

The 'What Does Revenue Even Mean Here?' Workshop Guide

Domain Methods

Use this facilitation kit to align marketing, sales, finance, and RevOps on what 'revenue' means, which systems can be trusted, and which number belongs in leadership reporting.

Pre-work checklist

- Ask each team for its current revenue definition in one sentence.
- Collect the report/dashboard each team trusts most.
- Name the source system behind each number.
- Note which decision each team uses the number for.
- Ask what each team believes is wrong with the other numbers.

Recommended participants

- RevOps / operations owner
- Finance lead or CFO delegate
- Sales leader or CRO delegate
- Marketing leader or growth lead
- Data / analytics owner when they carry the reconciliation burden

90-minute agenda

1. Frame the problem: decide which number is fit for which decision.
2. Map the numbers: pipeline, bookings, ARR, MRR, recognized revenue.
3. Trace the system of record for the most contentious metric.
4. Decide definition, owner, use case, system of record, exclusions.
5. Choose the 2-4 metrics that need shared definitions now.
6. Lock the rollout plan and owners for follow-up work.

Metric guidance

- ARR: annualized recurring value for board/growth planning.
- MRR: monthly movement for operating cadence and expansion/contraction.
- Bookings: what has been sold/contracted for sales accountability.
- Recognized revenue: accounting reality for financial reporting.

Decision worksheet

For each metric, capture:

- Primary use case
- Canonical definition
- System of record
- Named owner
- Known exclusions / caveats

Rollout template