The Revenue Room™ Bootcamp

THE REVENUE KPI DICTIONARY

46 KPIS. FIVE CATEGORIES.
BUILT FOR CROSS-FUNCTIONAL
REVENUE LEADERSHIP TEAMS.

H2K LABS

The Revenue Room™ KPI Dictionary

46 ESSENTIAL KPIS FOR B2B MEDIA, EVENTS & INFORMATION COMPANIES

The Revenue Room™ Revenue KPI Dictionary

46 Essential KPIs for B2B Media, Events, and Information Companies

Built for cross-functional revenue leadership teams

This dictionary provides **precise definitions**, **calculation methods**, **predictive value**, and **common measurement mistakes** for every KPI that matters to B2B media, events, and information organizations. It is organized by **revenue motion** so leaders can build a **KPI spine** that reflects how their business actually generates revenue—and review the right signals at the right cadence.

📊 How to Use This Dictionary

Field	What It Tells You
KPI Type	Whether the KPI measures overall performance or the health of an underlying process.
Indicator	Whether it is **leading** (predictive) or **lagging** (confirming).
Owner	The role accountable for monitoring the KPI and initiating action.
Review Cadence	How often it should be reviewed and where it belongs in the operating rhythm.
Definition	The precise meaning—eliminates cross-functional disagreement.

Calculation	The formula, including segmentation guidance and key adjustments.
What It Predicts	The revenue outcome it is most reliably connected to—and why it changes decisions.
Common Mistakes	The most frequent measurement errors and how to avoid them.

🎯 Building Your KPI Spine

No organization should track all 46 KPIs simultaneously. Select **8–12** that align to your primary revenue motions and biggest performance gaps, then assign them across three levels with a clear review cadence and action protocol.

- **Executive level (3–4 KPIs)**: Total revenue vs. plan, net dollar retention, pipeline coverage ratio, forecast accuracy. Reviewed monthly and quarterly.
- **Functional leader level (3–4 KPIs)**: Retention rate, expansion pipeline value, win rate by segment, campaign performance score. Reviewed weekly and monthly.

Frontline manager level (2–4 KPIs): CRM compliance, stage-age vs. benchmark, deal push rate, at-risk revenue by account. Reviewed weekly.

Start with the revenue motion where performance gaps are largest. Instrument the KPIs that predict outcomes in that motion first, then add coverage for other motions once the first set is embedded in the operating rhythm.

💼 Section 1: New Business Acquisition KPIs

New business acquisition is the revenue motion focused on converting **net-new accounts** into customers—new sponsors, advertisers, exhibitors, subscribers, and data intelligence buyers. The KPIs below measure **pipeline health**, **conversion efficiency**, and the **cost** of building the customer base.

Pipeline Coverage Ratio

KPI Type	Indicator	Owner	Review Cadence
Health KPI	Leading	CRO / Sales Manager / RevOps	Weekly (pipeline meeting)

Definition: The ratio of total **qualified pipeline value** to the revenue target for a defined period—answers: *do we have enough in the pipe to hit the number?*

Calculation: Total qualified pipeline value ÷ revenue target for the period. Benchmark is often **3× quarterly coverage**; some teams use probability-weighted pipeline for a more conservative view.

What It Predicts: Likelihood of hitting the target at current conversion rates. Below **2.5×** for a quarter is a reliable predictor of a miss; above **4×** can indicate inflation rather than health.

Common Mistakes: Counting unqualified early-stage deals, failing to segment by product/brand/channel, and using generic benchmarks instead of your historical conversion rates.

Win Rate by Segment

KPI Type	Indicator	Owner	Review Cadence
Performance KPI	Lagging	CRO / VP Sales / RevOps	Monthly (segmented)

Definition: The percentage of opportunities that close **won**, calculated separately for each meaningful segment so blended averages don't hide performance patterns.

Calculation: Closed-won ÷ (closed-won + closed-lost) for the period. Segment by new logo vs. expansion, product line, inbound vs. outbound, and **ICP-qualified** vs. non-ICP.

