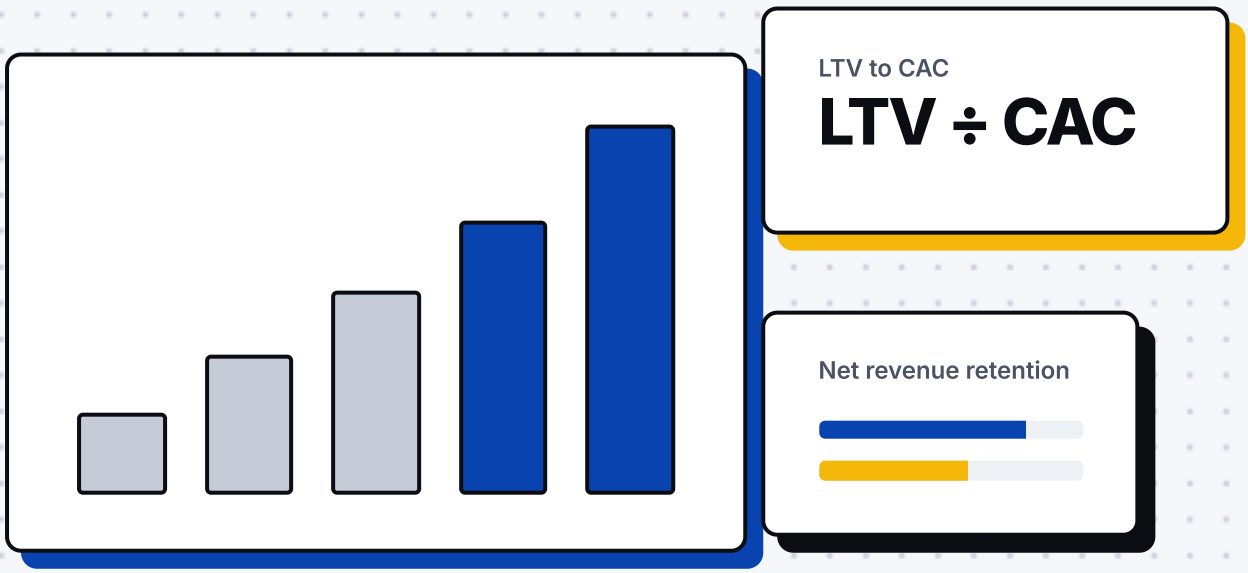
Perceptric

Free guide

The B2B SaaS Metrics Guide

The 20 revenue metrics marketing teams need, with formulas, worked examples, public benchmarks and a monthly report you can copy.



perceptric.com

2026 edition

Contents

01 Why marketing teams need to speak in revenue metrics

02 Acquisition metrics

03 Sales metrics

04 Retention and growth metrics

05 Efficiency metrics

06 The one-page metrics cheat sheet

07 How to build a monthly marketing-to-revenue report

01

CHAPTER ONE

Why marketing teams need to speak in revenue metrics

Finance and the board judge growth in ARR and in what it costs. Your report should use the same numbers.

What SaaS companies spend on marketing and selling

The four metric groups, from first visit to payback

Where each number lives and who owns it

Four things to do this week

Your finance team and board judge the business by recurring revenue and what it costs to grow it. When your marketing report uses the same terms, budget talks get shorter and calmer.

8%

Median marketing spend as a share of ARR at private B2B SaaS companies

Source: SaaS Capital, 2026

15%

Median selling spend as a share of ARR, up from 13% a year earlier

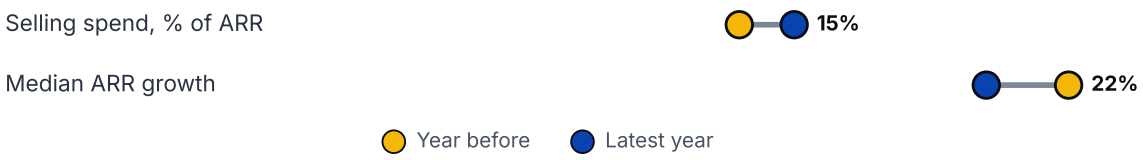
Source: SaaS Capital, 2026

22%

Median annual growth of private B2B SaaS companies in 2025, down from 25%

Source: SaaS Capital, 2026

Selling costs rose while growth slowed



Source: SaaS Capital, 2026 spending and growth rate benchmarks for private B2B SaaS companies

Sources: SaaS Capital, 2026 Spending Benchmarks for Private B2B SaaS Companies and 2026 Private B2B SaaS Company Growth Rate Benchmarks, both surveys of more than 1,000 companies.

