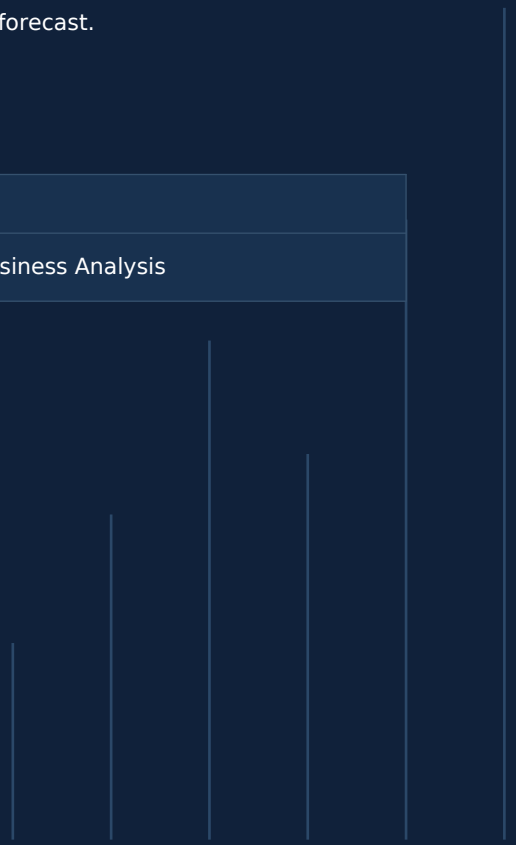
FLAGSHIP CASE STUDY 02

Revenue Operations & Sales Performance System

A generalized B2B decision system for diagnosing funnel leakage, improving pipeline governance, and producing a defensible forecast.

AUTHOR	CASE TYPE	FOCUS
Nina Suico	Portfolio simulation	Revenue Operations | Sales Analytics | Business Analysis



01 / EXECUTIVE BRIEF

The revenue problem is not simply conversion

SCENARIO

A multi-market B2B company has enough activity to appear healthy, but management cannot explain whether the quarter is genuinely on track. CRM stages are inconsistently defined, opportunity age is ignored, and forecast categories reflect optimism more than evidence.

MANDATE

Build a management system that shows where revenue leaks, which opportunities deserve attention, how much pipeline is credible, and which operating controls improve forecast reliability.

BUSINESS QUESTION

What should leadership do next week to improve the probability of hitting the quarter, rather than merely describing last month?

THE SYSTEM MUST ANSWER

Funnel health

Where volume is lost and whether leakage is structural or segment-specific.

Pipeline quality

Whether open value has owners, next steps, evidence, and realistic dates.

Velocity

Where time accumulates and which stage-age exceptions require intervention.

Forecast

What is committed, probable, possible, and unsupported by current evidence.

Evidence note. The method is informed by Nina Suico's documented work in sales operations, CRM workflows, qualification, routing, handoffs, enablement, reporting, and proposed sales architecture. This case is independent of the Retail Group engagement. All figures are synthetic.

A forecast is only as credible as its operating evidence

The model separates activity, stage movement, opportunity value, buyer evidence, and forecast judgment so that leadership can audit the story behind the number.

LEAD
Source, segment, market, first-touch date

ACCOUNT
Industry, size, territory, relationship status

OPPORTUNITY
Value, owner, stage, probability, dates

ACTIVITY
Meeting, email, task, next step, outcome

FORECAST
Category, confidence, evidence, risk reason

OUTCOME
Win/loss date, reason, competitor, cycle time

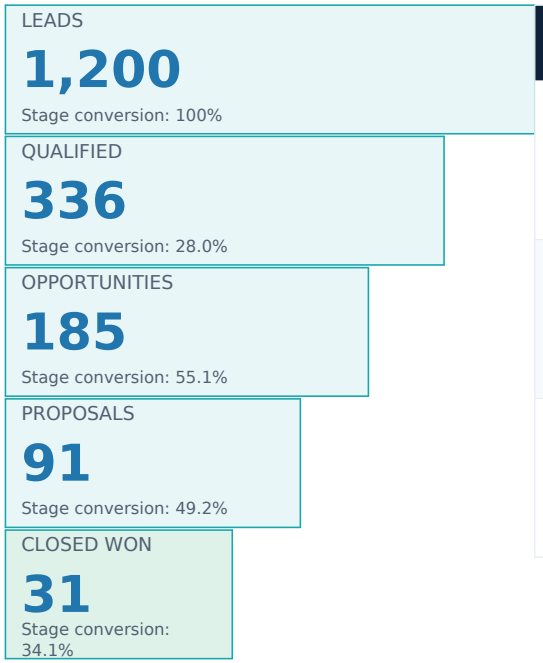
Decision architecture

Management question	Required measure	Decision enabled
Where does demand disappear?	Stage conversion by source, segment, market, and owner.	Change targeting, qualification, or enablement.
Which deals are quietly dying?	Stage age, last activity, next-step status, close-date movement.	Intervene, requalify, or remove false pipeline.
How much revenue is credible?	Forecast category, evidence score, weighted value, historical calibration.	Set resource, coverage, and recovery actions.
Why do we lose?	Structured loss reason, decision status, competitor, commercial constraint.	Improve offer, process, qualification, or timing.

03 / FUNNEL DIAGNOSTIC

Volume is healthy. Progression is not.