What It Predicts: Sales process effectiveness and qualification quality by segment. ICP-qualified win rates often run **15–30 points** higher than blended rates in well-managed teams.

Common Mistakes: Reporting only blended win rate, skipping ICP segmentation, and failing to separate by revenue motion (new business vs. expansion).

Average Sales Cycle Length

KPI Type	Indicator	Owner	Review Cadence
Health KPI	Leading	Sales Manager / RevOps	Monthly (segmented)

Definition: The average number of days from opportunity creation to closed-won, tracked by product line, deal size tier, ICP tier, and source to surface actionable patterns.

Calculation: Sum of (close date − opportunity create date) for closed-won deals ÷ number of closed-won deals. Segment by product/channel; exclude extreme outliers (e.g., >2× median) when setting the operational benchmark.

What It Predicts: How much pipeline is required to hit current-period targets and where deals are stalling. A lengthening cycle is an early warning of pipeline risk before slippage appears.

Common Mistakes: Using one blended average, failing to refresh benchmarks as the business changes, and choosing a statistic that hides long-deal impact on capacity planning.

Lead-to-Opportunity Conversion Rate

KPI Type	Indicator	Owner	Review Cadence
Performance KPI	Lagging	Marketing / RevOps	Monthly (by source)

Definition: The percentage of marketing-qualified leads that are accepted by sales and converted into active pipeline opportunities within a defined window (typically **30 days**).

Calculation: Sales-accepted opportunities created ÷ marketing-qualified leads delivered in the same period. Track by lead source (content, event registration, intent, outbound, referral) and ICP tier.

What It Predicts: Effectiveness of marketing qualification and sales follow-up. Low conversion by source signals definition misalignment or weak follow-up discipline on specific lead types.

Common Mistakes: Not tracking by source, stopping at MQL-to-SAL without following through to outcomes, and averaging fundamentally different lead inputs into one number.

New Logo Count

KPI Type	Indicator	Owner	Review Cadence
Performance KPI	Lagging	CRO / VP Sales	Monthly & quarterly

Definition: The number of **net-new accounts** that generated closed-won revenue in a period, excluding expansion of existing accounts.

Calculation: Count of unique accounts with a first-ever closed-won opportunity in the period. Exclude lapsed accounts that returned (track separately as re-acquisition).

What It Predicts: Long-term health of the revenue base. Declining new logos alongside strong NDR increases concentration risk that won't show up in totals until key accounts churn.

Common Mistakes: Counting re-activations as new logos, failing to segment by ICP tier, and setting targets without accounting for capacity impacts on retention/expansion workload.

Cost Per Qualified Opportunity

KPI Type	Indicator	Owner	Review Cadence
Performance KPI	Lagging	Marketing / RevOps / CFO	Quarterly

Definition: The total cost of sales and marketing activities required to generate one **sales-accepted, qualified** pipeline opportunity—distinct from cost per lead (volume, not quality).

Calculation: Total sales & marketing spend (salaries, programs, tech, events) ÷ number of sales-accepted opportunities created. Segment by channel to identify cost efficiency by source.

What It Predicts: Demand gen and sales development efficiency. Rising cost per qualified opportunity signals declining lead quality, rising program costs, or deteriorating SDR productivity.

Common Mistakes: Confusing cost per lead with cost per qualified opportunity, excluding fully loaded SDR time, and not segmenting by channel (which blocks optimization).

Pipeline Velocity

KPI Type	Indicator	Owner	Review Cadence
Health KPI	**Leading**	**CRO / RevOps**	**Weekly**

Definition: A composite measure of how fast qualified revenue moves through the pipeline—combines opportunity count, average deal size, win rate, and sales cycle length into expected revenue generated per day.

Calculation: (Number of qualified opportunities) × (Average deal size) × (Win rate) ÷ (Average sales cycle in days). Compare period-over-period to identify acceleration or deceleration.

What It Predicts: Whether the current pipeline can generate revenue fast enough to hit targets. Declines point to which lever is failing: volume, deal size, win rate, or cycle length.

