The exact text to copy into your AI tool. Replace every bracketed field with your data before running.
Output Format	What the AI will return and how to use it (e.g., a table, a brief, a five-part structure). Review before customer-facing use.
Pro Tip	A practice-based recommendation to improve output quality and integrate the prompt into the operating workflow.

Three Rules for Success

1. **Replace every bracketed field.** Prompts with placeholders left in produce outputs that reference your placeholder text rather than your actual data. AI tools are literal—they process what they are given.
2. **Always review before using.** AI outputs are starting points. A risk summary that mischaracterizes a deal, a coaching brief based on inaccurate activity data, or a renewal narrative that contradicts the customer's experience will damage trust faster than no AI at all.

Embed prompts in your operating cadence. The highest-value use of these prompts is as a repeatable part of a weekly workflow—not a one-time experiment. Define when each prompt runs, who runs it, and where the output goes.



Section 1: Account Research & ICP

Qualification

These prompts replace the hours sellers spend on manual research before first outreach. Each prompt is designed to be run once per target account and the outputs stored in the CRM record so the intelligence is available to the entire team—not just the seller who built it.

Prompt 1.1: Company Intelligence Brief

Revenue Motion: New Business

Tools: ChatGPT, Claude, Copilot, Perplexity

When to Use: Before first outreach to a net-new target account. Run once and store in CRM.

Context Inputs Required: Company name, website URL, any known context about the

account from your team.

The Prompt:

Research [Company Name] as a prospective account for [Your Organization Name]. Summarize the following in clearly labeled sections: 1. What the company does and who it serves 2. How it likely generates revenue — identify all revenue streams including events, sponsorship, advertising, data, subscriptions, memberships, or content 3. The company's primary audience and customer segments 4. Recent business signals: executive changes, acquisitions, new products, funding, or market expansion 5. Current technology stack or digital maturity signals, if available 6. Why this company may be receptive to a conversation about [your value proposition or product category] Keep the summary to 400 words or fewer. Use plain language. Do not speculate beyond available evidence.

Expected Output Format: Six labeled sections, max 400 words. Designed to be pasted directly into a CRM record or shared with the account team in a pre-call brief.

Pro Tip: Add your organization's name and a one-line value proposition description to anchor the final section to your specific use case. Generic research prompts produce generic output.

Prompt 1.2: ICP Fit Score

Revenue Motion: New Business

Tools: ChatGPT, Claude, Copilot

When to Use: After the company intelligence brief. Use to prioritize which accounts to sequence first.

Context Inputs Required: Your defined ICP criteria (industry, revenue model, size, pain point profile) and the company intelligence brief output.

The Prompt:

Score [Company Name] against the following Ideal Customer Profile criteria: ICP Definition: [Paste your ICP definition here — include industry, company type, revenue model, estimated size, and the pain points or goals your product addresses] Using the company information below, evaluate fit on each of these dimensions: - Industry and business model alignment (0-25 points) - Revenue model complexity and match to our use case (0-25 points) - Likely pain point alignment based on available signals (0-25 points) - Organizational maturity and likely buying readiness (0-25 points) Company information: [Paste company intelligence brief] Provide a total score out of 100, a fit rating of High (75+), Medium (50-74), or Low (below 50), and a two-sentence explanation of the primary reason for the score.

Expected Output Format: Numeric score, fit rating label, and two-sentence rationale. Append to the CRM record alongside the company brief.

Pro Tip: Define your ICP criteria once as a reusable block and paste it into this prompt each time. Inconsistent ICP definitions produce inconsistent scores that cannot be compared across accounts.

Prompt 1.3: Buying Committee Map

Revenue Motion: New Business

Tools: ChatGPT, Claude, Copilot, LinkedIn Sales Navigator

When to Use: Once ICP fit is confirmed as Medium or High. Before building the outreach sequence.

Context Inputs Required: Company name, your product category, and the roles your solution typically involves in a buying decision.

The Prompt:

Identify the likely buying committee at [Company Name] for a purchase decision related to [product category or solution type]. For each of the following roles — CEO, COO, CRO or Chief Revenue Officer, CMO, CFO, CDO or Chief Data Officer, Head of Revenue Operations — provide: 1. Whether this role is likely to exist at this company given its size and business

model 2. Their likely priorities and concerns related to [your solution category] 3. The message angle most likely to resonate with them 4. Whether they are likely an economic buyer, a champion, an influencer, or a blocker in this type of decision Format as a table with columns: Role | Exists | Priorities | Message Angle | Buying Role.

Expected Output Format: Formatted table with five columns. Use to build multi-threaded outreach sequences and identify where executive alignment is needed.

Pro Tip: Update the role list to match the specific buying committee structure for your organization's typical deal. Add or remove roles based on your average deal size and sales cycle.

Prompt 1.4: Personalized Outreach Draft

Revenue Motion: New Business

Tools: ChatGPT, Claude, Copilot, Outreach, Salesloft

When to Use: After the buying committee map is complete. Personalize for each role in the sequence.

Context Inputs Required: Stakeholder name, title, any known recent activity (conference talk, LinkedIn post, press release), company intelligence brief, ICP fit score.

The Prompt:

Draft a short executive outreach email from [Seller Name] at [Your Organization] to [Stakeholder Name], [Title] at [Company Name]. Requirements: - Open with a specific, relevant observation about [Company Name] or the stakeholder's role — not a generic compliment - Connect that observation to a revenue performance challenge or opportunity that [Your Organization] addresses - State clearly what [Your Organization] does in one sentence — no jargon - Propose a specific, low-commitment next step (15-minute call, short demo, or specific question) - Total length: 120 words or fewer - Do not use phrases like: "I hope this email finds you well," "I wanted to reach out," "game-changing," or "revolutionary" Relevant context about [Company Name]: [Paste 2-3 key facts from company brief] Recent signal or trigger (if available): [Paste signal — e.g., new hire, product launch, event attended]

Expected Output Format: Single email draft, 120 words or fewer, with subject line. Review

before sending. AI drafts require human review for tone and accuracy.

Pro Tip: Run a separate draft for each role in the buying committee. The same company intelligence brief feeds different angles for a CRO versus a CMO versus a CFO.



Section 2: Opportunity Risk Scoring

These prompts are designed to run weekly against open pipeline opportunities before the pipeline review meeting. The goal is to replace manager gut feel with documented evidence review—and to ensure every commit-category deal has a current risk assessment, not just a rep's verbal confidence.

Prompt 2.1: Opportunity Risk Summary

Revenue Motion: New Business, Expansion

Tools: ChatGPT, Claude, Gong, Salesforce Einstein, Clari

When to Use: Weekly, before the pipeline review meeting. Run for every opportunity above a defined dollar threshold.

Context Inputs Required: Opportunity stage, close date and any changes, deal amount, last activity date, number of stakeholders engaged, next step and due date, rep forecast category, any call or email summary notes.

The Prompt:

Review the following opportunity record and produce a risk assessment. Opportunity: [Opportunity Name] Stage: [Stage] | Close Date: [Date] | Close Date Changes: [Number of times pushed] Deal Amount: [Amount] | Forecast Category: [Commit / Best Case / Pipeline] Days in Current Stage: [X] days | Benchmark for This Stage: [Y] days Last Activity: [Date] | Last Buyer Response: [Date] Stakeholders Engaged: [Number and roles] | Economic Buyer Confirmed: [Yes/No] Next Step: [Description] | Next Step Due: [Date] Rep Confidence Notes: [Any notes from rep] Call / Email Summary (if available): [Paste or summarize] Evaluate and respond with: 1. Risk Score: Green (on track), Yellow (manager review needed), or Red (active risk — immediate action required) 2. Top 3 Risk Factors: Specific evidence-based reasons for the score 3. Confidence Assessment: Is the rep's

forecast category supported by documented evidence or based on optimism? 4.

Recommended Next Action: One specific action for the seller and one for the manager this week 5. Forecast Recommendation: Keep current category, move up, move down, remove, or requalify

Expected Output Format: Five-section structured output. Store the risk score, top risk factors, and recommended action in the CRM opportunity record before the pipeline meeting.