Synthetic 180-day cohort: 1,200 leads tracked from first capture through closed won.



Leakage point	Diagnostic interpretation	Management response
Lead to qualified	72% exit before qualification. Source quality and response time require separation.	Score by ICP fit, source, intent, and speed-to-lead.
Opportunity to proposal	Half of opportunities do not reach a commercial proposal. Discovery quality may be inconsistent.	Require problem, value, authority, and decision process before advancement.
Proposal to win	65.9% of proposals do not close won. Loss reason quality becomes essential.	Separate no-decision, commercial, fit, timing, and competitor losses.

Structured loss mix for 60 synthetic closed-lost opportunities

32%	23%	18%	15%	12%
No decision	Budget	Fit	Timing	Competitor

Open value is not the same as usable pipeline

The quality layer tests whether every opportunity contains enough evidence to support management action and forecast judgment.

DATA COMPLETENESS	NEXT STEP HYGIENE	STAGE AGE HEALTH	CLOSE-DATE STABILITY	QUALIFICATION EVIDENCE
78%	**71%**	**63%**	**76%**	**54%**
Required fields complete	Dated next step present	Within stage SLA	Not pushed twice or more	Buyer problem, authority, process captured

58 / 100	Baseline Pipeline Quality Score Weighted composite: completeness 25, next-step hygiene 20, stage-age health 20, close-date stability 15, qualification evidence 20.	Interpretation The pipeline contains material value, but evidence quality is too weak for a confident forecast.

Exception rules

Trigger	Automatic management action
No next step for 7 days	Owner review. Reconfirm buyer action or remove from active forecast.
Stage age beyond SLA	Exception status required. Advance, recycle, close lost, or escalate.
Close date pushed twice	Requalification with evidence. Forecast category cannot remain Commit by default.
Value changed by more than 20%	Commercial rationale and approval recorded before forecast refresh.

Convert optimism into an evidence-weighted decision

Synthetic open pipeline: $2.84M against a $1.25M quarterly target. Headline coverage is 2.27x, but evidence-weighted expected value is $823K.

Category	Open value	Evidence rate	Expected value	Required proof
Commit	$420K	80%	$336K	Confirmed decision process, commercial fit, dated buyer action.
Best case	$540K	45%	$243K	Material buyer progress with one unresolved risk.
Upside	$780K	20%	$156K	Qualified need, but timing or authority remains uncertain.
Pipeline	$1.10M	8%	$88K	Early evidence. Excluded from the operating commit.

$1.25M	$823K	$427K	2.27x
Quarter target	Evidence-weighted value	Recovery gap	Headline coverage

Segment performance

Segment	Created opps	Pipeline value	Win rate	Median cycle	Decision
Enterprise	22	$1.20M	27%	92 days	Protect focus. Reduce concentration and stage-age risk.
Mid-market	67	$1.05M	36%	61 days	Best balance. Prioritize repeatable qualification and proof.
SMB	96	$590K	29%	34 days	Automate low-value work and tighten fast disqualification.

06 / REVENUE OPERATING SYSTEM

Govern the decisions behind the dashboard

Reporting improves only when stage rules, ownership, evidence, and review cadence become part of normal execution.

1
CAPTURE
Source and minimum data

2
QUALIFY
Fit, problem, value, authority

3
VALIDATE
Decision process, timing, risk

4
PROPOSE
Scope, terms, commercial proof

5
COMMIT
Buyer action and closure plan

6
LEARN
Win/loss evidence and feedback

Management cadence

Cadence	Purpose	Core decisions	Owner
Daily exception queue	Resolve data, age, and next-step failures.	Advance, recycle, close, or escalate.	Sales Ops + rep
Weekly pipeline review	Improve deal quality and resource focus.	Deal strategy, risk, support, evidence gaps.	Sales leader
Weekly forecast call	Commit a defensible operating view.	Category changes, gap actions, downside exposure.	Revenue leader
Monthly funnel review	Find structural performance patterns.	Targeting, process, enablement, capacity, offer.	RevOps + leadership
Quarterly calibration	Test whether probabilities match outcomes.	Probability, thresholds, definitions, governance.	RevOps

07 / 90-DAY DELIVERY ROADMAP

Build trust before adding sophistication

The sequence establishes common definitions and data discipline before advanced forecasting or automation.

DAYS 1-15	BASELINE	Agree funnel definitions, data fields, ownership, target, and forecast categories.	Output: Data dictionary, stage charter, baseline scorecard.
DAYS 16-35	CLEAN & CONTROL	Resolve duplicates, missing owners, stale dates, and unsupported stages.	Output: Quality rules, exception queue, governance SOP.
DAYS 36-60	OPERATE	Launch pipeline, forecast, and funnel reviews with evidence-based decisions.	Output: Review packs, action log, manager coaching guide.
DAYS 61-90	CALIBRATE	Compare forecast expectations to outcomes and tune probabilities and thresholds.	Output: Calibration report, KPI dashboard, benefits-validation plan.

WHAT A HIRING MANAGER CAN INFER	ROLE ALIGNMENT
Nina can translate CRM activity into an operating diagnosis, distinguish pipeline volume from pipeline credibility, define decision-grade KPIs, and connect analysis to practical management routines without presenting synthetic or proposed outcomes as client results.	Revenue Operations Sales Operations Commercial Analytics Business Analysis GTM Operations

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