Common Mistakes: Using blended inputs that hide segment issues, not tracking the trend over time, and treating velocity as a diagnostic only instead of a weekly operating metric.

🔄 Section 2: Customer Retention KPIs

Customer retention is the revenue motion focused on preserving existing revenue by renewing sponsors, advertisers, subscribers, and members. In B2B media and events, retention is the foundation for expansion and new business growth—small improvements in retention often outperform equivalent investment in acquisition.

Gross Revenue Retention Rate

KPI Type	Indicator	Owner	Review Cadence
Performance KPI	**Lagging**	**CRO / VP Customer Success / RevOps**	**Monthly (segmented)**

Definition: The percentage of prior-period contracted revenue retained from existing customers in the current period, excluding any expansion. A pure measure of the ability to hold what you already have.

Calculation: (Prior-period revenue from customers that renewed/continued) ÷ (total prior-period revenue from those customers). A result of 100% means no churn or contraction (but no growth implied).

What It Predicts: Stability of the revenue base and effectiveness of delivery and renewal discipline. In many media/events models, gross retention below 80% signals systemic issues requiring intervention.

Common Mistakes: Blending gross and net retention, measuring by account count instead of revenue, and failing to segment by product line or revenue stream.

Net Dollar Retention

KPI Type	Indicator	Owner	Review Cadence
Performance KPI	**Lagging**	**CEO / CRO / CFO**	**Monthly & quarterly**

Definition: Total revenue from the prior-period customer cohort in the current period, including expansion and net of churn/contraction, expressed as a percentage of starting cohort revenue. Above 100% means the base is growing before new customers are added.

Calculation: (Starting cohort revenue + expansion − churn − contraction) ÷ starting cohort revenue. Track by cohort year and segment to see whether performance is improving over time.

What It Predicts: Long-term capital efficiency and growth trajectory. Above 110% supports growth with limited acquisition; below 90% indicates a structural revenue leak.

Common Mistakes: Reporting only a total-company NDR, not separating expansion vs. retention drivers, and failing to set targets by tier/product line.

Sponsor and Advertiser Retention Rate

KPI Type	Indicator	Owner	Review Cadence
Performance KPI	**Lagging**	**VP Customer Success / Account Management / CRO**	**Monthly (by cycle)**

Definition: The percentage of prior-year sponsors/advertisers that renewed or purchased again in the current cycle—often the single most important revenue metric in media/events models.

Calculation: Dollar value (preferred) or count of prior-cycle sponsor/advertiser accounts that renewed ÷ total prior-cycle sponsor/advertiser revenue/accounts. Segment by brand, product line, and tier.

What It Predicts: Health of the sponsor value proposition and quality of delivery/relationship management. Dollar-weighted retention below 75% typically requires immediate diagnosis.

Common Mistakes: Measuring by count instead of dollars, skipping segmentation, and conflating contraction (reduced spend) with churn (left entirely).

Campaign Performance Score

KPI Type	Indicator	Owner	Review Cadence
Health KPI	**Leading**	**Campaign Ops / Customer Success Manager**	**Weekly**

Definition: A composite score measuring each active sponsor/advertiser campaign against contracted delivery targets. In media/events, underperformance is a primary driver of non-renewal and a highly actionable churn signal.

Calculation: Weighted average of delivery KPIs (leads, CTR, reach, attendance, downloads) vs. guaranteed targets, expressed as % of target. 100% = on track; below 80% triggers a risk flag.

What It Predicts: Renewal probability. Campaigns below 80% of guaranteed metrics typically renew 25–40 points less often than on-track campaigns.

Common Mistakes: Reviewing monthly instead of weekly, using only aggregate averages, and not connecting campaign performance to the CRM account record for action.

At-Risk Revenue

KPI Type	Indicator	Owner	Review Cadence
Health KPI	**Leading**	**RevOps / Customer Success Leadership**	**Weekly**

Definition: The total dollar value of contracted or expected renewal revenue from accounts flagged as at risk based on defined signal thresholds—tracked to force proactive intervention before renewal decisions.