Pro Tip: Require that CRM records contain all input fields before this prompt can be run effectively. Poor data in produces unreliable risk scores out. CRM compliance and risk scoring are inseparable.

Illustrative Output Example — Review before use. AI outputs require human verification.

>> RISK SCORE: YELLOW — Manager Review Required

>> TOP 3 RISK FACTORS:

- a. Stage Aging: Opportunity has been in Stage 3 (Proposal Delivered) for 31 days against a benchmark of 18 days for this product line and deal size. The close date has been pushed once already.
- b. Single-Threaded Engagement: Only one contact — a Marketing Manager — is documented in the CRM. No economic buyer has been identified or engaged, and no other stakeholders appear in the activity log.
- c. Weak Next Step: The documented next step is "follow up next week," with no buyer commitment, no specific meeting scheduled, and no mutual action plan on file.

>> CONFIDENCE ASSESSMENT: The rep has this deal in Commit at \$48,000. The evidence does not support Commit. There is no confirmed economic buyer, the deal is past stage benchmark, and the next step lacks specificity. This appears to reflect seller optimism rather than documented buyer intent.

>> RECOMMENDED NEXT ACTION: Seller — Within 3 business days, identify and request a meeting with the economic buyer. Do not send another follow-up to the Marketing Manager without a specific ask attached. Manager — In this week's 1:1, ask the seller to

name the economic buyer and explain how they plan to get into that conversation before the close date.

>> FORECAST RECOMMENDATION: Move from Commit to Best Case until economic buyer is confirmed and a documented mutual next step is in place with a specific date.

Prompt 2.2: Stage Aging Analysis

Revenue Motion: New Business, Expansion

Tools: ChatGPT, Claude, Clari, Salesforce Einstein

When to Use: When an opportunity has been in the same stage for longer than the benchmark for that stage. Run before pipeline review or 1:1 coaching conversations.

Context Inputs Required: Opportunity name, current stage, days in stage, benchmark days for this stage, last buyer action, last seller action, next step status.

The Prompt:

Analyze the following stalled opportunity and provide a stage aging assessment.
Opportunity: [Opportunity Name] | Current Stage: [Stage Name] Days in Current Stage: [X days] | Benchmark for This Stage: [Y days] Overage: [X minus Y] days past benchmark Last Buyer Action: [Description and date] Last Seller Action: [Description and date] Next Step Documented: [Yes/No — if yes, describe] Economic Buyer Engaged: [Yes/No] Based on this information: 1. Classify the stall: Is this a buyer-side delay, a seller-side delay, a qualification gap, or a competitive displacement signal? 2. Identify the most likely root cause with supporting evidence from the record 3. Recommend a specific intervention: What should the seller do in the next 5 business days to either advance the deal or qualify it out? 4. Assess whether this deal should remain in the forecast at its current value and category, given the stage overage

Expected Output Format: Four-section response identifying stall type, root cause, intervention, and forecast recommendation. Use in the 1:1 coaching agenda as the basis for a deal strategy conversation.

Pro Tip: Define stage benchmarks from your actual historical CRM data before using this prompt. Industry benchmarks are not reliable substitutes for your own conversion data by product line and deal size.

Prompt 2.3: Stakeholder Risk Assessment

Revenue Motion: New Business, Expansion, Retention

Tools: ChatGPT, Claude, Gong, LinkedIn Sales Navigator

When to Use: When a deal is approaching a stage transition or entering the forecast at commit or best-case, and multi-threading status is unclear.

Context Inputs Required: List of contacts engaged on the deal, their roles, last interaction date for each, whether the economic buyer has been identified and engaged.

The Prompt:

Review the stakeholder engagement profile for the following opportunity and assess relationship risk. Opportunity: [Opportunity Name] | Stage: [Stage] | Deal Amount: [Amount] Stakeholders Currently Engaged: [List each contact: Name | Title | Last Interaction | Interaction Type (call, email, meeting)] Economic Buyer Identified: [Yes/No] | If yes: [Name and Title] Economic Buyer Last Engaged: [Date and context] Based on this information: 1. Classify threading status: Single-threaded, partially multi-threaded, or fully multi-threaded 2. Identify the highest-priority stakeholder gap — which role is missing that creates the most risk for this deal? 3. Assess whether the economic buyer is sufficiently engaged given the deal stage and close date 4. Recommend two specific actions to improve stakeholder coverage before the next pipeline review

Expected Output Format: Four-part structured response. Append the threading classification and highest-priority gap to the CRM opportunity record.

Pro Tip: Run this prompt for every deal entering commit category. Single-threaded commit deals are the most common source of late-quarter forecast miss and should require explicit management acknowledgment.

Prompt 2.4: Manager Coaching Questions for Pipeline Review

Revenue Motion: New Business, Expansion

Tools: ChatGPT, Claude, Copilot

When to Use: Before a 1:1 pipeline review or deal strategy session. Use to prepare evidence-based coaching questions rather than generic deal status questions.

Context Inputs Required: Opportunity risk summary output (from Prompt 2.1), or key deal facts: stage, days in stage, stakeholder coverage, last buyer action, forecast category.

The Prompt:

Generate five specific coaching questions for a manager to ask a seller about the following opportunity in a pipeline review or 1:1 conversation. Opportunity: [Name] | Stage: [Stage] | Forecast Category: [Category] Key Risk Factors: [Paste from risk summary or describe]
Requirements for the questions: - Each question must be grounded in a specific piece of evidence or gap from the opportunity record - Questions should help the manager assess whether the deal is progressing based on buyer behavior or seller optimism - At least one question must address the economic buyer - At least one question must address the next step and timeline - At least one question must address competitive or budget risk - Do not ask questions that can be answered with "yes" or "no" Format: Number each question and include a one-sentence note explaining what evidence gap or risk factor it is probing.

Expected Output Format: Five numbered questions, each with a brief rationale. Use as the coaching agenda for the deal discussion—not as a script to read verbatim.

Pro Tip: Share these questions with the seller 24 hours before the 1:1. Sellers who know what evidence they need to bring prepare more thoroughly and arrive with better answers—which produces a more useful conversation.



Section 3: Renewal Risk and Retention

These prompts are built for Customer Success Managers, Account Managers, and revenue leaders managing recurring revenue. The goal is proactive retention: move risk detection from 30 days before renewal to 90–180 days before—when intervention can still change the outcome.

Prompt 3.1: Renewal Risk Brief

Revenue Motion: Retention

Tools: ChatGPT, Claude, Gainsight, ChurnZero, Salesforce

When to Use: Monthly for all accounts with renewal dates within 180 days. Weekly for accounts with two or more active risk signals.

Context Inputs Required: Account name, renewal date, current contract value, campaign performance vs. guarantee, engagement activity in last 60 days, stakeholder changes, support ticket history, last CSM conversation notes, NPS or CSAT score if available.

The Prompt:

Generate a renewal risk brief for the following account. Account: [Account Name] | Renewal Date: [Date] | Current Contract Value: [\$] Days to Renewal: [X] | CSM Owner: [Name] Campaign Performance: - Contracted guarantee: [Metric and target] - Current delivery: [Current metric] - Performance vs. guarantee: [% of target achieved] Engagement Signals (last 60 days): - Email / content engagement: [Level — high / medium / low / none] - Event attendance: [Yes/No and details] - Stakeholder activity: [Number and roles engaging] - Support tickets: [Number and severity] Stakeholder Changes: [Any new or departed contacts] NPS / CSAT Score: [If available] Last CSM Conversation: [Date and key themes] Provide: 1. Risk Rating: Green (renewal likely), Yellow (risk present — proactive action needed), or Red (at risk — escalation required) 2. Primary Risk Driver: The single most important factor explaining the risk rating 3. Secondary Risk Factors: Up to two additional contributing signals 4. Recommended Intervention: Specific action steps for the CSM and Account Manager in the next 14 days 5. Escalation Trigger: At what point should sales leadership or an executive be brought into the renewal conversation?

