

REVENUE DATA RELIABILITY INDEX™

RDRI Methodology Overview

A clean CRM is not enough. A reliable CRM is what drives predictable revenue. The RDRI is the framework to measure, manage, and improve that reliability.

0–100

a single quantitative
reliability score

5

core dimensions, each
KPI-driven

73%

worked example RDRI in
this overview

INTRODUCTION

Clean data does not mean reliable data

Most organizations invest heavily in CRM data quality. But clean data does not necessarily mean reliable data. The Revenue Data Reliability Index (RDRI) is a structured methodology that measures how much your CRM data can be trusted, and returns a quantitative score from 0 to 100.

■ Forecasting accuracy

■ Pipeline execution

■ Revenue decisions

■ AI-driven use cases

The RDRI framework

The RDRI evaluates CRM data across five core dimensions, each measured with operational KPIs extracted directly from your CRM.



Completeness
20%



Accuracy
25%



Freshness
20%



Ownership clarity
15%



Execution consistency
20%

Scoring model

$RDRI = (Completeness \times 20\%) + (Accuracy \times 25\%) + (Freshness \times 20\%) + (Ownership \times 15\%) + (Execution \times 20\%)$

Each dimension
0-100

DIMENSION METHODOLOGY

The KPIs behind each dimension

1 • Completeness Are critical CRM fields properly populated?

Score = completion rate

Required fields completed

ICP fields on accounts

Valid professional email

≥1 contact role

Next Step populated

2 • Accuracy Does the data reflect reality?

Score = 100 - KPI%

Close date changed 2+ times

Forecast vs actual variance

Closed Won, no recent activity

Duplicate accounts / contacts

Late-stage amount changes

3 • Freshness Is the data up to date?

Score = 100 - KPI%

No activity in last 30 days

Opp age vs stage benchmark

Contacts not updated 6+ months

Accounts inactive 90+ days

Opps exceeding activity threshold

4 • Ownership clarity Is responsibility clearly defined?

Score = 100 - KPI%

Opps with assigned owner

Multiple owner changes

Accounts owned by inactive users

Workload balance across owners

Defined roles (AE, SDR, CSM)

5 • Execution consistency Are processes followed consistently?

Score = 100 - KPI%

Updated Next Step

Activity in each stage

Time per stage vs benchmark

Opps skipping stages

Opps without future tasks

WORKED EXAMPLE

From dimension scores to one RDRI

DIMENSION SCORES



$$(77 \times .20) + (69 \times .25) + (73 \times .20) + (81 \times .15) + (66 \times .20)$$

73%

Final RDRI · Moderate reliability

Interpretation scale

90–100

Highly reliable

75–89

Strong, minor gaps

60–74

Moderate, exec. risk

40–59

Low, forecast at risk

0–39

Critical issues

Diagnostic approach

1

Data extraction

KPI-level data pulled straight from the CRM.

2

KPI normalization

Each KPI mapped to a 0–100 reliability score.

3

Dimension analysis

Underperforming dimensions and their impact.

4

Root cause

Process, behavioral, or structural issues.

5

Benchmark

Compared to best-in-class RevOps standards.

KEY FINDINGS

What low RDRI scores reveal

Over-optimistic pipelines → accuracy issues

Stale late-stage opps → freshness issues

Undefined deal ownership → ownership issues

Inconsistent execution → execution issues

Roadmap to improve RDRI

PHASE 1

Stabilize

- Enforce critical field completion
- Clean inactive or duplicate records
- Reassign unclear ownership

→ Immediate data visibility

PHASE 2

Standardize

- Define stage exit criteria
- Align forecasting & close-date rules
- Set activity expectations per stage

→ Consistent execution

PHASE 3

Scale

- Automate capture & enrichment
- Deploy RDRI tracking dashboards
- Enable AI & predictive forecasting

→ Scalable RevOps



The RDRI shifts the question from “Is our data clean?” to “Can we trust our data to run the business?” — improving forecast accuracy, surfacing pipeline risk earlier, strengthening execution discipline, and unlocking reliable AI use cases.

IMPLEMENTATION

How to operationalize the RDRI



Recommended data structure: KPI name Raw value Score (0-100) Dimension Date



The EverReady approach

EverReady applies the RDRI directly on your CRM data to benchmark your current reliability level, identify the root causes of revenue leakage, provide actionable recommendations, and track improvements over time.

CONCLUSION

A clean CRM is not enough. A reliable CRM is what drives predictable revenue. The RDRI provides the framework to measure, manage, and continuously improve that reliability.

Measure your RDRI

We'll run the RDRI on your Salesforce data and show you exactly which dimensions to fix first.

Book my RDRI assessment →

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