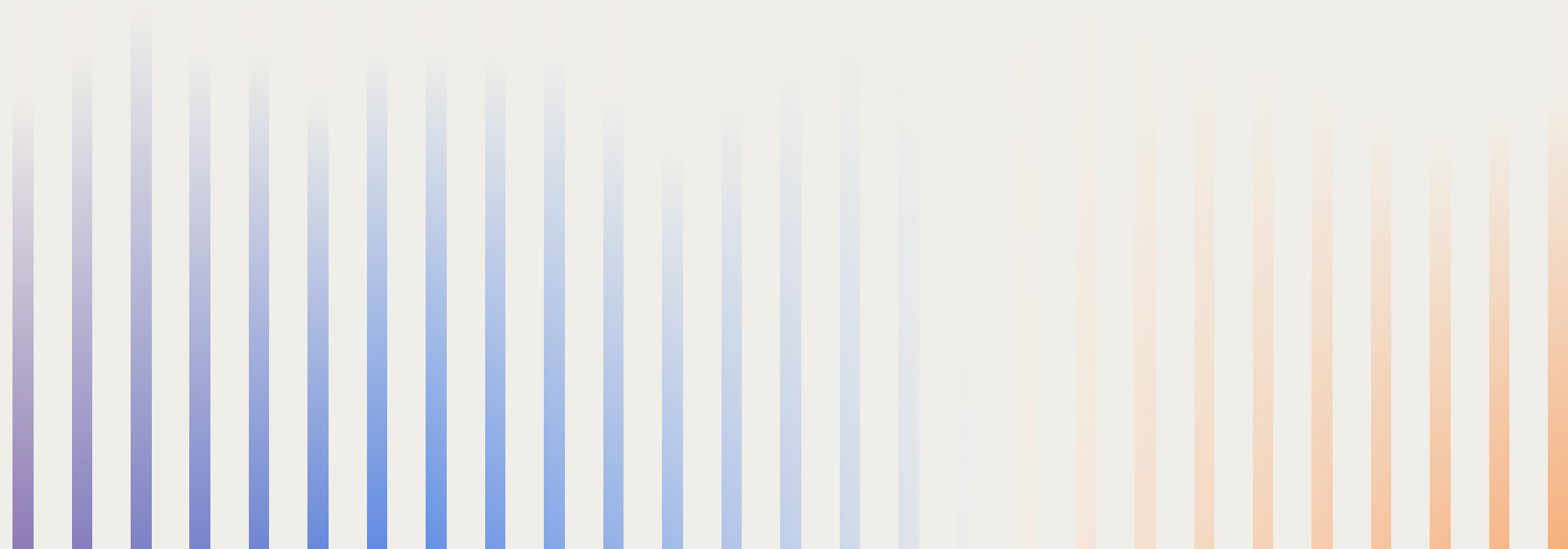


The strategic work your RevOps Team keeps pushing to next quarter

10 analyses that influence major decisions.
Most teams never get to them.



Contents

1 Weighted Pipeline Coverage.....	4
2 Forecast Accuracy Audit.....	5
3 CRM Reality Check.....	6
4 Rep Performance Distribution.....	7
5 Pipeline Source Win Rates.....	8
6 Win/Loss Patterns and Competitive Intelligence	9
7 QBR and Board Prep.....	10
8 Rep Time Allocation	11
9 Segment Performance Comparison	12
10 Renewal Risk from Conversation Signals.....	13



“Revenue leaders don’t lose time because they lack data. They lose time in the gap between seeing the data and deciding what to do about it. Von compresses that gap.”

Eric Choronzy
Chief Revenue Officer

Introduction

Most RevOps teams are buried in ad hoc requests, pipeline reviews, and forecast prep. The strategic analytical work that would actually change how the business runs never happens. The problem is never priority. It is always bandwidth.

This playbook covers 10 analyses that the best revenue teams run regularly but most never get to. For each one, we explain why it matters, what it does, and provide a starting prompt you can use as-is in Von or hand to your data science team as an analytical brief.

Most teams get to two or three of these per quarter. Teams with Von handle all 10 whenever they are needed.

1 | Weighted Pipeline Coverage

Why it matters

Raw coverage ratios treat all pipeline as equal, which means your coverage number is almost certainly overstating reality. Without weighting by source quality, rep conversion history, and deal stage, you cannot tell whether you are genuinely covered or over exposed heading into next quarter.

What it does

This analysis produces a weighted coverage number that reflects actual conversion probability rather than raw dollar totals. It also flags current-quarter deals that should push to next quarter based on weak activity signals and future-quarter deals with enough momentum to pull forward.

Starting prompt

Calculate pipeline coverage for next quarter. Weight each open opportunity by its source's historical conversion rate, its current stage, and its owner's win rate. Compare weighted pipeline to target. Flag where coverage is thinnest by segment and rep. Also flag current-quarter deals unlikely to close and future-quarter deals ready to pull forward.



"Von answers complex questions in seconds that used to take me hours, from pipeline analysis to deal risk assessment."