Marketing is one of the larger lines in a SaaS budget, and finance reviews it every quarter. If your report stops at traffic and leads, finance has to guess what that money returned.

With growth slowing across SaaS, leaders now ask which programs create pipeline, which customers stay and how fast each dollar of spend comes back.

> **Revenue metrics give you a chain from the first website visit to renewal. Each link in that chain has a number, an owner and a formula that finance can check.**
>
> The idea behind this guide

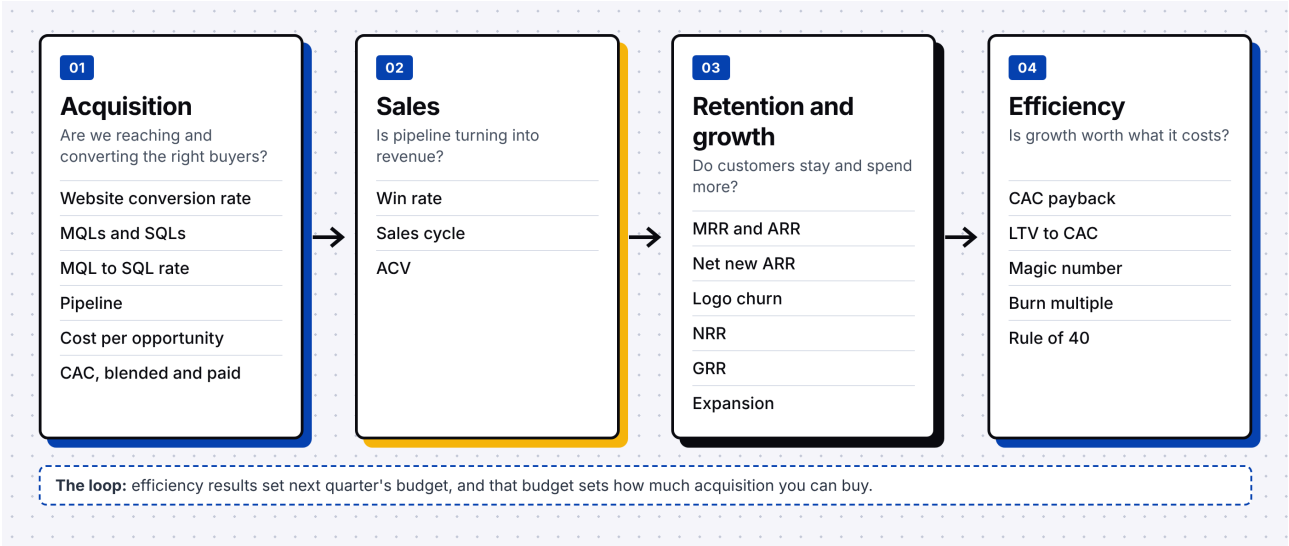
How this guide works

We group 20 metrics into four sets that follow the buyer from first visit to renewal. Each metric gets a plain meaning, a formula, a worked example and a public benchmark where a real one exists.

Benchmarks shift with contract size, company stage and sales motion, so compare yourself with companies like yours.

About the examples

Every worked example uses made-up round numbers so the math is easy to follow. Look for the gold EXAMPLE tag.



The four metric groups in this guide, in the order a buyer moves through them.

Where each group of metrics lives

Most of these numbers already exist somewhere in your company. The work is to pull them from the right system and agree on who owns each one.

Group	System of record	Usual owner
Acquisition	Web analytics, marketing automation and the CRM	Marketing ops or demand generation
Sales	The CRM, with opportunity stages and close dates	Sales ops or revenue ops
Retention and growth	Billing or subscription system	Finance or customer success
Efficiency	The finance model and income statement	Finance

What to do this week

- [ ] Mark which of the 20 metrics you can calculate today from your own systems.
- [ ] Write down the system of record for each one, such as your CRM, billing tool or web analytics.
- [ ] Book 30 minutes with your sales and finance leads to agree on how you define an MQL, an SQL and an opportunity.
- [ ] Ask finance for last quarter's sales and marketing spend and the ARR number they report to the board.

