

REVENUE OPERATIONS

Top KPIs to track, department by department

The metrics, definitions, and benchmarks that keep Marketing, Sales, Executive, CSM, and Finance aligned on the same numbers.

48%

of companies struggle with data quality, making dashboards unreliable

70%

of sales say their CRM doesn't meet their reporting needs

30%

say their CRM is too complex or inefficient for proper KPI usage

WHY IT MATTERS

Every team needs its own scoreboard

Marketing

Measure campaign effectiveness and optimize lead generation.

Sales

Monitor performance, forecast revenue, improve conversion.

Executive

Drive strategic decisions aligned with business goals.

CSM

Reduce churn, increase retention, grow accounts via upsell.

Finance

Control costs, measure profitability, ensure sustainability.

BEST PRACTICES TO STRENGTHEN KPI RELIABILITY

✓ DOs — what to implement

Automate data capture whenever possible

Reduce manual errors, ensure real-time updates.

Define KPI ownership and alignment

Each metric has a clear owner, linked to business goals.

Standardize definitions across departments

Align on what each KPI means (e.g. "SQL" for Sales ≠ Marketing).

Make KPIs visible and actionable

Role-tailored dashboards, with weekly or monthly reviews.

Track trends, not just snapshots

Focus on evolution over time to spot early signals.

✗ DON'Ts — what to avoid

Rely on manual updates

Leads to outdated, inconsistent, or incomplete CRM data.

Use too many disconnected KPIs

Dilutes focus and causes reporting fatigue.

Ignore feedback from users

Frontline teams often spot irrelevant or overly complex metrics.

Set KPIs in isolation

Without cross-team input, you risk optimizing the wrong things.

Confuse activity with outcomes

High volume ≠ high impact — always connect KPIs to business value.

BEST METRICS FOR FINANCE

METRIC	DEFINITION	AVG. BENCHMARK
Burn Rate	Monthly net cash outflow	Varies (based on runway goals)
CAC Payback Period	Time to recoup acquisition cost through gross margin	12–18 months (SaaS)
Monthly Recurring Revenue (MRR)	Total predictable recurring revenue each month	Growing 10–20% MoM (early-stage)
Annual Recurring Revenue (ARR)	Predictable yearly revenue from subscriptions	Core metric in SaaS valuation
Gross Churn Rate	% of customers lost per month or year	<5% monthly, <15% yearly (B2B)

BEST METRICS FOR EXECUTIVE (C-LEVEL)

METRIC	DEFINITION	AVG. BENCHMARK
Revenue Growth	Year-over-year % increase in revenue	20–30% (growing SaaS)
Net Revenue Retention (NRR)	Revenue kept from existing customers incl. upsell, minus churn	110–130% (SaaS benchmark)
Gross Margin	Revenue after cost of goods sold, as a %	70–80% (SaaS)
EBITDA Margin	Earnings before interest, tax, D&A, as a % of revenue	10–20% (mature companies)
Customer Lifetime Value (CLTV)	Predicted net profit from the full customer relationship	\$25,000–\$250,000 (B2B SaaS)

BEST METRICS FOR SALES

METRIC	DEFINITION	AVG. BENCHMARK
Win Rate	% of qualified opportunities converted into closed deals	Varies (based on runway goals)
Sales Cycle Length	Average time from lead to close	30–90 days (SMB), 90–180 (Enterprise)
Average Deal Size	Average value per closed deal	\$15k–\$50k (SaaS mid-market)
Quota Attainment	% of sales reps meeting their targets	60–70%
Pipeline Coverage Ratio	Pipeline value ÷ sales target	3–4x

BEST METRICS FOR MARKETING

METRIC	DEFINITION	AVG. BENCHMARK
Marketing Qualified Leads (MQLs)	Leads judged more likely to become customers based on intent or fit	Varies (based on runway goals)
MQL to SQL Conversion	% of MQLs turning into Sales Qualified Leads	10–30%
Cost per Lead (CPL)	Average cost to acquire a lead	\$30–\$150 (B2B SaaS)
Customer Acquisition Cost (CAC)	Cost to acquire a paying customer	\$1,000–\$15,000 (depending on ACV)
ROI on Campaigns	Return on marketing investment (revenue ÷ spend)	3:1 to 5:1

BEST METRICS FOR CSM

METRIC	DEFINITION	AVG. BENCHMARK
Net Revenue Retention (NRR)	Revenue retained from existing customers, incl. upsell, minus churn	110–130% (SaaS best-in-class)
Gross Churn Rate	% of customers lost over a given period (without upsell impact)	<5% monthly, <10–15% yearly
Customer Health Score	Composite score indicating satisfaction and renewal likelihood	Varies by model (color-coded or 0–100)
Renewal Rate	% of contracts renewed at end of term	85–95%
Expansion Revenue	% of revenue coming from upsells or cross-sells	20–40% (mature CSM orgs)
Onboarding Completion Rate	% of customers completing onboarding within a target timeline	80–90%
Time to Value (TTV)	Time between onboarding and clear business value	30–90 days (depending on solution)
CSAT	Customer satisfaction score, often 1–5 or 1–10	4.0–4.7 / 5
NPS (Net Promoter Score)	% Promoters – % Detractors from customer survey (0–10 scale)	+30 to +60 (B2B SaaS)

One reliable source for every KPI

EverReady captures the activity behind every metric, so each department reports from the same trustworthy data.

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