Calculation: Sum of annualized contracted/expected renewal revenue for all accounts with a risk flag (e.g., campaign underperformance, declining engagement, escalations, renewal inside 90 days with no value review scheduled).

What It Predicts: Expected churn if no intervention occurs. Tracking weekly enables leadership to allocate attention to the accounts where it will have the highest impact.

Common Mistakes: No defined risk criteria (subjective flags), reviewing monthly instead of weekly, and failing to assign an owner and action plan per at-risk account.

Days to Renewal Decision

KPI Type	Indicator	Owner	Review Cadence
Health KPI	**Leading**	**Account Manager / Customer Success Manager**	**Per account (rolling)**

Definition: The number of days between the first formal renewal conversation and the date a signed renewal agreement is received—measured per account and aggregated to identify renewal-cycle discipline.

Calculation: Renewal agreement date – first documented renewal outreach date (calendar days). Track a rolling average across renewals closed in the prior 90 days; compare by tier, product line, and owner.

What It Predicts: Whether renewals are managed proactively or reactively. Long cycles (often >60 days) indicate late outreach, weak value communication, or late economic-buyer engagement.

Common Mistakes: Tracking only renewal outcome (won/lost), not enforcing renewal outreach logging in CRM, and not tying cycle length patterns to tier/contract value.

Revenue Leakage

KPI Type	Indicator	Owner	Review Cadence
Health KPI	**Lagging**	**RevOps / Finance**	**Quarterly**

Definition: The difference between revenue that was contracted/expected/achievable and revenue actually recognized—includes cancellations, make-goods, post-contract discounts, scope reductions, and unbilled deliverables.

Calculation: Contracted revenue for the period – actual recognized revenue from the same accounts, reported as dollars and % of contracted revenue. Segment by leakage type to isolate root causes.

What It Predicts: Systemic delivery or contract-management gaps that erode revenue quietly before churn shows up. Leakage above 5% often signals operational issues that will drive future retention problems.

Common Mistakes: Excluding make-goods, reviewing only annually, and not tying leakage to campaign types or owners for targeted improvement.

📈 Section 3: Expansion Revenue KPIs

Expansion revenue is the revenue motion focused on growing existing customer relationships through upsells, cross-sells, premium tiers, multi-event packages, and deeper enterprise partnerships. Because trust and operating infrastructure already exist, expansion is typically faster to close, higher margin, and more durable than new business.

Expansion Revenue Rate

KPI Type	Indicator	Owner	Review Cadence
Performance KPI	**Lagging**	**CRO / VP Sales / Customer Success Leadership**	**Monthly (segmented)**

Definition: The percentage increase in revenue from existing customers through upsells, cross-sells, additional products, premium tiers, or expanded packages relative to the prior-period baseline.

Calculation: Expansion revenue from existing customers in current period ÷ total revenue from those same customers in the prior period. Track by expansion type (upsell, cross-sell, multi-event, premium add-ons).

What It Predicts: Ability to grow customer lifetime value from the existing base. Strong expansion rates enable meaningful growth without proportional increases in acquisition cost.

Common Mistakes: Including expansion in gross retention, not setting targets by tier, and treating expansion as opportunistic instead of a defined motion with triggers and plays.

Products per Account

KPI Type	Indicator	Owner	Review Cadence
Health KPI	**Leading**	**Customer Success / Account Management / RevOps**	**Quarterly**

Definition: The average number of distinct product lines or revenue streams purchased by each customer account—an indicator of depth and unrealized expansion potential.

Calculation: Total active product-line subscriptions/contracts across all accounts ÷ total active customer accounts. Calculate by account tier to avoid a blended average that hides the pattern.

What It Predicts: Expansion readiness and switching cost. Low products-per-account in high-value tiers signals that systematic expansion is not in place.

Common Mistakes: Reporting only a blended average, not mapping against tenure, and not tying the metric to account planning targets and plays.