02

CHAPTER TWO

Acquisition metrics

The numbers marketing controls most directly, from the first session to the cost of a new customer.

01 Website conversion rate

02 MQLs and SQLs

03 MQL to SQL rate

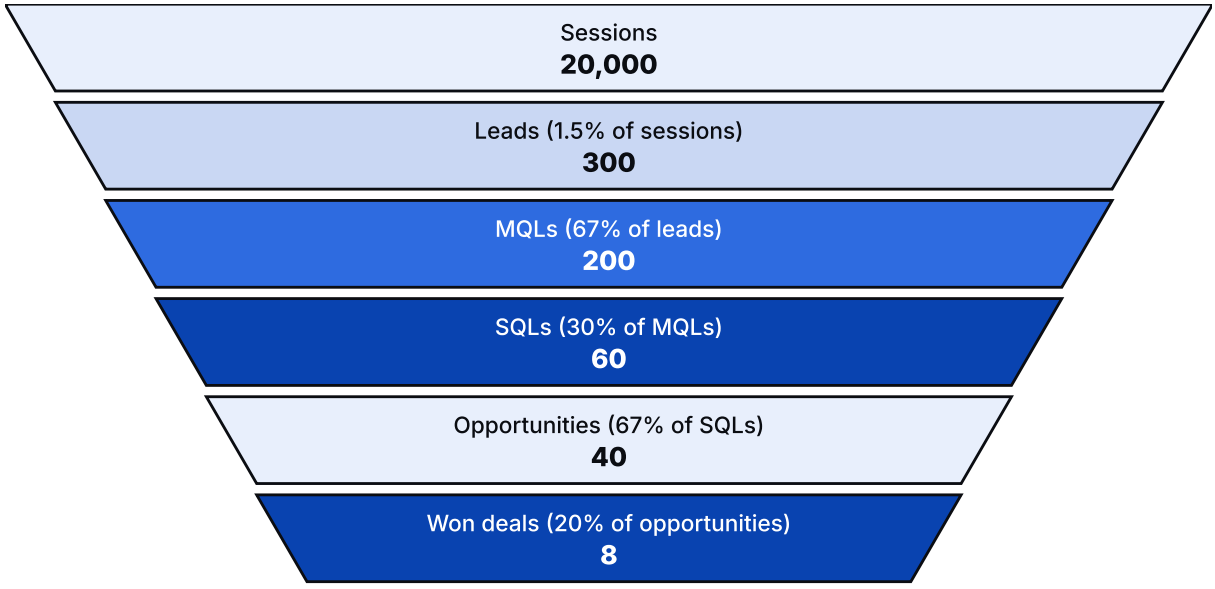
04 Pipeline

05 Cost per opportunity

06 CAC, blended and paid

Acquisition metrics show whether you reach the right buyers and turn their interest into sales conversations. They are also the numbers that marketing teams control most directly from month to month.

EXAMPLE: one month at a made-up company



Made-up round numbers used in the worked examples in chapters 2 and 3.

01 Website conversion rate

This is the share of website sessions that end in an action you care about, such as a demo request or a trial signup. Track buying actions apart from newsletter signups so one does not hide the other.

FORMULA	Conversion rate = conversions ÷ sessions × 100

Example: a site with 20,000 sessions and 300 demo requests in a month has a website conversion rate of 1.5%.

Median landing page conversion rate



Source: Unbounce, Conversion Benchmark Report, 2024

Benchmark: the median SaaS landing page converts at 3.8%, against 6.6% across all industries. That figure covers single landing pages, so compare it with your own landing pages and keep the sitewide rate as its own line.

Source: Unbounce, Conversion Benchmark Report, 2024

02 MQLs and SQLs

MQL

A marketing qualified lead (MQL) meets the fit and intent rules that marketing and sales agreed on.

SQL

A sales qualified lead (SQL) is an MQL that sales has reviewed and accepted for a sales conversation.

FORMULA

MQLs = new leads in the period that meet the agreed scoring rule

SQLs = MQLs in the period that sales accepted

Example: of 300 new leads in a month, 200 match the target company size and asked for a demo, so they count as MQLs. Sales reviews them and accepts 60 of the 200 as SQLs.

Benchmark: definitions differ too much between companies for a public benchmark to mean much. Compare each month with your own average from the trailing six months instead.

03 MQL to SQL rate

This rate shows whether sales wants the leads that marketing sends over each month. A falling rate usually points to loose scoring rules or traffic from people who will never buy.

