Revenue Operations Charter

The operating agreement for one revenue system — from first touch through expansion.

Company	*[Company name]*	**Effective date**	*[Date]*

1. Purpose

RevOps exists to make revenue predictable and efficient by aligning Marketing, Sales, and Customer Success on one data model, one process design, one technology architecture, and one scorecard. It owns the seams between teams — not the teams themselves.

2. Shared revenue goal (the only number that binds all three teams)

[Write one sentence. Example: Grow net revenue while holding payback under X months and NRR at or above Y%.] All functional targets must ladder to this goal.

3. Reporting line and authority

Executive sponsor: [CEO / CRO]

RevOps reports to: [CRO / CEO / COO] — not solely to Sales, Marketing, or CS.

Authority: RevOps is the referee on metric definitions, handoff SLAs, system-of-record rules, and GTM stack architecture. Disputes escalate to the sponsor, not to a departmental vote.

4. What RevOps owns · What RevOps does not own

Owns	Does not own
Single source of truth for revenue data and the metric dictionary (MQL, SQL, pipeline, bookings, NRR, forecast categories).	Campaign strategy, creative, or demand-gen execution.
End-to-end process design and SLAs: lead routing, stage criteria, Closed-Won → CS handoff, renewal/expansion workflow.	Carrying quota or closing deals. Managing individual reps or CSMs.
GTM technology architecture: CRM as system of record, integrations, what is added or retired.	Product roadmap, pricing strategy, or legal contracting (partners with those owners).
Exec revenue reporting, forecast process integrity, and capacity/territory inputs to planning.	Replacing Sales Ops, Marketing Ops, or CS Ops specialists — it governs how they connect.

5. First 90 days (maximum three workstreams)

- Workstream 1 — Definitions: freeze the metric dictionary; reconcile Marketing / Sales / Finance numbers.
- Workstream 2 — One leaky seam: document and enforce a single handoff SLA (default: MQL→SQL or Closed-Won→CS).
- Workstream 3 — One source of truth: weekly pipeline inspection in the CRM; one exec dashboard; freeze net-new tools unless they fix a named process gap.

6. How we will know it is working

- One pipeline number in exec meetings — Marketing, Sales, and Finance use the same definition.
- Named owner + SLA on the worst handoff; breaches visible weekly.
- Forecast accuracy and bias tracked; dashboard count goes down, not up.

7. Stop-doing list

[Name 2–3 current habits that this charter kills. Examples: competing departmental dashboards; MQL targets disconnected from revenue; shadow spreadsheets as forecast source; tool purchases without RevOps review.]

8. Signatures — we agree to the above

Role	Name / signature	Date
CEO / Executive sponsor		
CRO (or head of Sales)		
CMO (or head of Marketing)		
CCO / VP Customer Success		
CFO (metric & systems co-signer)		