Taylor Kelly

Head of Revenue Operations

2 | Forecast Accuracy Audit

Why it matters

Consistent over-forecasting erodes board confidence. Consistent under-forecasting leaves money on the table in hiring and investment decisions. Most teams know their forecast is off but cannot pinpoint whether the variance is coming from specific reps, stages, or deal size bands.

What it does

This analysis compares committed forecasts to actuals over the last four quarters and breaks down exactly where the variance originates, so you can fix the specific input that is causing the miss rather than guessing.

Starting prompt

Audit forecast accuracy for the last 4 completed quarters. Compare committed forecast at each snapshot to actual closed-won revenue. Break variance down by rep, stage, and deal size band. Flag the top 5 reps by variance and the stages with the highest drop-off.



“Our insights have been nothing short of remarkable. Von minimizes the ramp-up time to get going on projects, and what used to take weeks of data gathering and analysis now happens in a single conversation.”

Tim Toller

Sr. RevOps Program Manager

3 | CRM Reality Check

Why it matters

Deals sit in the wrong stages. Close dates slip without updates. Dead opportunities stay open. Every decision built on CRM data is only as good as the data itself, and in most orgs, there is a meaningful gap between what the CRM shows and what is actually happening.

What it does

This analysis cross-references CRM fields against actual call recordings, email threads, and calendar data to produce a clear list of what needs correcting so your pipeline reflects reality.

Von user tip

Once you have the results, you can give Von the task of making the CRM updates directly, so the hygiene issues get fixed in the same session.

Starting prompt

Audit all open opportunities. Cross-reference stage, close date, next steps, and last activity against actual calls, emails, and calendar data. Flag deals with zero activity in 30 days still in commit, deals where close dates moved forward but engagement dropped, and next steps not updated in 2+ weeks.



“I use Von to review Gong calls and update MEDDPICC values in our CRM automatically.”

Chris Wright

Head of Revenue Operations

4 | Rep Performance Distribution

Why it matters

Most capacity planning, territory design, and quota setting assumes a normal distribution of rep performance. The data shows that distribution does not exist. If you are planning around the “average rep,” you are planning around a fiction, and your resource allocation reflects it.

What it does

This analysis plots your team’s actual performance distribution and shows where each rep sits. It identifies whether you have a bell curve or two clusters, and tracks movement between clusters quarter over quarter so you can see whether coaching investments are working.

For context, here is what Von’s research across B2B SaaS organizations has found:

BENCH MARK	VALUE
Revenue from top 30% of reps	+/- 5 points 70%
Per-rep output gap, top half vs. bottom half	4.2×
Reps in the “average” zone	19%
Pipeline conversion gap, top 20% vs. bottom 20%	5.3×

Starting prompt

Pull all closed-won new business from the last 5 fiscal years. Normalize each rep’s revenue against the org median and plot the distribution. Flag the percentage near median, revenue share from the top 30%, and quarter-over-quarter cluster movement. Compare to the benchmarks above.

5 | Pipeline Source Win Rates

Why it matters

If you are treating all pipeline equally in your forecast, you are overestimating what your team can close. AE-sourced, SDR-sourced, and marketing-sourced pipeline convert at different rates, and most teams have never quantified how different those rates are in their own org.

What it does

This analysis calculates win rate, deal size, cycle time, and expected revenue per pipeline dollar for each source, giving you the org-specific conversion data to weight your forecast accurately and make informed decisions about where to invest in pipeline generation.

For context, here is what Von's research across B2B SaaS organizations has found:

BENCHMARK	VALUE
AE-sourced win rate vs. SDR-sourced	2.5× higher
AE-sourced cycle time	17% faster
AE-sourced revenue per opportunity	2× higher

Starting prompt

Compare win rates by pipeline source for the last 2 fiscal years. For each source, calculate win rate, average deal size, cycle time, and expected revenue per pipeline dollar. Flag any source where the gap is widening. Compare to the benchmarks above.

Oyster

“A business review that took a full day now takes minutes.
We use Von as a revenue intelligence layer, combining
signals from Sales, CS, and product data to spot patterns and
opportunities faster.”

Fabiola Lopina García
Senior Data Analyst

6 | Win/Loss Patterns & Competitive Intelligence

Why it matters

Most win/loss analysis is anecdotal or based on close reasons reps select in the CRM. Those reasons are often incomplete, inconsistent, or wrong. Without understanding where in the process wins and losses actually diverge and which competitors are showing up, you are making sales process and enablement decisions based on guesswork.

What it does

This analysis uses the full dataset of closed deals plus call recordings to identify the stage where wins and losses structurally diverge, which competitors appear and how reps position against them, and which rep behaviors correlate with winning. The result informs process changes, battlecard updates, and coaching priorities.

Stating prompt

Compare all closed-won vs. closed-lost new business from the last 2 fiscal years. Analyze stage-to-stage conversion, meeting cadence, stakeholder breadth, and competitive mentions in calls. Identify where wins and losses diverge, top competitors in lost deals, and behavioral patterns in winning deals. Include verbatim quotes from calls.