Expansion Pipeline Value

KPI Type	Indicator	Owner	Review Cadence
Health KPI	**Leading**	**Sales / Customer Success / RevOps**	**Weekly**

Definition: The total value of expansion opportunities in the pipeline from existing customers, segmented by type (upsell, cross-sell, multi-event, upgrade). Tracked separately because it converts faster and at higher rates than new business.

Calculation: Sum of expected close value for active opportunities coded as expansion in CRM, segmented by type and tier. Apply stage-weighted or signal-weighted probability for forecasting.

What It Predicts: Near-term expansion revenue and whether account teams are systematically identifying and pursuing growth rather than waiting for inbound requests.

Common Mistakes: Mixing expansion with new business pipeline, using identical stage assumptions for both motions, and not tying pipeline creation to trigger signals.

Customer Lifetime Value

KPI Type	Indicator	Owner	Review Cadence
Performance KPI	**Lagging**	**CFO / CRO / RevOps**	**Quarterly**

Definition: The total net revenue expected from a customer relationship over its full duration, capturing the compounding value of retention, expansion, and cross-brand relationships.

Calculation: (Average annual spend) × (expected lifetime in years) − (ongoing cost to retain and serve, including CS/ops and proportional overhead). For multisided models, incorporate indirect revenue impacts where appropriate.

What It Predicts: Strategic value of the customer base and rational acquisition/retention investment levels by ICP tier and product line.

Common Mistakes: Calculating only an overall average, excluding cost-to-serve, and treating CLV as static rather than updating as retention/expansion performance changes.

White Space Coverage

KPI Type	Indicator	Owner	Review Cadence
Health KPI	**Leading**	**Account Management / Customer Success / RevOps**	**Quarterly**

Definition: The percentage of available expansion opportunity within existing accounts that has been identified, assigned to an owner, and entered into the pipeline as an active or near-term opportunity.

Calculation: Identified white space opportunities with an assigned owner and active pipeline entry ÷ total white space opportunities identified across the account base. Typically updated during quarterly account planning.

What It Predicts: Completeness of the expansion motion. Low coverage indicates weak account mapping or failure to convert analysis into pipeline; high coverage with low close rates indicates qualification/execution issues.

Common Mistakes: Skipping formal white space analysis, not assigning owners, and confusing identification with pursuit (the KPI should track pipeline entry, not just analysis completion).

🎯 Section 4: Pipeline and Forecast Health KPIs

Pipeline and forecast health KPIs measure the integrity of the revenue prediction and pipeline management systems. These metrics separate teams that can plan with confidence from teams that are perpetually surprised at quarter close.

Forecast Accuracy

KPI Type	Indicator	Owner	Review Cadence
Health KPI	**Lagging**	**CRO / RevOps**	**Monthly (close review)**

Definition: The degree to which forecasted revenue matches actual closed revenue over a defined period—measured at rep, manager, and total-team levels. Forecast accuracy is a KPI of operating discipline and data integrity, not just sales performance.

Calculation: Absolute value of (actual revenue − forecasted revenue) ÷ forecasted revenue, expressed as % variance. Compare the week-8 and week-4 forecasts to final actuals; track separately by forecast category (e.g., commit vs. best case).

What It Predicts: Reliability of the forecast as an input for finance, hiring, inventory, and executive decision-making. Persistent variance (e.g., >15% at week 8) signals structural issues in stage discipline, qualification, or CRM hygiene.

Common Mistakes: Measuring only at the total-company level (hides rep/manager patterns), not comparing early-quarter forecasts to outcomes, and treating accuracy as a reporting problem instead of a process/accountability problem.

Stage Conversion Rate

KPI Type	Indicator	Owner	Review Cadence
Health KPI	**Leading**	**Sales Manager / RevOps**	**Monthly (by stage)**

Definition: The percentage of opportunities that advance from one defined pipeline stage to the next within a benchmark timeframe—reveals where deals are progressing normally vs. stalling systematically.

Calculation: Opportunities that advanced to the next stage in the period ÷ opportunities in the prior stage at the start of the period, expressed as a %. Track each stage transition separately (Stage 1→2, 2→3, etc.) and compare to historical benchmarks by product line and rep.