FORMULA

MQL to SQL rate = SQLs ÷ MQLs from the same period × 100

Example: 60 SQLs from 200 MQLs gives an MQL to SQL rate of 30% for the month.

Benchmark: we found no public benchmark with a clear method, so track your own trend. Break it down by channel to see which sources send leads that sales accepts.

04 Pipeline

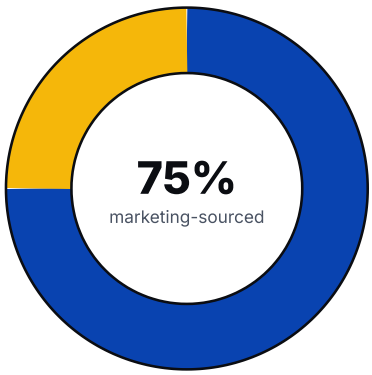
Pipeline is the total dollar value of the qualified opportunities that are still open. For marketing, the key numbers are pipeline created in the month and the share that came from marketing sources.

FORMULA	
	Pipeline created = sum of opportunity amounts created in the period
	Marketing-sourced share = marketing-sourced pipeline ÷ pipeline created × 100

Example: 40 new opportunities at an average of $25,000 make $1,000,000 of pipeline. If $750,000 started with a marketing lead, marketing sourced 75% of it.

> **Benchmark**
>
> Pipeline depends on your targets, so set the goal from the bookings plan. Work backward from new ARR needed, win rate and average deal size.

EXAMPLE: pipeline created by source



Marketing-sourced	75%
Other sources	25%

05 Cost per opportunity

Cost per opportunity tells you what marketing spends to create one qualified sales opportunity. It is a better guide than cost per lead because it ignores leads that sales never works.

FORMULA	
	Cost per opportunity = marketing program spend ÷ marketing-sourced opportunities

Example: $100,000 of program spend that creates 40 opportunities gives a cost per opportunity of $2,500.

Benchmark: this number swings with deal size and channel mix, so compare channels inside your own business. Rank your channels by cost per opportunity at the end of each quarter.

06 CAC, blended and paid

Customer acquisition cost (CAC) is the full sales and marketing cost to win one new customer. Blended CAC uses all spend and all new customers, while paid CAC counts only paid channel spend and the customers those channels brought in.

FORMULA	
	Blended CAC = total sales and marketing cost ÷ new customers
	Paid CAC = paid media and paid program cost ÷ new customers from paid channels
	CAC ratio = sales and marketing cost ÷ new customer ARR

Blended CAC: $25,000

EXAMPLE

A quarter with $600,000 of sales and marketing cost and 24 new customers has a blended CAC of $25,000.

Paid CAC: $40,000

EXAMPLE

In the same quarter, $240,000 of paid spend won 6 customers, so paid CAC is $40,000.

The gap between the two numbers shows how much organic search, referrals and word of mouth lower your blended cost.

> **Report blended and paid CAC side by side, so a strong organic quarter does not hide rising paid costs.**
>
> Our rule for every CAC report