Expected Output Format: Five-section structured brief. Store in CRM account record and share with the account team before the weekly renewal review meeting.

Pro Tip: Campaign performance against guarantee is the highest-weight input for this prompt. If campaign data is not available or not being tracked at the account level, that gap must be addressed before the prompt can produce reliable risk assessments.

Illustrative Output Example — Review before use. AI outputs require human verification.

>> RISK RATING: RED — Escalation Required

>> PRIMARY RISK DRIVER: Campaign Underperformance The Q3 demand generation campaign has delivered 41% of its contracted lead guarantee with 7 weeks remaining in the program. At current delivery velocity, projected completion is 58% of guarantee. Based on historical data, campaigns delivering below 65% of guarantee at this stage have a renewal rate of 34% — compared to 81% for campaigns above 80% of guarantee.

>> SECONDARY RISK FACTORS:

- a. Stakeholder Disengagement: The primary contact (VP Marketing) last responded to a CSM outreach 47 days ago. A new CMO joined the account 6 weeks ago and has not been introduced to the account team.
- b. Renewal Window: Contract expires in 94 days. No renewal conversation has been initiated and no value review is scheduled. At 94 days, this is already inside the minimum intervention window for accounts with active delivery issues.

>> RECOMMENDED INTERVENTION: CSM — Within 48 hours: Contact the VP Marketing with a specific campaign performance update and a proposed corrective action plan. Do not send a generic check-in. Account Manager — Within 7 days: Request an introduction to the new CMO through the VP Marketing. Frame as a strategic onboarding conversation, not a renewal discussion. Joint — Schedule a formal campaign performance review with both contacts within 14 days. Bring data and a specific remediation proposal.

>> ESCALATION TRIGGER: If no response is received from the VP Marketing within 5 business days, or if the CMO introduction is declined, escalate to VP Customer Success and CRO for executive outreach. Do not wait for the renewal date to drive the conversation.

Prompt 3.2: Value Realization Summary for QBR or EBR

Revenue Motion: Retention, Expansion

Tools: ChatGPT, Claude, Copilot, Tableau, Power BI

When to Use: Before every Quarterly Business Review or Executive Business Review. Replace manual report-building with this prompt and use the output as the basis for the customer-facing narrative.

Context Inputs Required: Account name, products purchased, campaign delivery data vs. benchmarks, engagement metrics, lead or pipeline outcomes generated, comparison to prior period, any expansion activity, customer goals stated at contract signing.

The Prompt:

Create a value realization summary for [Account Name] to be used in a Quarterly Business Review or Executive Business Review. Account: [Account Name] | Products / Programs: [List] | Period: [Q and Year] Delivery Performance: [For each product or campaign, provide: Metric | Contracted Target | Delivered | vs. Benchmark] Business Outcomes Generated (if tracked): - Leads or pipeline influenced: [Data] - Event attendance or engagement: [Data] - Content or brand reach: [Data] - Other agreed success metrics: [Data] Comparison to Prior Period: [Key changes vs. last period] Customer Goals at Contract Start: [What the customer said they wanted to achieve] Expansion or Upsell Activity This Period: [Any additional products purchased or in discussion] Write a value realization summary that: 1. Opens with a headline statement of overall performance against contracted commitments 2. Highlights two to three specific outcomes that demonstrate delivered value 3. Acknowledges any delivery gaps honestly and frames the improvement plan 4. Connects performance to the customer's stated business goals 5. Closes with a forward-looking statement identifying the next opportunity or next step Write for an executive audience. Use plain language. Avoid internal jargon. Length: 300 words.

Expected Output Format: Executive-ready narrative of 300 words, structured in five sections. Review and personalize before using in the actual QBR. AI drafts should always be reviewed for accuracy against the actual data.

Pro Tip: The section that acknowledges delivery gaps is the most important one to personalize. Generic or defensive language about underperformance is a top reason customers disengage in QBRs. Specific, consultative framing of what happened and what changes next builds more trust than a perfect-performance summary.

Prompt 3.3: Save Play Recommendation

Revenue Motion: Retention

Tools: ChatGPT, Claude, Gainsight, ChurnZero, or other customer data platform

When to Use: Immediately when an account is rated Red in the renewal risk brief, or when a CSM flags an account as at risk outside the normal review cycle.

Context Inputs Required: Renewal risk brief output, account history, current stakeholder contacts and their seniority, prior renewal history, any stated customer concerns or objections.

The Prompt:

An account has been flagged as at risk of non-renewal. Recommend a save play. Account: [Account Name] | Contract Value: [\$] | Days to Renewal: [X] Risk Rating: Red | Primary Risk Driver: [From renewal risk brief] Account History: - Years as customer: [X] - Prior renewal history: [Renewed / reduced / had issues] - Relationship strength: [Strong / medium / weak — with whom] - Prior escalations or issues: [Any history] Current Stakeholder Contacts: [List key contacts, their roles, and last interaction] Known Customer Concerns or Objections: [Any stated concerns] Current Campaign or Delivery Status: [Summary] Recommend a structured save play that includes: 1. Immediate Action (within 48 hours): One specific outreach action by the CSM 2. Escalation Step (within 7 days): Whether and how to bring in sales leadership or executive sponsorship — and who specifically 3. Value Recovery Play: What evidence or outcome data to present that most directly addresses the primary risk driver 4. Commercial Lever (if needed): Whether a pricing, packaging, or commitment adjustment should be considered and under what conditions 5. Walk-Away Criteria: What conditions would indicate that pursuing the renewal is unlikely to succeed, so the team can redirect resources

Expected Output Format: Five-step structured save play. Assign an owner and due date to each step. Log the plan in CRM and review progress at the next weekly renewal meeting.

Pro Tip: The walk-away criteria section is often skipped because it feels like giving up. It is the most strategically important section for resource allocation. Not every at-risk account is worth the same intervention investment.

Prompt 3.4: Customer Health Score Summary

Revenue Motion: Retention, Expansion

Tools: ChatGPT, Claude, Gainsight, Salesforce, HubSpot

When to Use: Monthly for all active accounts. Use to prepare the internal account health review and to identify which accounts need proactive CS attention before they surface as at-risk.

Context Inputs Required: Account engagement data across all available channels: campaign performance, email and content engagement, event attendance, product usage, support tickets, NPS or CSAT scores, stakeholder activity, contract value and tenure.

The Prompt:

Generate a customer health score summary for [Account Name]. Account: [Account Name] | Contract Value: [\$] | Tenure: [X years / months] Engagement Inputs (score each 1-5 where 5 is healthy): - Campaign performance vs. guarantee: [Score and brief note] - Email and content engagement frequency: [Score and brief note] - Event attendance or platform usage: [Score and brief note] - Stakeholder responsiveness: [Score and brief note] - Support ticket volume and severity: [Score and brief note] - NPS or CSAT trend: [Score and brief note] - Renewal intent signals: [Score and brief note — e.g., early renewal conversation, reference activity] Based on these inputs: 1. Calculate a composite health score (sum of scores out of 35 maximum, expressed as a percentage) 2. Assign a health tier: Green (80% or above), Yellow (55-79%), Red (below 55%) 3. Identify the two dimensions with the lowest scores and explain why they are the highest priority to address 4. Recommend one proactive action the CSM should take this month based on the health profile

Expected Output Format: Composite score, health tier, priority gap analysis, and one recommended action. Designed to feed the monthly account health review and renewal risk prioritization process.

Pro Tip: Adjust the input dimensions and their weighting to match your specific business model. A digital media company weights campaign performance highest. An events company weights event attendance and stakeholder engagement most heavily. A data subscription company weights product usage most.



Section 4: Pipeline Review and Forecasting

These prompts are designed for RevOps leaders and sales managers preparing for pipeline reviews and forecast calls. They replace manual deal status assembly with structured, evidence-based meeting preparation—and shift the pipeline review from a status report to a decision session.

Prompt 4.1: Pipeline Coverage Analysis

Revenue Motion: New Business, Expansion

Tools: ChatGPT, Claude, Clari, Salesforce, HubSpot

When to Use: Weekly, as preparation for the pipeline review meeting. Run before the meeting, not during it.

