Category

Commercial Excellence

End-to-End Commercial Excellence Playbook (Operating Model, KPIs, Rhythm)

A five-layer operating model, KPI tree, and meeting cadence that connects strategy to daily commercial execution.

- Executive
- Advanced
- Template Included
- Workshop Ready

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- 8 minute(s)

Overview

Build one commercial operating model that aligns Sales, Marketing, Customer Success, and Finance around the same KPIs, the same deal-stage definitions, and one weekly-monthly-quarterly rhythm.

How is a commercial operating model different from a sales process?

A sales process describes what a rep does inside one deal. The commercial operating model is broader — it covers how Sales, Marketing, Customer Success, and Finance jointly define, measure, and govern the entire revenue engine, including targets, org design, data definitions, and meeting cadence.

How long does it take to stand this up from scratch?

The baseline audit and workshop take two to three weeks. Most companies then pilot the model in one region or segment for a full quarter before rolling it out company-wide, so plan on roughly one full quarter from kickoff to company-wide adoption.

Who should own the KPI tree once it's built?

RevOps or Commercial Operations should own the tree's structure and definitions, but each individual metric needs a named accountable owner in the function closest to it — for example, VP Marketing owns MQL volume, VP Sales owns stage-conversion rates.

What's the single most common reason this model fails after a strong launch?

Leaders stop protecting the rhythm calendar once the business gets busy or a crisis hits. The KPI tree and RACI can be perfectly designed and still decay within two quarters if the recurring forecast calls and QBRs get skipped or shortened.

Do we need new software to implement this, or can we use our existing CRM and BI stack?

Almost always your existing CRM and BI stack are sufficient. The gap is rarely tooling — it's the absence of agreed-upon definitions and ownership. Fix the operating model first; only add or replace tools if a genuine data-capture gap remains after that.

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