$2.00

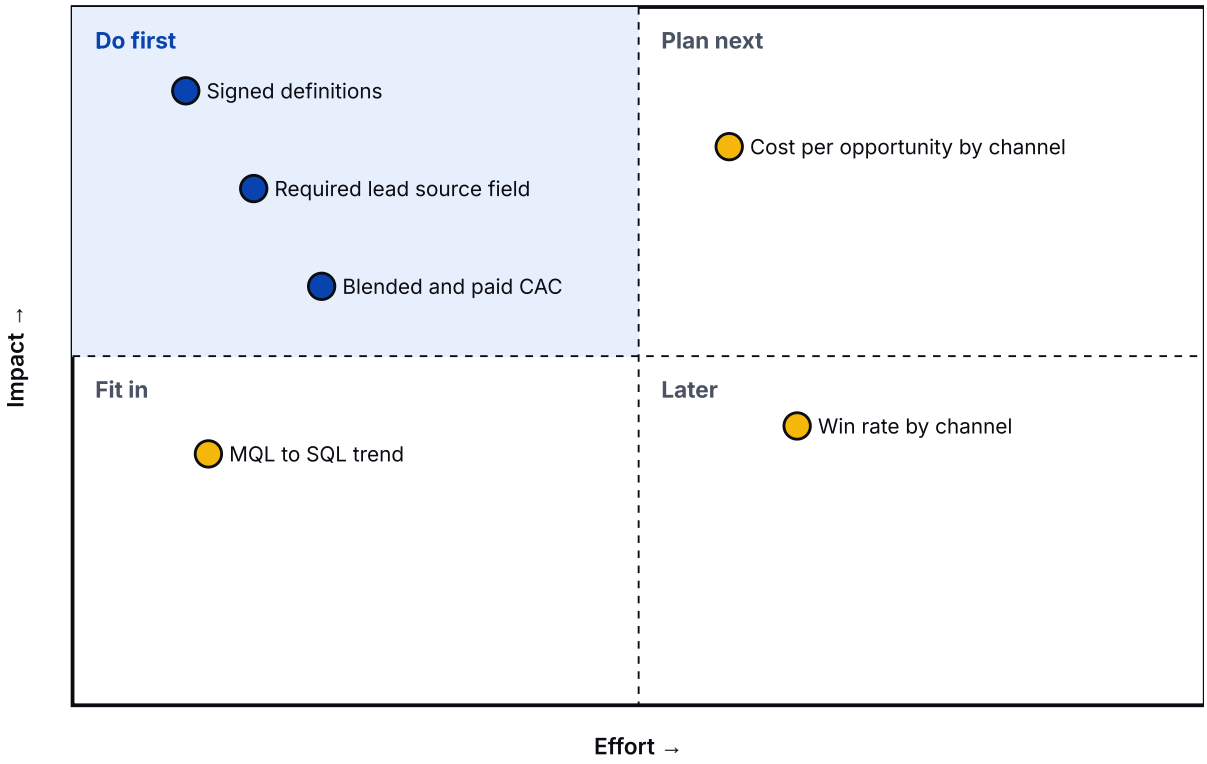
of sales and marketing spend to win $1.00 of new customer ARR at the median private B2B SaaS company in 2024.

That new CAC ratio rose 14% compared with the year before. Use it as the benchmark for your own CAC ratio.

Source: Benchmarkit, 2025 B2B SaaS Performance Metrics Benchmarks

What to do next

Where to start: effort against impact for the acquisition fixes



Perceptric's own prioritization, based on the work each fix usually takes.

- [ ] Put your MQL, SQL and opportunity definitions on one page and get your sales lead to sign it.
- [ ] Add a lead source field to every opportunity in your CRM and make it required.
- [ ] Calculate cost per opportunity for each channel for last quarter and rank them.
- [ ] Report blended CAC and paid CAC side by side from this month on.

03

CHAPTER THREE

Sales metrics

How much of the pipeline marketing helped create turns into signed revenue, and how fast.

07 Win rate

08 Sales cycle

09 ACV (annual contract value)

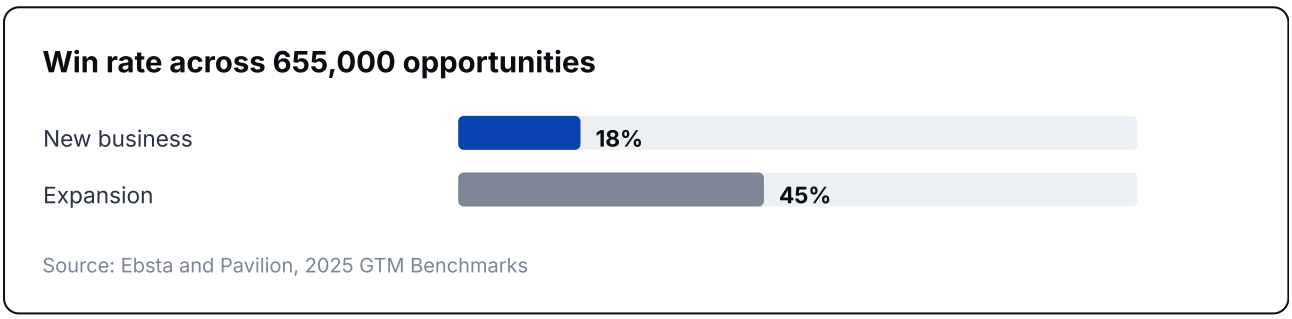
Sales metrics show how much of the pipeline marketing helped create turns into revenue. Marketing affects them through lead quality, content for buyers and deal size.