Context Inputs Required: Total pipeline value by stage, revenue target for the current period, historical conversion rates by stage, number of days remaining in the period.

The Prompt:

Analyze the following pipeline data and produce a coverage assessment. Revenue Target (Current Period): [\$] Days Remaining in Period: [X] Pipeline by Stage: Stage 1 — [Name]: [\$] total | [X] opportunities | Historical conversion to close: [%] Stage 2 — [Name]: [\$] total | [X] opportunities | Historical conversion to close: [%] Stage 3 — [Name]: [\$] total | [X] opportunities | Historical conversion to close: [%] Stage 4 — [Name]: [\$] total | [X] opportunities | Historical conversion to close: [%] Commit category: [\$] total | [X] opportunities Best case category: [\$] total | [X] opportunities Provide: 1. Raw coverage ratio (total pipeline divided by target) 2. Probability-weighted coverage ratio (apply stage conversion rates to each stage) 3. Coverage assessment: Healthy (3x or above), At Risk (2x to 2.9x), or Critical (below 2x) 4. Projected close based on current pipeline quality and days remaining 5. Sourcing gap: How much additional pipeline needs to be created to achieve 3x coverage, given current stage distribution 6. Top recommendation for the pipeline review agenda based on this analysis

Expected Output Format: Six-section analysis with numeric figures and a clear pipeline health verdict. Share with the sales manager and RevOps lead before the pipeline meeting as the opening context.

Pro Tip: Use your actual historical conversion rates by stage, not industry benchmarks. Run this analysis every week at the same time each Monday so the leadership team has a consistent

view before the week's meetings.

Prompt 4.2: Forecast Narrative for Leadership

Revenue Motion: New Business, Expansion, Retention

Tools: ChatGPT, Claude, Copilot, Clari

When to Use: Weekly before the revenue leadership meeting, and at month-end and quarter-end before the executive forecast call.

Context Inputs Required: Current forecast call by category (commit, best case, pipeline), prior week's forecast, variance from prior week and from target, key deals that changed category this week, any significant risks or upside events.

The Prompt:

Write a weekly revenue forecast narrative for the leadership team. Period: [Month / Quarter] | Target: [\$] | Days Remaining: [X] Current Forecast: - Commit: [\$] | Change from last week: [+/- \$] - Best Case: [\$] | Change from last week: [+/- \$] - Most Likely: [\$] (your assessed call) - Prior Week Most Likely: [\$] Key Deal Changes This Week: [List deals that moved category, closed, slipped, or were added — include deal name, value, and what changed] Primary Risks to Current Forecast: [List top 2-3 risks with deal names and estimated impact] Primary Upside Opportunities: [List top 1-2 deals that could close ahead of schedule or at higher value] Write a forecast narrative of 200 words or fewer that: 1. States the current call and how it compares to prior week and to target 2. Explains the two most significant changes since last week 3. Identifies the primary risk to the current call 4. States what needs to happen in the next 7 days to protect or improve the forecast 5. Uses direct, plain language — no hedging, no jargon

Expected Output Format: 200-word executive narrative structured in five points. Send to leadership before the Monday revenue meeting. The goal is to replace verbal updates with a written anchor that the team can respond to with decisions.

Pro Tip: Consistency of format is more important than length. A weekly forecast narrative that follows the same structure every week allows leadership to spot changes and patterns instantly. Changing the format each week forces re-reading rather than pattern recognition.

Prompt 4.3: Pipeline Review Agenda Builder

Revenue Motion: New Business, Expansion

Tools: ChatGPT, Claude, Copilot

When to Use: Before each weekly pipeline review meeting. Replace the free-form deal walk-through with a structured decision agenda.

Context Inputs Required: List of at-risk deals (Red and Yellow from risk scoring), commitment category deals with any recent changes, deals approaching stage transitions, and any deals where the rep and manager disagree on category.

The Prompt:

Build a structured pipeline review meeting agenda for [Team / Region / Segment]. Meeting Date: [Date] | Duration: [X minutes] Coverage Status: [Paste coverage ratio and assessment from Pipeline Coverage Analysis] At-Risk Deals (Red): [List deal name, value, days in stage, and primary risk factor for each] Yellow Deals Requiring Manager Attention: [List deal name, value, and risk factor for each] Commit Deals with Recent Changes: [List deal name, value, and what changed this week] Deals Approaching Stage Transition: [List deal name, current stage, and expected move] Build an agenda that: 1. Opens with a 3-minute coverage and forecast summary (no deal discussion) 2. Allocates time proportionally to deal value and risk level — highest-risk, highest-value deals get the most time 3. Frames each deal segment as a decision, not a status update: what decision needs to be made about this deal today? 4. Includes a close with 5 minutes for actions and owners 5. Total time should not exceed [X] minutes Format as a timed agenda table with columns: Time | Segment | Deals or Topic | Decision or Output Required

Expected Output Format: Timed agenda table. Distribute to the team 24 hours before the meeting so sellers prepare evidence rather than stories.

Pro Tip: The discipline of framing each deal as a decision rather than a status update is what separates a useful pipeline review from a time-consuming deal parade. Every deal discussion should end with a documented decision and an owner.

Prompt 4.4: Forecast vs. Actuals Debrief

Revenue Motion: New Business, Expansion, Retention

Tools: ChatGPT, Claude, Clari, Salesforce

When to Use: Within one week of each period close. Use to identify patterns in forecast variance before they repeat in the next period.

Context Inputs Required: Final forecast submitted at week 8 (or equivalent early checkpoint), actual closed revenue, deals that were forecast to close but did not, deals that closed but were not in the forecast, biggest variances by rep or segment.

The Prompt:

Analyze the following period forecast versus actuals and identify the root causes of variance. Period: [Month / Quarter] | Target: [\$] | Final Forecast (Week 8 equivalent): [\$] | Actual Closed: [\$] Total Variance: [\$] ([+/-]% of forecast) Deals Forecast to Close That Did Not: [List: Deal Name | Forecasted Value | Why It Did Not Close | Stage at Forecast Submission] Deals That Closed But Were Not in Forecast: [List: Deal Name | Value | Where It Was at Forecast Submission] Largest Variance by Rep or Segment: [List: Name / Segment | Forecasted | Actual | Variance] Analyze this data and identify: 1. The primary pattern in deals that slipped: Was it stage inflation, stakeholder gaps, poor qualification, external factors, or something else? 2. The primary source of positive variance (deals that closed above forecast): What signals or behaviors predicted their success? 3. Whether variance is concentrated in specific reps, segments, or deal types 4. Two specific changes to the forecasting process or stage definitions that would reduce variance in the next period 5. One coaching priority for the sales manager based on this analysis

Expected Output Format: Five-section debrief structured around root cause, not blame. Use in the post-period leadership review as the basis for process improvement decisions, not performance evaluation.

Pro Tip: The most valuable part of this analysis is identifying positive variance patterns—the deals that outperformed the forecast. Understanding what those sellers did differently is a more scalable improvement lever than analyzing why deals slipped.



Section 5: Expansion and White Space

Expansion revenue closes faster, costs less to acquire, and carries higher margin than new business. These prompts are designed for Account Managers and Customer Success leaders who are building a systematic expansion motion rather than waiting for customers to ask for

more. Expansion should be driven by data and timing—not by relationship instinct alone.

Prompt 5.1: White Space Analysis

Revenue Motion: Expansion

Tools: ChatGPT, Claude, Copilot, Salesforce, HubSpot

When to Use: Quarterly, during account planning. Run for every account in the top two tiers by contract value.

Context Inputs Required: Account name, current products or programs purchased, full product and service catalog, account industry and revenue model, any engagement signals related to products not yet purchased.