What It Predicts: Where pipeline is breaking and which interventions are needed (qualification, pricing, proposal quality, competitive positioning). A sustained drop in a specific transition is an early warning before close rates deteriorate.

Common Mistakes: Tracking only final close rate, not establishing benchmarks before judging performance, and reporting only team averages (which hides coaching opportunities by rep/segment).

Slippage Rate

KPI Type	Indicator	Owner	Review Cadence
Health KPI	**Lagging**	**Sales Manager / RevOps**	**Monthly (post-close)**

Definition: The percentage of opportunities forecast to close in a given period that were pushed to a future period. Slippage is one of the most honest indicators of forecast discipline and pipeline qualification quality.

Calculation: Opportunities with a close date in the prior period that did not close won/lost and were moved to a future close date ÷ total opportunities forecast to close in the prior period, expressed as a %.

What It Predicts: Future forecast reliability and whether stage advancement reflects real deal progress vs. premature optimism. Slippage above 20% in a quarter typically indicates weak stage exit criteria or inconsistent enforcement.

Common Mistakes: Blending slipped deals with lost deals, allowing slipped deals to remain in the same stage without re-qualification, and not segmenting by rep/product/deal size to isolate the root cause.

Rate Card Realization

KPI Type	Indicator	Owner	Review Cadence
Health KPI	**Lagging**	**CRO / VP Sales / Finance**	**Monthly (segmented)**

Definition: The percentage of standard rate card value actually collected after discounts, value-adds, make-goods, and other concessions. A direct measure of pricing discipline and deal quality in media/events monetization models.

Calculation: Actual net revenue received ÷ rate card value of the same products/packages, expressed as a %. Track by product line, account tier, and rep to identify where discounting is structural vs. situational.

What It Predicts: Margin performance and long-term integrity of the pricing model. A declining realization rate is often the earliest financial signal of commoditization, misaligned packaging, or incentives that reward volume over value.

Common Mistakes: Reporting only gross revenue without rate card context, not tracking by rep/product (hides patterns), and allowing rate cards to become overly complex—inviting customization and default discounting.

CRM Compliance Rate

KPI Type	Indicator	Owner	Review Cadence
Health KPI	**Leading**	**RevOps**	**Weekly**

Definition: The percentage of active opportunities that meet defined data completeness and freshness standards in the CRM. High compliance is a prerequisite for reliable forecasting, signal detection, and coaching.

Calculation: Active opportunities with all required fields populated (e.g., stage, close date updated within 14 days, next step documented, primary contact identified, amount current) ÷ total active opportunities, expressed as a %. Define required fields by stage (not one blanket standard).

What It Predicts: Trustworthiness of every other pipeline KPI. Compliance below 70% typically means pipeline coverage, velocity, and forecast calls are built on unreliable inputs.

Common Mistakes: Not defining stage-specific requirements, publishing compliance without tying it to manager coaching/accountability, and treating compliance as admin work instead of forecast integrity.

Deal Push Rate

KPI Type	Indicator	Owner	Review Cadence
Health KPI	**Leading**	**Sales Manager / RevOps**	**Weekly**

Definition: The percentage of deals in the current forecast that have had their close date pushed at least once in the current period. A real-time, more actionable version of slippage rate.

Calculation: Active opportunities where the close date was moved forward at least once in the current quarter ÷ total active opportunities, expressed as a %. Track separately for commit vs. best-case categories to isolate the highest forecast risk.

What It Predicts: Forecast accuracy and the reliability of rep close-date assessments. A commit-category push rate above 30% is a strong signal that forecast standards are not being enforced or that qualification is weak.

Common Mistakes: Reviewing only at period end, not separating by forecast category, and not tying push patterns to rep-level coaching and stage-exit enforcement.

⚙️ Section 5: Revenue Operations KPIs

Revenue operations KPIs measure the economic efficiency of the revenue-generating system: the cost to acquire and retain customers, sales productivity, and profitability by product and segment. These KPIs connect revenue performance to business model sustainability and investment decisions.