07 Win rate

Win rate is the share of your closed opportunities that end as signed deals. Count only deals that reached your defined opportunity stage, and leave open deals out of the math.

FORMULA	Win rate = deals won ÷ (deals won + deals lost) × 100

Example: 40 opportunities closed this quarter and 8 of them were won, so the win rate is 20%.



Benchmark: across 655,000 opportunities, the new business win rate was 18% and the expansion win rate was 45%. Split your own win rate by lead source to see which channels bring buyers who sign.

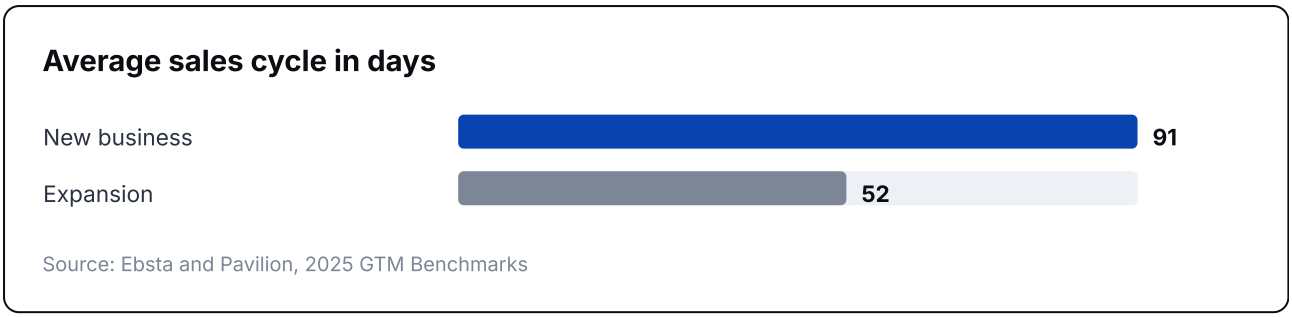
Source: Ebsta and Pavilion, 2025 GTM Benchmarks

08 Sales cycle

Sales cycle is the average number of days from when an opportunity is created to when it closes as won. A longer cycle means pipeline you build today turns into revenue later.

FORMULA	Sales cycle = total days from created to closed won, for all won deals ÷ number of won deals

Example: 8 won deals that took 720 days in total give an average sales cycle of 90 days.



Benchmark: new business deals took 91 days on average, while expansion deals took 52 days. Use your own cycle to decide how far ahead marketing must build pipeline.

Source: Ebsta and Pavilion, 2025 GTM Benchmarks

09 ACV (annual contract value)

ACV is the average yearly recurring value of a new contract, without one-time fees. It sets how much you can afford to spend to win a customer and which channels pay off.

FORMULA	ACV = first-year recurring contract value of new deals ÷ number of new deals

Example: 8 new deals worth $240,000 a year in total give an ACV of $30,000.

Benchmark

ACV reflects your market and pricing, so there is no right number. Many public benchmarks for CAC and retention are split by ACV band, so find yours before you compare.

What to do next

- [ ] Pull win rate and sales cycle by lead source for the last two quarters.
- [ ] Ask sales which content they send in late-stage deals and which questions slow deals down.
- [ ] Write down your ACV band so you pick the right benchmarks in the next chapters.

04

CHAPTER FOUR

Retention and growth metrics

Whether the customers you win stay with you and spend more each year.

10 MRR and ARR

11 Net new ARR

12 Logo churn

13 NRR (net revenue retention)

14 GRR (gross revenue retention)

15 Expansion

These metrics show whether the customers you win stay with you and spend more over time. Marketing affects them through the buyers it attracts and through customer marketing after the sale.

22%
median ARR growth, private B2B SaaS, 2025

102%
median NRR, B2B SaaS, 2025

84%
median GRR, latest annual data

40%
of net new ARR from expansion, median

Sources: SaaS Capital, 2026; Aleph and Benchmarkit, 2026; Benchmarkit, 2026. Links on each metric below.

10 MRR and ARR

Monthly recurring revenue (MRR) is the recurring revenue you bill in a month. Annual recurring revenue (ARR) is the same number for a year, and both leave out one-time fees such as setup or services.

FORMULA	
	MRR = sum of monthly recurring fees from active customers
	ARR = MRR × 12

Example: 250 customers paying an average of $2,000 a month give an MRR of $500,000 and an ARR of $6,000,000.