The Prompt:

Conduct a white space analysis for [Account Name] and identify expansion opportunities. Account: [Account Name] | Industry: [Industry] | Revenue Model: [Brief description] Current Contract Value: [\$] | Tenure: [X years] | Health Score: [If available] Products and Programs Currently Purchased: [List each product, program, or service the account currently buys from you] Full Product and Service Catalog Available: [List all products, programs, or services your organization offers] Engagement Signals (if available): [Any signals indicating interest in products not yet purchased: content consumed, events attended, stakeholder inquiries] For each product or service NOT currently purchased by this account: 1. Assess fit: High, Medium, or Low based on the account's industry, revenue model, and stated goals 2. Identify the strongest rationale for pursuing this product with this account 3. Suggest the best timing trigger: What event, milestone, or signal would indicate this account is ready for this conversation? 4. Recommend the right stakeholder to initiate the expansion discussion for each product Format as a table: Product / Service | Fit Rating | Rationale | Timing Trigger | Stakeholder

Expected Output Format: White space table for every product not currently purchased. Prioritize by fit rating and use as the agenda for the quarterly account planning session.

Pro Tip: Do not attempt to pursue all high-fit white space opportunities simultaneously. Use the timing trigger column to sequence expansion conversations so each one is opened at the moment of highest receptivity.

Prompt 5.2: Expansion Outreach Hypothesis

Revenue Motion: Expansion

Tools: ChatGPT, Claude, Copilot

When to Use: When a timing trigger has been identified and an expansion conversation needs to be initiated. Before first contact with the new stakeholder or before raising expansion in a renewal conversation.

Context Inputs Required: Account name, current products, the expansion product being proposed, the timing trigger that activated this conversation, the target stakeholder for the expansion discussion.

The Prompt:

Create an expansion outreach hypothesis for the following account and opportunity.
Account: [Account Name] Current Products: [List] Expansion Product Being Proposed: [Product Name] Timing Trigger: [What signal or event activated this conversation — e.g., campaign overperformance, new stakeholder hired, event attended] Target Stakeholder for This Conversation: [Name and Title] Account Health Status: [Green / Yellow / Red] Write a hypothesis that answers three questions: 1. Why now: Why is this the right moment to raise this expansion opportunity with this account? 2. Why this product: What specific outcome or gap for this customer does this product address, based on what you know about their business and goals? 3. Why this stakeholder: What is this person's likely priority and how does the proposed product connect to it? Keep the hypothesis to 150 words. This is internal preparation material, not a customer-facing document. Write it so any team member picking up this account can understand the expansion rationale immediately.

Expected Output Format: 150-word internal hypothesis. Store in the CRM account record and share with anyone involved in the expansion conversation. Use as the foundation for the outreach message.

Pro Tip: A well-articulated expansion hypothesis prevents the most common expansion failure: leading with product features rather than with the customer's specific business need. The hypothesis forces the team to answer “why should they care” before “here is what we sell.”



Section 6: Coaching and Team Performance

These prompts are built for sales managers, CS managers, and revenue leaders who want to move coaching from subjective conversation to evidence-based development. AI does not replace the judgment of a good manager. It gives that manager the specific, documented evidence they need to have better conversations more consistently across every rep.

Prompt 6.1: Weekly Rep Performance Brief

Revenue Motion: New Business, Expansion, Retention

Tools: ChatGPT, Claude, Gong, Salesforce, Clari

When to Use: Weekly, before the manager's 1:1 with each rep. Generated from CRM and activity data, not from rep self-reporting.

Context Inputs Required: Rep name, pipeline value and changes this week, deals that advanced or stalled, activity metrics (calls, emails, meetings), CRM compliance status, forecast category changes, any call recording highlights if available.

The Prompt:

Generate a weekly performance brief for [Rep Name] to prepare a manager for a 1:1 coaching conversation. Rep: [Name] | Territory / Segment: [Description] | Quota: [\$] | Period Target: [\$] Pipeline Value (Current): [\$] | Pipeline Change This Week: [+/- \$] Forecast Category Mix: Commit [\$] | Best Case [\$] | Pipeline [\$] Activity This Week: - Calls / conversations: [Number] - Emails sent: [Number] - Meetings held: [Number] - New opportunities created: [Number and value] - CRM compliance rate: [%] Deal Activity: - Deals that advanced this week: [List name and stage moved to] - Deals that stalled or were pushed: [List name and what changed] - Deals added to or removed from forecast: [List changes] Call / Email Insights (if available from conversation intelligence tools): [Paste any

summaries or themes from recorded calls or email analysis] Generate a brief that includes:

1. Performance Summary: Is this rep trending toward, ahead of, or behind their period target based on current pipeline and velocity?
2. Strengths This Week: One to two specific behaviors or results that should be acknowledged
3. Development Priority: The single most important coaching focus for this week's 1:1, with supporting evidence from the data
4. Suggested Coaching Question: One specific question the manager should ask based on the development priority
5. Watch List: Any deal or behavior the manager should monitor closely before next week

Expected Output Format: Five-section brief, generated before the 1:1 and reviewed by the manager—not shared with the rep directly. The manager uses it to prepare coaching questions and focus the conversation on the highest-impact development area.

Pro Tip: The development priority section is the most important coaching output. Resist the temptation to list multiple development areas. A weekly 1:1 that tries to address three coaching themes addresses none of them with enough depth to change behavior.

Illustrative Output Example — Review before use. AI outputs require human verification.

>> PERFORMANCE SUMMARY: Behind Pace — Needs Attention Current pipeline is \$312,000 against a quarterly target of \$195,000 (1.6x coverage vs. the 3x benchmark). Pipeline velocity has declined 18% over the past 3 weeks due to two large deals slipping and below-benchmark new opportunity creation. At current conversion rates and velocity, the most likely close for this rep is \$141,000 — \$54,000 below target.

>> STRENGTHS THIS WEEK:

- a. Meeting Conversion: 4 of 5 discovery calls resulted in a documented next step, which is above the team average of 3.1. This is a consistent strength that should be acknowledged before moving to development.
- b. CRM Compliance: 94% compliance rate this week — all required fields populated, close dates current. This makes coaching conversations more reliable and should be noted as a behavioral standard to maintain.

>> DEVELOPMENT PRIORITY: New Opportunity Creation Only 1 new opportunity was

created this week against a weekly benchmark of 3. This is the third consecutive week below benchmark. At current creation rates, pipeline coverage will fall to 1.2x within 21 days — which is a statistical near-certainty of a missed quarter. The issue is not deal quality; it is volume entering the funnel.

>> SUGGESTED COACHING QUESTION: "Walk me through how you are spending the first 90 minutes of each day — specifically what prospecting actions you are taking and which accounts you are prioritizing from the target list." This surfaces whether the issue is time allocation, list quality, outreach quality, or something else before the manager recommends a solution.

>> WATCH LIST: Opportunity "Tradeshaw Sponsorship Q3 — Meridian Group" (\$62,000, Stage 3) has been in stage for 24 days against a 14-day benchmark. No buyer response in 11 days. If this deal slips or is removed from forecast, coverage falls below 1.2x. Requires direct attention in this week's 1:1.

Prompt 6.2: Call Debrief and Coaching Summary

Revenue Motion: **New Business, Expansion, Retention**

Tools: ChatGPT, Claude, Gong, Avoma, Chorus, Fireflies, Granola

When to Use: After any significant sales or customer success call—new business discovery, proposal presentation, renewal conversation, or QBR. Use the call transcript or summary as input.

Context Inputs Required: Call transcript or AI-generated call summary from a conversation intelligence tool, deal name and stage, call objective.

The Prompt:

Analyze the following sales or customer success call and produce a coaching debrief. Deal / Account: [Name] | Stage: [Stage] | Call Objective: [What the call was intended to achieve] Call Transcript or Summary: [Paste transcript or AI-generated summary] Analyze the call and provide: 1. Objective Assessment: Did the call achieve its stated objective? What

evidence from the call supports this? 2. Strengths: Two specific things the seller or CSM did well in this call — cite exact moments or language 3. Development Opportunities: Two specific areas where the call could have gone better — be concrete and cite the specific moment in the call 4. Discovery Quality: Did the seller ask questions that uncovered the buyer's priorities, timeline, and decision process — or did they default to presenting? 5. Buyer Signals: What did the buyer's language and behavior signal about their level of interest, urgency, and commitment? 6. Recommended Next Step: What should happen next based on what was learned in this call — and what is the owner and deadline?