Customer Acquisition Cost

KPI Type	Indicator	Owner	Review Cadence
Performance KPI	**Lagging**	**CFO / CMO / CRO**	**Quarterly**

Definition: The fully loaded cost of acquiring a new customer, including sales and marketing salaries, program spend, technology, events, and allocated overhead. Most meaningful when compared to customer lifetime value to validate unit economics.

Calculation: Total sales & marketing spend in the period ÷ number of new customers acquired in the period. For precision, separate CAC for new logos vs. cost per expansion dollar; track LTV:CAC ratio (often a minimum target of 3:1).

What It Predicts: Economic sustainability of the go-to-market model. Rising CAC without corresponding CLV improvement is an early warning that growth will become capital-inefficient.

Common Mistakes: Excluding loaded sales costs and RevOps support, reporting CAC without CLV context, and blending new-logo CAC with expansion (very different cost structures).

Revenue per Seller

KPI Type	Indicator	Owner	Review Cadence
Performance KPI	**Lagging**	**CRO / VP Sales / Finance**	**Quarterly**

Definition: The total revenue closed by each seller in a period—often enhanced with discounting or margin adjustments to reflect productive value generation, not just volume.

Calculation: Closed-won revenue attributed to each seller in the period. For a margin-adjusted view: (closed-won revenue) × (rate card realization rate for that seller's deals). Compare against quota, prior year, and peer benchmarks by territory type.

What It Predicts: Sales productivity and whether enablement, territory design, and compensation are producing efficient output. Large variance within similar territories often indicates coachable execution gaps.

Common Mistakes: Using only quota attainment (volume) without margin context, comparing sellers across unequal territories/tier mixes, and treating the KPI as evaluative only instead of a coaching input.

Salesperson Profitability

KPI Type	Indicator	Owner	Review Cadence
Performance KPI	**Lagging**	**CRO / CFO / RevOps**	**Quarterly**

Definition: The gross margin generated by a salesperson's book of business minus the all-in cost of that salesperson (base, commission, benefits, and allocated support). Two sellers can hit the same quota with very different profitability profiles.

Calculation: (Gross margin from revenue closed by the seller in the period) − (all-in compensation cost + allocated RevOps/sales support). Compare to peers in similar territories and to quota expectations.

What It Predicts: True economic contribution by seller and whether the compensation model is aligned to profitable growth. Helps identify when discounting, deal mix, or service-heavy packages are eroding profitability.

Common Mistakes: Never computing it (managing only to quota), using gross revenue instead of margin net of delivery costs, and comparing across sellers without adjusting for territory and market conditions.

Lead-to-Cash Cycle Time

KPI Type	Indicator	Owner	Review Cadence
Health KPI	**Lagging**	**RevOps / Finance / Sales Operations**	**Quarterly**

Definition: The total time from when a lead enters the system to when cash is received from the resulting customer. Captures the full revenue cycle: qualification, selling, contracting, invoicing, and payment.

Calculation: Cash receipt date − initial lead creation date (calendar days) for each closed-won account. Track median (to reduce outlier distortion) and decompose into sub-cycles: lead→opportunity, opportunity→close, close→invoice, invoice→cash.

What It Predicts: Cash flow efficiency and operational friction across the revenue process. Long cycle times often indicate contract, billing, or collections bottlenecks after deals are won.

Common Mistakes: Tracking only lead-to-close (ignoring close-to-cash), using mean instead of median without outlier handling, and not decomposing the cycle—making root cause identification impossible.

Gross Margin by Product and Segment

KPI Type	Indicator	Owner	Review Cadence
Performance KPI	**Lagging**	**CFO / CRO / Product Leadership**	**Quarterly**

Definition: Revenue by product line or customer segment minus the direct costs required to deliver it, expressed as a percentage of revenue. Reveals which revenue streams are truly profitable vs. cross-subsidized.

Calculation: (Revenue from product/segment − direct delivery costs) ÷ revenue, expressed as a %. Direct costs may include production, event ops, fulfillment, platform costs, and proportional CS/ops headcount dedicated to that product.

