Processes Required for Accurate Metrics

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	Process	How It Affects Metrics	Metrics Affected
ALL	**ICP & BP Definitions**	These definitions are crucial for the accuracy of all metrics. Unoptimized, they cause a domino effect all the way downstream, leading to skewed conversion rates, inaccurate forecasts, and unreliable retention metrics.	All metrics, from GTM Efficiency to Financial Metrics, Pipeline Generation Metrics, Pipeline Management Metrics, and CS Metrics (NRR) are affected by ICP/Personas
MARKETING & INBOUND PROCESSES	**Qualification Definitions**	Establishing clear MQL, SAL, SQL, and SQO criteria ensures leads are tracked correctly, preventing inflated pipeline numbers and misaligned sales expectations.	All Lead Generation and Conversion, Pipeline Generation Metrics, Pipeline Management Metrics, CAC, LTV:CAC, GTM Efficiency Ratio, GTM Efficiency Margin, Bookings, Growth Rate
	Lead Scoring & Routing	Assigning a structured system to score and route leads helps prioritize high-value leads, aligning marketing and sales on measurable conversion benchmarks.	Inbound Lead and Pipeline Generation Metrics, Inbound Pipeline Management Metrics, CAC, LTV:CAC, GTM Efficiency Ratio, GTM Efficiency Margin, Bookings, Growth Rate
	Lead Management	A defined process for lead response times and follow-ups ensures lead conversion rates don't become artificially low due to poor lead management.	Inbound Lead Conversion, Pipeline Generation Metrics, Close Rate, Sales Cycle, Pipeline Velocity, CAC, LTV:CAC, GTM Efficiency Ratio, GTM Efficiency Margin, Bookings, Growth Rate, Magic Number
	Funnel Segmentation	Segmenting your funnel provides deeper insight into where leads and revenue are coming from, preventing misleading blended metrics and inaccurate forecasts.	All Inbound Lead Conversion and Pipeline Generation Metrics, Pipeline Management Metrics, CAC, LTV:CAC, Magic Number
SALES & PIPELINE PROCESSES	**Targets & Quotas**	Thoughtful targets and quotas drive the rest of our sales metrics as we determine how much pipeline, what Close Rate, etc. we need in order to hit those numbers. This is required to measure whether we're on track or not and to make decisions about investments in the business.	All Pipeline Generation Metrics, All Pipeline Management Metrics, CAC, LTV:CAC, Magic Number, GTM Efficiency Ratio & Margin, Growth Rate, Bookings, Gross Margin, Opex Profile, Rule of 40
	Capacity & Territory Planning	Giving reps the right number of the right accounts ensures we can accurately measure their performance and that suboptimal metrics are not simply due to poor territories.	Outbound Pipeline Generation Metrics, Pipeline Management Metrics, CAC, CAC Ratio, LTV:CAC, GTM Efficiency Ratio & Margin
	Outbound Prospecting Process	Standardizing outreach cadences, touchpoints, and tracking prevents inconsistent engagement data and ensures outbound pipeline reporting is reliable.	Outbound Pipeline Generation Metrics, Pipeline Management Metrics, CAC, LTV:CAC, Magic Number, GTM Efficiency Ratio & Margin, Growth Rate
	Sales Process & Sales Methodology	A structured sales process with defined stages ensures the pipeline reflects real opportunities and is a prerequisite for accurate Close Rates, Sales Cycles, ASP and accurate forecasting.	All Pipeline Management Metrics, CAC, LTV:CAC, Magic Number, GTM Efficiency Ratio & Margin, Growth Rate
	Pipeline Review Process	A structured approach to reviewing deals ensures pipeline data integrity, preventing reps from under or over-reporting or misclassifying opportunities.	All Pipeline Management Metrics, CAC, LTV:CAC, Magic Number, GTM Efficiency Ratio & Margin, Growth Rate
	Sales Coaching Cadences	Regular, data-driven coaching improves rep performance, ensuring that sales metrics truly reflect skill development and deal movement.	All Pipeline Generation Metrics, All Pipeline Management Metrics, CAC, LTV:CAC, Magic Number, GTM Efficiency Ratio & Margin, Growth Rate, Bookings, Gross Margin, Opex Profile, Rule of 40
CUSTOMER SUCCESS PROCESSES	**Sales Handoff & Onboarding Process**	A structured handoff and onboarding process ensures CS teams receive key customer data and do not cause unnecessary churn or lose expansion opportunities due to misssed steps at the start of the customer relationship.	Gross Retention, NRR, CSAT/NPS, GTM Efficiency Ratio & Margin, Growth Rate
	Account Health Monitoring	Systematic tracking of product usage and account engagement ensures that churn, NPS, and expansion signals are based on real customer behavior and not artificially affected due to neglect.	Gross Retention, NRR, CSAT/NPS, GTM Efficiency Ratio & Margin, Growth Rate
	Customer Success Process	Defining proactive engagement strategies allows CS teams to accurately track adoption, churn risk, and expansion potential with less risk these numbers are artificially low due to poor customer management.	Gross Retention, NRR, CSAT/NPS, GTM Efficiency Ratio & Margin, Growth Rate
	Expansion & Upsell Process	A defined strategy for identifying and managing upsell opportunities ensures expansion metrics are not artificially low due to poor execution.	Expansion ARR, Close Rate, Sales Cycle, ASP, GTM Efficiency Ratio & Margin, Growth Rate
	Renewals Process	Managing renewals proactively ensures churn metrics are accurate, reducing unnecessary last-minute losses that could skew retention and revenue forecasting.	Gross Retention, NRR, CSAT/NPS, GTM Efficiency Ratio & Margin, Growth Rate
	NRR Targets & Optimization	Setting and optimizing NRR goals ensures CS efforts are data-driven, aligning expansion, retention, and customer health with measurable revenue impact.	Gross Retention, NRR, CSAT/NPS, GTM Efficiency Ratio & Margin, Growth Rate