Expected Output Format: Six-section debrief. Share with the rep after the manager review as the basis for a development conversation, not as a performance evaluation. Frame as “here is what the data shows” rather than “here is my assessment of you.”

Pro Tip: The most common mistake with AI-assisted call debrief is using it as surveillance rather than coaching. Establish with the team that call analysis is used to make everyone better, not to identify underperformers. Teams that trust the intent of the tool use it more—and improve faster.

Prompt 6.3: Team Pattern Analysis

Revenue Motion: New Business, Expansion, Retention

Tools: ChatGPT, Claude, Gong, Clari, Salesforce

When to Use: Monthly, after reviewing individual rep performance briefs. Use to identify team-wide patterns that indicate systemic process issues rather than individual skill gaps.

Context Inputs Required: Team performance data for the month: win rates, average sales cycle, stage conversion by stage, slippage rates, CRM compliance, forecast accuracy by rep. Aggregate rather than individual level for this prompt.

The Prompt:

Analyze the following team performance data and identify systemic patterns that require a management response. Team: [Name / Segment] | Period: [Month / Quarter] | Number of Reps: [X] Team Metrics (current period): - Blended win rate: [%] | Target: [%] - Average sales

cycle: [Days] | Benchmark: [Days] - Stage 1 to 2 conversion: [%] | Stage 2 to 3: [%] | Stage 3 to 4: [%] | Stage 4 to Close: [%] - Slippage rate: [%] - CRM compliance rate: [%] - Forecast accuracy: [% variance] Rep-Level Range (not names — show the spread): - Win rate range: [Low] to [High] - Sales cycle range: [Low] to [High] days - Forecast accuracy range: [Low] to [High] variance Common objection themes from calls (if available): [List top 3] Common reasons for closed-lost (if available): [List top 3] Identify: 1. The most significant pattern in the data that is not a one-off but a systemic issue 2. Whether variance is more likely a process problem, a skills problem, or a market or product problem — and the evidence for that assessment 3. The stage in the funnel where the team is losing the most value relative to benchmark 4. One enablement or process change that would have the highest expected impact on team performance 5. A specific conversation the manager should have with the full team in the next team meeting

Expected Output Format: Five-section analysis focused on systemic patterns. Use as the agenda for the monthly manager-level performance review with senior leadership, and as input to the enablement planning calendar.

Pro Tip: The distinction between a process problem and a skills problem is the most important output of this prompt. Process problems require system or workflow changes. Skills problems require coaching and enablement. Applying a coaching solution to a process problem—or vice versa—produces no improvement.

Section 7: RevOps and AI Governance

These prompts are designed for RevOps leaders who own the AI Operating Model as a living system. The AI Operating Model does not stay effective on its own. Signals go stale. Processes drift. Tools get added without governance. These prompts provide the quarterly and monthly review cadence that keeps the model producing revenue outcomes rather than becoming another layer of tool sprawl.

Prompt 71: Signal Performance Review

Revenue Motion: New Business, Expansion, Retention

Tools: ChatGPT, Claude, Clari, Salesforce, BI platform (Tableau, Power BI, Looker)

When to Use: Quarterly. Run after the period closes and before the next quarter's planning begins. Owner: RevOps lead with input from Sales and CS leadership.

Context Inputs Required: List of active predictive signals with their defined thresholds, the revenue outcomes each signal was designed to predict, actual outcomes over the past quarter for accounts or deals where each signal did and did not fire, signal trigger rate (how often each signal fired), and false positive rate (how often a signal fired but the predicted outcome did not occur).

The Prompt:

Conduct a signal performance review for the following set of active predictive signals. Review Period: [Quarter and Year] Revenue Motion: [New Business / Expansion / Retention] For each signal below, provide the analysis requested: Signal Name: [Signal 1 Name] Designed to predict: [Outcome — e.g., renewal risk, deal slippage, expansion readiness] Threshold: [Condition that triggers the signal] Times fired this quarter: [Number] Outcomes when signal fired: [How many predicted outcomes occurred vs. did not] Outcomes when signal did NOT fire: [Did the predicted outcome occur anyway?] [Repeat for each active signal — list up to 8] For each signal, assess: 1. Predictive accuracy: Is this signal still reliably predicting the outcome it was designed to predict? 2. False positive rate: Is this signal firing too frequently and generating noise rather than actionable alerts? 3. False negative rate: Are outcomes occurring that the signal should have caught but did not? 4. Verdict: Keep as-is | Adjust threshold | Retire | Replace with a higher-predictive signal Then provide: 5. The two signals with the highest current predictive value that should be kept and potentially given more weight 6. The one signal most likely to have gone stale and the recommended replacement or adjustment 7. One new signal that should be added based on outcomes observed this quarter that no current signal is capturing

Expected Output Format: Per-signal verdict table plus three summary recommendations. Use as the agenda for the quarterly RevOps signal review meeting. Decisions from this review update the signal-to-action map and are communicated to all signal owners.

Pro Tip: Signals go stale when business conditions change: a new product is launched, a competitive shift occurs, or a customer segment behaves differently than it did when the signal was calibrated. Running this review quarterly prevents the AI Operating Model from optimizing for a business that no longer exists.

Illustrative Output Example — Review before use. AI outputs require human verification.

>> SIGNAL PERFORMANCE SUMMARY — Q2 2026 — Retention Motion

>> SIGNAL: Renewal Date Inside 90 Days with No Value Review Scheduled

Predictive Accuracy: HIGH — Fired 23 times. Of those, 19 accounts had a renewal conversation delayed past the renewal date or did not renew. Accuracy rate: 83%.

False Positive Rate: LOW — 4 accounts where signal fired but renewed without intervention. Acceptable.

Verdict: KEEP AS-IS. This signal is performing at or above calibration.

>> SIGNAL: Email Engagement Below 15% Open Rate for 3 Consecutive Campaigns

Predictive Accuracy: LOW — Fired 41 times. Only 11 resulted in a churn or non-renewal outcome. 30 accounts where the signal fired renewed normally. Accuracy rate: 27%.

False Positive Rate: HIGH — Signal is being diluted by accounts with low email engagement as a baseline behavior, not as a disengagement signal.

Verdict: **ADJUST THRESHOLD.** Revise to require both email decline AND reduced event attendance or no CSM-logged contact in 45 days before triggering. Retire the single-signal version.

>> HIGHEST VALUE SIGNALS: (1) Renewal Date Inside 90 Days with No Value Review — retain and weight more heavily in health scoring. (2) Campaign delivery below 70% of guarantee at midpoint — strong churn predictor, should be elevated to primary signal.

>> SIGNAL MOST LIKELY STALE: Three-consecutive-week email decline. Market-wide email open rate benchmarks have declined 22% since this signal was calibrated. The threshold no longer distinguishes disengagement from industry trend.

>> RECOMMENDED NEW SIGNAL: New C-suite hire at renewal accounts with contracts above \$50,000. This quarter, 4 of the 6 highest-value churn events were preceded by a new executive joining 60 to 120 days before renewal. No current signal is capturing leadership change as a renewal risk factor.

Prompt 7.2: Quarterly AI Operating Model Audit

Revenue Motion: All Motions

Tools: ChatGPT, Claude, Copilot

When to Use: Quarterly. Conducted by RevOps with input from all GTM function leaders. Schedule as a standing 90-minute working session at the start of each quarter.

Context Inputs Required: Current state of each AI Operating Model layer (data quality status, active signals and their performance, workflows in use and adoption rates, coaching cadence adherence, governance policies and ownership), revenue outcomes for the prior quarter, and any changes to the business model, product portfolio, or team structure that occurred in the prior quarter.