What It Predicts: Portfolio sustainability and pricing adequacy. Declining margin is often the earliest signal of rising delivery costs, commoditization, or discounting pressure that won't be visible in revenue totals alone.

Common Mistakes: Reporting only company-level margin, under-allocating delivery costs to products, and failing to use margin insights to drive packaging and pricing decisions.

📋 Quick Reference: KPI Index

KPI Name	Section	Primary Role	Review Cadence
Pipeline Coverage Ratio	New Business	CRO / Sales Mgr	Weekly
Win Rate by Segment	New Business	CRO / RevOps	Monthly
Average Sales Cycle Length	New Business	Sales Mgr / RevOps	Monthly
Lead-to-Opportunity Conversion Rate	New Business	Marketing / RevOps	Monthly
New Logo Count	New Business	CRO / VP Sales	Monthly / Quarterly
Cost Per Qualified Opportunity	New Business	Marketing / RevOps / CFO	Quarterly
Pipeline Velocity	New Business	CRO / RevOps	Weekly
Gross Revenue Retention Rate	Retention	CRO / VP CS	Monthly
Net Dollar Retention	Retention	CEO / CRO / CFO	Monthly / Quarterly
Sponsor and Advertiser Retention Rate	Retention	VP CS / Acct Mgmt	Monthly
Campaign Performance Score	Retention	CSM / Campaign Ops	Weekly
At-Risk Revenue	Retention	RevOps / CS Lead	Weekly
Days to Renewal Decision	Retention	Acct Mgr / CSM	Per account

Revenue Leakage	Retention	RevOps / Finance	Quarterly
Expansion Revenue Rate	Expansion	CRO / CS Lead	Monthly
Products per Account	Expansion	CS / Acct Mgmt	Quarterly
Expansion Pipeline Value	Expansion	Sales / CS / RevOps	Weekly
Customer Lifetime Value	Expansion	CFO / CRO / RevOps	Quarterly
White Space Coverage	Expansion	Acct Mgmt / CS	Quarterly
Forecast Accuracy	Forecast	CRO / RevOps	Monthly
Stage Conversion Rate	Forecast	Sales Mgr / RevOps	Monthly
Slippage Rate	Forecast	Sales Mgr / RevOps	Monthly
Rate Card Realization	Forecast	CRO / VP Sales / Finance	Monthly
CRM Compliance Rate	Forecast	RevOps	Weekly
Deal Push Rate	Forecast	Sales Mgr / RevOps	Weekly
Customer Acquisition Cost	RevOps	CFO / CMO / CRO	Quarterly
Revenue per Seller	RevOps	CRO / VP Sales / Finance	Quarterly

Salesperson Profitability	RevOps	CRO / CFO / RevOps	Quarterly
Lead-to-Cash Cycle Time	RevOps	RevOps / Finance	Quarterly
Gross Margin by Product and Segment	RevOps	CFO / CRO	Quarterly
Qualified Pipeline Value	New Business	RevOps	Weekly
Pipeline Creation Rate	New Business	Marketing / SDR Lead	Weekly
SQL Acceptance Rate	New Business	Sales / Marketing	Monthly
Opportunity-to-Win Conversion Rate	New Business	Sales Leadership	Monthly
Average Deal Size	New Business	CRO / VP Sales	Monthly
ICP Penetration Rate	New Business	Marketing / Sales	Quarterly
Renewal Rate (by Revenue Stream)	Retention	CS Leadership	Monthly
Customer Coverage	Retention	RevOps / CS Ops	Monthly
Expansion Attach Rate	Expansion	Acct Mgmt	Quarterly
Multi-Year Renewal Rate	Retention	Acct Mgmt / CS	Quarterly
NRR by Cohort	Retention	CFO / RevOps	Quarterly
Sales Capacity Utilization	RevOps	RevOps / Sales Leadership	Quarterly
Quota Attainment Rate	RevOps	Sales Leadership	Monthly
Mktg Sourced Pipeline %	New Business	CMO / RevOps	Monthly

🎓 About The Revenue Room™ Bootcamp

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 heather@h2klabs.com

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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