PRACTICAL TEMPLATE / SELF-GUIDED RESOURCE

90-Day RevOps Roadmap

A sequenced discovery-to-delivery framework with owners, dependencies, KPIs, and acceptance gates.

How to use this roadmap

Treat the sequence as an example, not a universal implementation plan. Replace initiatives, owners, dependencies, and targets after discovery. Avoid promising a specific revenue lift before baseline measurement.

Operating principles

- **Baseline before claims:** establish definitions, data coverage, and reconciliation before quoting KPI improvements.
- **One accountable owner per deliverable:** cross-functional input is welcome; ownership must be explicit.
- **Human oversight:** automate routine exceptions, but route anomalous or consequential decisions to a human reviewer.
- **Small releases:** stage deployment, validate in production, and maintain a rollback plan.

Days 1-30 / Diagnose and align

Workstream	Key activities	Concrete outputs
Business and GTM	Interview Sales, Marketing, Customer Success, Finance, IT; document revenue motion and handoffs.	Stakeholder map; success criteria; decision log
Systems and data	Inventory CRM, billing, automation, analytics and integrations; trace system-of-record ownership.	Architecture map; field/source inventory; integration risks
Data quality and reporting	Sample duplicates, lifecycle gaps, missing owners and stale opportunities; compare key metrics.	Baseline scorecard; KPI dictionary v1; discrepancy log
Prioritization	Rank issues by business impact, evidence, effort and dependency; identify one pilot.	90-day prioritized backlog; scoped pilot charter

Days 31-60 / Design and deliver

Workstream	Key activities	Concrete outputs
CRM governance	Define required fields, validation, lifecycle stages and owner handoffs.	Approved field and lifecycle standards; QA rules
Integrations	Define mapping, keys, deduplication, error queues and reconciliation controls.	Mapping spec; monitored test flow; exception routing
Reporting	Publish baseline dashboards on agreed logic; reconcile totals with Finance.	Trusted KPI dashboard v1; reconciliation notes
Pilot automation	Test one high-value workflow with human-in-the-loop escalation.	Pilot launch; test evidence; rollback plan

Days 61-90 / Measure and institutionalize

Workstream	Key activities	Concrete outputs
Performance	Measure pilot against baseline; explain variance and coverage.	Pilot results and limitations; adoption indicators
Operationalize	Schedule QA, exception reviews, change requests and ownership audits.	Runbook; incident response; SLA ownership
Enablement	Train teams on definitions, source logic and reporting workflows.	Office hours; documented adoption plan
Planning	Sequence the next wave with costs, risks and dependencies.	Quarterly roadmap; decision-ready recommendations

Metrics to baseline (select those relevant)

Metric	Operational definition / caveat
Lead response time	Median business hours from qualified inquiry to first meaningful response.
Lifecycle completeness	Share of eligible CRM records with required stage, owner and timestamps.
Opportunity hygiene	Share of opportunities meeting stage, amount, close-date and next-step standards.
Revenue reconciliation	Difference between CRM closed-won and Finance recognized or invoiced revenue, with scope alignment.
Campaign measurement coverage	Share of applicable external campaign links using approved taxonomy.

Metric	Operational definition / caveat
Data pipeline reliability	Integration success rate, queue age, and unresolved exception counts.

Risk register starter

Risk	Mitigation	Owner
Conflicting KPI definitions	Agree on dictionary, scope, and tie-out before dashboard rebuild.	_____
Inconsistent record IDs	Define stable keys, mapping exceptions, and duplicate handling.	_____
Limited technical capacity	Phase pilot; set dependent handoffs and escalation route.	_____
AI automation errors	Low-risk first; monitoring, human approval, audit trail.	_____

90-day acceptance / sign-off template

Gate	Evidence needed	Owner / status
30-day	Baselines, inventory, KPI definitions and approved priorities.	_____
60-day	Tested controls, published reporting pilot, sign-off log.	_____
90-day	Measured change, monitoring runbook, adoption and next backlog.	_____

Companion workbook: owner, priority, dependency, KPI, acceptance criteria and status are editable per initiative.