The Prompt:

Conduct a quarterly audit of our AI Operating Model for revenue. Evaluate each of the five layers and produce a prioritized improvement plan for the next quarter. Organization: [Company Name] | Quarter Being Reviewed: [Q and Year] Primary Revenue Motion in Scope: [New Business / Expansion / Retention / All] Layer 1 — Data Layer: - CRM compliance rate: [%] - Primary data gaps or quality issues identified this quarter: [List] - New data sources connected or disconnected: [List] - Data governance issues encountered: [List] Layer 2 — Signal Layer: - Number of active signals: [Number] - Signals retired or added this quarter: [List] - Signal performance summary: [Brief — e.g., 3 of 6 signals performing above 70% accuracy] - Signals with no owner or no review cadence: [List] Layer 3 — Workflow Layer: - Active AI-assisted workflows: [List with adoption rate if known] - Workflows designed but not adopted: [List and reason] - New workflows launched this quarter: [List] - Workflow breakdowns or failures reported: [List] Layer 4 — Coaching Layer: - Coaching cadence adherence: [% of scheduled 1:1s and team reviews completed] - AI-assisted coaching tools in use: [List] - Coaching prompts used consistently vs. ad hoc: [Assessment] - Manager feedback on coaching tool quality: [Summary] Layer 5 —

Governance Layer: - AI Operating Model owner: [Role] - Documented governance policies in place: [Yes/No and status] - Quarterly review cadence maintained: [Yes/No] - Ownership gaps identified: [List any signals, workflows, or tools without a named owner] For each layer, provide: 1. Current maturity rating: Reactive (1), Structured (2), Predictive (3), or Adaptive (4) 2. The single most important improvement for next quarter with a recommended owner and target completion date 3. Any layer where regression occurred (maturity declined from prior quarter) and the likely cause Then provide a 3-item prioritized action list for the next quarter that will have the highest combined impact on revenue outcomes.

Expected Output Format: Five-layer audit with maturity ratings, one priority action per layer, and a three-item quarter plan. This is the RevOps planning document for the next quarter. Distribute to all GTM function leaders within one week of the audit session.

Pro Tip: The most common finding in these audits is that the Workflow Layer has the most unused or unadopted AI investments. Technology was purchased, prompts were designed, but the operating cadence to use them consistently was never embedded. The audit forces this into the open so it can be addressed with process changes rather than additional tool purchases.

Prompt 7.3: Revenue Root Cause Analysis

Revenue Motion: All Motions

Tools: ChatGPT, Claude, Clari, Salesforce, BI platform

When to Use: Quarterly, within two weeks of period close when revenue results were significantly above or below target. Also triggered by any single-month miss greater than 10% of target. Owner: RevOps with CRO and function leaders.

Context Inputs Required: Final revenue results vs. target by stream and segment, forecast submitted at the equivalent of week 8 vs. actuals, primary drivers of variance (by deal, segment, or motion), any signals that did or did not fire before the outcome, and any operational or market changes that occurred during the period.

The Prompt:

Conduct a revenue root cause analysis for the following period results. Organization: [Company Name] | Period: [Month or Quarter and Year] Revenue Target: [\$] | Actual Revenue: [\$] | Variance: [\$] ([+/-]%) Week-8 Forecast: [\$] | Forecast Variance from Actuals: [\$] ([+/-]%) Revenue by Stream (target vs. actual): - [Stream 1, e.g., Sponsorship]: Target [\$] | Actual [\$] | Variance [\$] - [Stream 2, e.g., Digital Advertising]: Target [\$] | Actual [\$] | Variance [\$] - [Stream 3, e.g., Event Attendance]: Target [\$] | Actual [\$] | Variance [\$] - [Stream 4, e.g., Data/Subscriptions]: Target [\$] | Actual [\$] | Variance [\$] Primary Deals Contributing to Variance: [List: Deal Name | Revenue Motion | Expected Value | Actual Outcome | Why it differed from forecast] Signals That Fired Before the Outcome: [List signals that did trigger and what action was taken] Signals That Did Not Fire (but should have, in retrospect): [List outcomes that occurred without a preceding signal alert] External or Market Factors: [Any relevant market, competitive, or macro conditions] Provide: 1. The primary cause of the revenue variance — distinguish between: market or demand factors (outside our control), process or execution failures (within our control), data or signal failures (our early warning system did not work), and pricing or product factors 2. The revenue stream with the most controllable variance and the specific process change that would have changed the outcome 3. Whether the AI Operating Model detected the risk early enough to intervene — and if not, which layer failed (data, signal, workflow, coaching, or governance) 4. Three specific changes to make before the next quarter begins, with owners and a 30-day implementation target for each 5. One leading indicator to add to the weekly operating review based on what this analysis revealed

Expected Output Format: Five-section root cause analysis with specific, actionable recommendations. This is not a post-mortem report. It is an operating improvement document. Every recommendation must have an owner and a deadline before the meeting ends.

Pro Tip: The most important discipline in this analysis is separating controllable from uncontrollable variance. Organizations that attribute all miss to market conditions never improve their operating model. Organizations that attribute all miss to execution never build strategic resilience. The analysis should produce both.

Quick Reference: All Prompts by Use Case and Role

Use this index to identify which prompts belong in each role's weekly and monthly workflow.

#	Prompt Name	Revenue Motion	Primary Role	When to Run
1.1	Company Intelligence Brief	New Business	Seller	Before every first outreach
1.2	ICP Fit Score	New Business	Seller / RevOps	After company brief
1.3	Buying Committee Map	New Business	Seller	Once ICP confirmed Medium+
1.4	Personalized Outreach Draft	New Business	Seller	Per role in sequence
2.1	Opportunity Risk Summary	New Business, Expansion	RevOps / Manager	Weekly — before pipeline review
2.2	Stage Aging Analysis	New Business, Expansion	Sales Manager	When stage benchmark exceeded
2.3	Stakeholder Risk	All Motions	Sales	At commit entry

2.4	Manager Coaching Questions	New Business, Expansion	Sales Manager	Before each deal 1:1
3.1	Renewal Risk Brief	Retention	CSM / Acct Manager	Monthly — all accounts inside 180 days
3.2	Value Realization Summary for QBR or EBR	Retention, Expansion	CSM / Acct Manager	Before every QBR or EBR
3.3	Save Play Recommendation	Retention	CS Lead / CRO	Immediately on Red risk rating
3.4	Customer Health Score Summary	Retention, Expansion	CSM / RevOps	Monthly — all active accounts
4.1	Pipeline Coverage Analysis	New Business, Expansion	RevOps / Sales Mgr	Weekly — Monday before pipeline meeting
4.2	Forecast Narrative for Leadership	All Motions	RevOps / CRO	Weekly and at period close
4.3	Pipeline Review Agenda Builder	New Business, Expansion	RevOps / Sales Mgr	Before each pipeline review meeting
4.4	Forecast vs. Actuals Debrief	All Motions	RevOps / CRO	Within one week of period close
5.1	White Space	Expansion	Acct Manager	Quarterly —

	Analysis		/ CSM	account planning
5.2	Expansion Outreach Hypothesis	Expansion	Acct Manager	When timing trigger is identified
6.1	Weekly Rep Performance Brief	All Motions	Sales Manager	Weekly — before each rep 1:1
6.2	Call Debrief and Coaching Summary	All Motions	Sales Manager	After significant calls
6.3	Team Pattern Analysis	All Motions	Sales Manager / CRO	Monthly — team performance review
7.1	Signal Performance Review	All Motions	RevOps Lead	Quarterly — after each period close
7.2	Quarterly AI Operating Model Audit	All Motions	RevOps / CRO	Quarterly — start of each quarter
7.3	Revenue Root Cause Analysis	All Motions	RevOps / CRO	Quarterly — within 2 weeks of period close

How to Chain Prompts Into Complete Workflows

Individual prompts are useful. Chained prompts are workflows. The highest-value use of this playbook is not running one prompt in isolation — it is running a sequence of prompts where the output of each becomes the input of the next.

