

Revenue Definition Operating Model Checklist

Domain Methods

WHAT THIS WORKSHEET IS FOR

Use this checklist before you choose a RevOps agency, embedded operator, or internal RevOps lead for revenue-definition cleanup. The goal is to pick the smallest model with enough authority to make the rules stick.

1. NAME THE DECISION BEING DAMAGED

- Revenue decision in pain: forecast / board reporting / budget allocation / pipeline review / compensation / other
- Definition or metric in scope: _____
- Meeting where the conflict shows up: _____
- Team currently carrying the manual workaround: _____

2. SCORE THE CLEANUP SHAPE

Score each item 1 to 3: 1 = clear, 2 = mixed, 3 = unclear or contested.

- Metrics in scope are named and limited.
- Tie-break owner is known and can make decisions.
- Source system or record of truth is known.
- Success condition for the next 60 days is concrete.
- After-launch owner is named.

3. READ THE SCORE

- 5 to 7 = project-ready: an agency project can work if sponsor cover is real.
- 8 to 11 = adoption-heavy: consider an embedded operator or a short diagnostic first.
- 12 to 15 = scope first: do not buy the model before the authority path exists.

4. MODEL FIT PROMPTS

- RevOps agency project: What deliverables can be accepted or rejected against a clear scope?

- Embedded operator: Which meetings, habits, or exception paths need close operating support?
- Internal RevOps lead: Which rule stewardship responsibilities will still matter next year?
- Stop and scope first: Which owner, decision, source, or success condition is still missing?

5. HANDOFF AND ADOPTION CHECK

- Who owns the definition after launch: _____
- Who owns the system logic: _____
- Who can approve exceptions: _____
- When will the rule be reviewed: _____
- What old spreadsheet, report, or caveat must be retired: _____

6. RECOMMENDED NEXT MOVE

- Chosen model: agency / embedded operator / internal lead / scope first
- First 30-day outcome: _____
- Risk if we choose too cheaply: _____
- Decision owner who signs off: _____

DOORWAY PATH

- Use Three Teams, Three Numbers when revenue, pipeline, or bookings definitions disagree across teams.
- Use Translate the Ask when the mandate is still too fuzzy to staff or vendor cleanly.