“Win/loss analysis, competitive research, and trend identification now take minutes instead of days.”

Ellie Wilson

Director of Product Marketing, Qualified

7 | QBR and Board Prep

Why it matters

Every quarter, someone pulls data from five systems, reconciles numbers, and builds slides. It takes a week of manual work, and the output still relies on whatever reps logged in the CRM rather than what actually happened. The board narrative ends up being built on incomplete data.

What it does

This analysis does the cross-system synthesis automatically: CRM data for the numbers, call recordings for the reasons behind the numbers, and activity data for the leading indicators of what is coming next. The result is a board-ready narrative built from evidence rather than manual assembly.

Starting prompt

Build a QBR summary for this quarter. Include new logo ARR, expansion ARR, churn, win rate, average deal size, and sales cycle. Compare to prior quarter. Use call transcripts to categorize real win/loss reasons beyond CRM fields. Flag the top 3 risks heading into next quarter. Format as a slide deck.

Von user tip

Upload your existing slide template so the output matches your brand.



“I had a very tight turnaround for all my end-of-year things, and it would not have been possible to do the QBR, along with everything else at the end of year or end of quarter, if I didn’t have Von in place.”

Ted Ranney

Head of GTM Analytics

8 | Rep Time Allocation

Why it matters

Every sales leader believes their reps should spend more time selling. Few know how little time reps actually spend with customers. Without rep-by-rep data, you cannot identify who is buried in internal meetings, which teams have the worst ratios, or where to intervene to free up selling time.

What it does

This analysis calculates how each rep's day is actually spent: customer-facing meetings, internal meetings, and everything else. It flags reps below critical thresholds and shows trends over time.

For context, across orgs Von has studied, the average AE spends 1.2 hours per day with customers, which is 14% of the workday. 70% of AEs spend less than 1.5 hours per day in customer-facing meetings.

Starting prompt

Analyze calendar and meeting data for all quota-carrying AEs over the last quarter. For each rep, calculate hours per day in customer-facing meetings vs. internal meetings. Flag reps below 1 hour per day with customers. Compare across teams and show the trend vs. prior quarter.



“Von continues to delight our team by being an always-on admin or analyst that we can trust. It gets answers so much quicker versus somebody that might be in a meeting or off hours.”

Chris Hudson
Director of Revenue Technology

9 | Segment Performance Comparison

Why it matters

Aggregate numbers hide segment-level dynamics. A quarter that looks flat overall might include a segment that grew 30% and another that contracted 20%. Without segment-level visibility, you cannot allocate reps, pipeline investment, or leadership attention to the areas where it will have the most impact.

What it does

This analysis breaks performance down by segment and uses conversation data to explain why the trends are moving, so you can see which segments are growing, which are contracting, and what is driving the difference.

Starting prompt

Break down quarterly performance by segment. For each, calculate pipeline created, win rate, deal size, sales cycle, new logo ARR, and expansion ARR. Compare to prior quarter and prior year. For significant changes, analyze call recordings to identify what is driving the shift.



“Von lets me operate at full capacity. I have context across systems I don’t personally know inside and out, and Von bridges that without requiring me to become an expert in each tool.”

Jesse Meller

Head of Global Enablement and Operations

10 | Renewal Risk from Conversation Signals

Why it matters

Most renewal risk fields in the CRM are stale or optimistic. The actual risk signals live in conversations: sentiment shifts, competitor mentions, declining engagement frequency. Without surfacing these signals proactively, your team finds out about churn risk when it is too late to intervene.

What it does

This analysis reviews calls and emails across your renewal book to identify accounts showing risk signals that the CRM is not capturing. It ranks accounts by risk severity with specific evidence from conversations. Run this monthly or continuously for the most value.

Starting prompt

Review all open renewals closing in the next 2 quarters. Analyze calls and emails for each account over the last 6 months: sentiment shifts, declining engagement, competitor mentions, budget concerns. Compare conversation-based risk to the CRM risk field. Flag accounts where conversations suggest higher risk than the CRM indicates.



“Von lets me analyze actual conversation signals across our entire renewal book to identify the real reasons customers churn. This is analysis I previously couldn’t justify dedicating headcount to.”

Sydney Showalter Head of Renewals & Expansions, 15Five

Most teams get to two or three of these a quarter. Von handles all 10, and more.

Your revenue team is short-staffed. Von fixes that.

Von connects to your CRM, call recordings, emails, and data warehouse and spends days learning how your business actually works: your definitions, your territory logic, your historical patterns. From there, the analytical work that used to take your team days gets done in minutes.

Von doesn't query your systems and hand you a summary. It reasons across structured and unstructured data the way a tenured RevOps leader would, and then it does the work.

Every answer is fully auditable: which data sources it used, which queries it ran, which assumptions it made, down to the exact minute in a call transcript.

The prompts in this playbook work as-is inside Von. Try one and see what comes back.

[Book a demo at vonlabs.ai](https://vonlabs.ai)