Chain 1: New Business — From Target Account to Pipeline Opportunity

Step	Prompt	What You Feed In	What You Get Out
1	1.1 Company Intelligence Brief	Company name, website URL	Company brief — stored in CRM account record
2	1.2 ICP Fit Score	Your ICP definition + output from Step 1	Fit score and rating: High / Medium / Low
3	1.3 Buying Committee Map	Company brief + your product category (from Step 1)	Role-by-role stakeholder table with message angles
4	1.4 Personalized Outreach Draft	Stakeholder name and role (from Step 3) + key company facts (from Step 1)	Personalized email draft per stakeholder — ready for human review

Time savings: Full chain run time: 15 to 20 minutes per account. Time saved vs. manual research: 45 to 90 minutes. Outputs stored in CRM serve the entire account team, not just the seller who ran the prompts.

Chain 2: Pipeline Review – From CRM Data to Decision-Ready Meeting

Step	Prompt	What You Feed In	What You Get Out
1	4.1 Pipeline Coverage Analysis	Pipeline value by stage, target, conversion rates, days remaining	Coverage assessment and sourcing gap analysis
2	2.1 Opportunity Risk Summary	CRM data for each deal above threshold (run once per deal)	Risk score, top risk factors, and recommended action per deal
3	4.3 Pipeline Review Agenda Builder	Coverage analysis (Step 1) + at-risk deal list from risk scores (Step 2)	Timed decision agenda for the pipeline meeting
4	4.2 Forecast Narrative for Leadership	Forecast call, deal changes, risks and upside from the pipeline review	Executive-ready forecast narrative — sent before Monday leadership meeting

Time savings: Full chain run time: 30 to 45 minutes for a team of 8 to 10 reps. Replaces 2 to 3 hours of manual pipeline report-building. The agenda builder alone eliminates the most common pipeline meeting failure: no structure, no decisions.

Chain 3: Retention – From Risk Detection to Save Play Activation

Step	Prompt	What You Feed In	What You Get Out
1	3.4 Customer Health Score Summary	All engagement inputs across campaign, email, event, support, NPS	Health score, tier rating, and two priority gaps per account
2	3.1 Renewal Risk Brief	Health score output (Step 1) + campaign performance + engagement data	Risk rating, primary driver, and 14-day intervention plan
3	3.3 Save Play Recommendation	Risk brief (Step 2) + account history + stakeholder contacts	Five-step save play with owners, deadlines, and walk-away criteria
4	3.2 Value Realization Summary	Delivery data, outcomes, customer goals — prepared for the intervention meeting	Executive-ready value narrative for the QBR or save conversation

Time savings: Full chain run time: 20 to 30 minutes per at-risk account. This chain is the operational definition of proactive retention. Every step produces a CRM-stored output that gives the next person who touches the account immediate context.

Chain 4: Coaching – From Activity Data to Development-Ready 1:1

Step	Prompt	What You Feed In	What You Get Out
1	6.1 Weekly Rep Performance Brief	CRM pipeline data, activity log, forecast changes for the rep this week	Performance summary, strengths, one development priority, coaching question
2	2.4 Manager Coaching Questions	Top at-risk deal for the rep (from performance brief or risk scoring)	Five evidence-based coaching questions for the 1:1 deal discussion
3	6.2 Call Debrief	Call transcript or summary from the rep's most significant call this week	Evidence-based coaching debrief — the development conversation foundation

Time savings: Full chain run time: 15 to 25 minutes per rep before the 1:1. The manager arrives with a performance brief, evidence-based deal questions, and a call debrief. The rep arrives knowing the meeting will be specific and evidence-anchored. Both parties get more out of the time.



A Note on AI Tool Selection

Every prompt in this playbook runs in any general-purpose large language model, including ChatGPT (GPT-4o), Claude (Sonnet or Opus), and Microsoft Copilot. The choice of tool matters less than the quality of the inputs you provide and the discipline with which you review and act on the outputs.

For revenue-specific workflows, several platform-native AI tools provide additional value because they access live CRM and conversation data directly.

Tool Category	Best Use
General Purpose Tools ChatGPT, Claude, Copilot	Run every prompt in this playbook with copy/paste inputs. Best starting point for teams building workflow discipline.
Gong / Avoma / Granola	Best for call debrief and coaching prompts (Section 6) because they operate on actual recorded call transcripts rather than rep-provided summaries.
Clari / People.ai	Best for pipeline coverage and forecast prompts (Section 4) because they draw from live CRM data and historical conversion patterns.
Gainsight / ChurnZero / Hubspot Service	Best for renewal risk and health score prompts (Section 3) because they aggregate customer success signals across all touchpoints.
Salesforce Einstein / HubSpot	Best for organizations that want AI embedded in their

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Guidance: The highest-value AI configuration is not the most sophisticated one. It is the one your team will actually use consistently. Start with the general-purpose tool your team already has access to. Build the workflow discipline first. Add specialized tools when the workflow is embedded.

The Revenue Room™ Bootcamp is an intensive executive education program designed for cross-functional revenue leadership teams at B2B media, events, and information companies. Each bootcamp runs six sessions and produces a working deliverable — not a certification, not a slide deck, but a company-specific operating blueprint that participants can put into practice the week the program ends.

Every bootcamp is built around four learning types that work together across the six sessions.

Instructor-led sessions deliver the core frameworks, models, and methodologies live, with facilitated discussion grounded in the business models and revenue dynamics specific to B2B media and events organizations. Sessions are one hour each and are recorded for on-demand access.

Self-directed learning gives participants the reference materials, KPI definitions, prompt libraries, and how-to guides they need to go deeper on any concept between sessions and to support their team members who could not attend a live session. This document is part of that self-directed learning library.

Team collaboration is built into every session through structured working exercises that require cross-functional input. Sales, marketing, customer success, RevOps, data, and finance must work together on the exercises — which is by design. The frameworks only work when the whole revenue team owns them.

Applied learning through the Capstone integrates all six sessions into a single deliverable: a company-specific revenue operating plan with defined signals, KPIs, workflows, and a 30-60-90 day execution roadmap. The Capstone is presented in the final session and becomes the team's operating blueprint going forward.

Three Bootcamps Per Year

H2K Labs hosts three Revenue Room™ Bootcamps annually, each addressing a distinct strategic priority for B2B revenue leadership teams.

Q1: Sales Plays in 30 Days — A focused, fast-execution program for revenue teams that need to build and deploy specific sales plays quickly. Covers play design, signal-to-action frameworks, enablement, and a 30-day implementation plan.

Q2: The AI Operating Model — GTM — The program these materials support. Covers the five-layer AI Operating Model: data, signal, workflow, coaching, and governance. Participants build a company-specific AI-enabled revenue operating blueprint as the Capstone deliverable.

Q4: Building Your Center of Revenue Excellence — A strategic program for organizations building or maturing a Revenue Operations function. Covers RevOps structure, governance, technology stack, KPI frameworks, continuous improvement loops, and the organizational design required to sustain a high-performing revenue system.

Who Should Attend

Revenue Room™ Bootcamps are designed for cross-functional revenue leadership teams, not individual contributors attending alone. The learning model requires multiple functions in the room working on real shared challenges.

Participating teams typically include leaders from sales and business development, marketing and demand generation, customer success and account management, revenue operations, data and analytics, product, and finance. The CEO or COO often participates as the executive stakeholder who sets the strategic context and owns accountability for the Capstone deliverable.

The program works best when the team attending a bootcamp is the same team that will implement the operating model it builds. One leader attending on behalf of a team produces a document. A team attending together produces a behavior change.

To learn more about The Revenue Room™ Bootcamp, contact Heather Holst-Knudsen at

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Interested in a Future Revenue Bootcamp?

We host virtual bootcamps for teams of revenue leaders navigating AI disruption, revenue transformation, and operational alignment.

OUR SIGNATURE BOOTCAMPS

Sales Plays in 30 Days

Build and launch targeted sales plays in a single month.

Building Your Center of Revenue Excellence

Align teams around a unified revenue operating model.

The AI Operating Model

Integrate AI into your revenue engine for scalable growth.

These are **implementation-focused working cohorts**, not webinars — built for leaders who want practical execution, sharper alignment, and faster growth outcomes.

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