

Revenue Cadence Template

Weekly pipeline, monthly forecast, quarterly business reviews. One rhythm.

Most revenue problems are cadence problems. The data exists. The meetings happen. But nobody owns the rhythm that connects them.

The Problem

Product ships features nobody asked for. Sales closes deals product cannot support. Marketing generates leads nobody follows up on. Everyone is busy. Revenue is flat.

The fix is not more tools, more dashboards, or more meetings. The fix is one cadence that everyone follows. One owner. One source of truth. Every week.

Weekly Pipeline Review (30 min)

Who: Sales lead, product lead, marketing lead, revenue owner

When: Same day, same time, every week. No exceptions.

Agenda:

1. Pipeline snapshot (5 min)

New leads in, deals advanced, deals stalled, deals lost. Numbers only. No narratives.

2. Stalled deals (10 min)

Pick the top 3 stalled deals. What is blocking each one? Assign one action per deal. Owner and deadline.

3. Handoff quality (5 min)

Any leads that fell through the cracks this week? Any deals where the customer expected something product did not deliver?

4. Next week focus (10 min)

What are the 3 things that will move pipeline forward this week? One from marketing, one from sales, one from product.

Rule: If you cannot answer with a number, it is not ready for this meeting.

Monthly Forecast Review (60 min)

Who: Leadership team, revenue owner, finance

When: First Monday of each month.

Agenda:

1. Actuals vs. forecast (15 min)

What did we predict last month? What happened? Where were we wrong, and why?

2. Pipeline coverage (15 min)

Do we have 3x coverage for next month? Next quarter? Where are the gaps?

3. Unit economics check (15 min)

CAC, LTV, payback period, win rate. Are they trending up or down? Any red flags?

4. Commitments (15 min)

Three commitments for the month. Specific, measurable, owned. Written down, not just discussed.

Quarterly Business Review (2 hours)

Who: Full leadership team, board if applicable

When: Last week of the quarter.

Agenda:

1. Quarter in review (30 min)

Revenue vs. target. Pipeline velocity. Win/loss analysis. Customer retention. The honest version, not the board-ready version.

2. What worked, what did not (30 min)

Three things that drove results. Three things that did not. No blame. Just facts.

3. Next quarter plan (30 min)

Revenue target. Pipeline needed. Three strategic bets. Resource allocation.

4. Structural changes (30 min)

Do we need to change the team? The process? The pricing? Decisions, not discussions.

Implementation Checklist

- Pick one person to own the revenue cadence. Not a committee. One person.
- Start with the weekly meeting. Get that right before adding monthly and quarterly.
- Use one dashboard. If it does not fit on one screen, simplify it.
- Cancel every other revenue meeting. This cadence replaces them all.
- Give it 4 weeks before you judge it. The first 2 weeks will feel awkward. Push through.

Need help building this cadence inside your company? Book a diagnostic call at pmguru.org/booking.