Benchmark: the median private B2B SaaS company grew ARR by 22% in 2025, down from 25% in 2024.

Source: SaaS Capital, 2026 Private B2B SaaS Company Growth Rate Benchmarks

11 Net new ARR

Net new ARR is how much ARR grew in a period after all gains and losses. Splitting it into its four parts shows whether growth came from new logos or existing customers.

FORMULA	
	Net new ARR = new customer ARR + expansion ARR − contraction ARR − churned ARR

EXAMPLE: the four parts of one quarter's net new ARR, in $ thousands



Made-up round numbers: $600,000 + $300,000 minus $100,000 minus $200,000 = $600,000.

Example: a quarter with $600,000 new, $300,000 expansion, $100,000 contraction and $200,000 churn adds $600,000 of net new ARR.

Benchmark: net new ARR depends on company size, so track it against plan. Show the four parts as a bar chart every month so changes stand out.

12 Logo churn

Logo churn is the share of customers who leave in a period, whatever their size. It shows whether marketing attracts buyers who are a good fit for the product.

FORMULA	Logo churn = customers lost in the period ÷ customers at the start of the period × 100

Example: a company that starts the year with 400 customers and loses 60 of them has an annual logo churn of 15%.

Customers kept over 12 months, top quartile



Source: ChartMogul, SaaS Retention Report, 2023

Benchmark: top-quartile companies with $3M to $8M ARR kept 80.4% of customers over 12 months. Among companies with $15M to $30M ARR, the top quartile kept 84.2% of customers.

Source: ChartMogul, SaaS Retention Report, 2023

13 NRR (net revenue retention)

NRR is the share of ARR you keep from a starting group of customers after 12 months, counting expansion, contraction and churn. An NRR above 100% means your existing customers grow revenue even before you add new ones.

FORMULA	NRR = (starting ARR + expansion − contraction − churn) ÷ starting ARR × 100

Example: a group of customers starts at $5,000,000 ARR, adds $700,000 in expansion and loses $500,000 to contraction and churn. The group ends the year at $5,200,000, which is an NRR of 104%.

Benchmark: the median B2B SaaS company had an NRR of 102% in 2025, and the top quartile reached 110%.

Source: Aleph and Benchmarkit, 2026 SaaS and AI Performance Benchmarks

14 GRR (gross revenue retention)

GRR is the share of starting ARR you keep after contraction and churn, with expansion left out. It can never pass 100%, so it shows how well you hold revenue before upsells.

FORMULA	GRR = (starting ARR − contraction − churn) ÷ starting ARR × 100

Example: the same group starts at $5,000,000 and loses $150,000 to contraction and $350,000 to churn. GRR is the remaining $4,500,000 divided by the starting $5,000,000, which comes to 90%.

Revenue retention benchmarks



Sources: Aleph and Benchmarkit, 2026 SaaS and AI Performance Benchmarks (NRR); Benchmarkit, 2026 SaaS and AI-Native Metrics (GRR)

Benchmark: median GRR fell from 88% to 84% in the latest annual data from private SaaS companies.

Source: Benchmarkit, 2026 SaaS and AI-Native Metrics

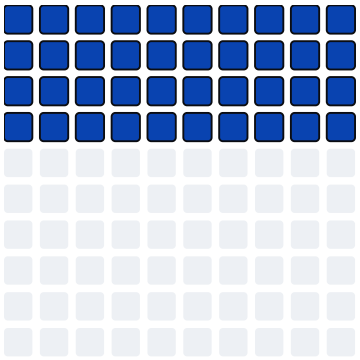
15 Expansion

Expansion is new ARR from existing customers through upsells, cross-sells, more seats or more usage. Customer marketing, launch campaigns and case studies give existing customers reasons to buy more.

FORMULA	
	Expansion rate = expansion ARR ÷ starting ARR × 100
	Expansion share = expansion ARR ÷ (new customer ARR + expansion ARR) × 100

Example: $700,000 of expansion on $5,000,000 of starting ARR is an expansion rate of 14%. With $1,400,000 of new customer ARR, expansion makes up 33% of new ARR.

Expansion share of net new ARR



40%

of net new ARR came from expansion at the median company in the latest annual data.

Source: Benchmarkit, 2026 SaaS and AI-Native Metrics

What to do next

This month
Ask finance for NRR and GRR for the last four quarters and add them to your report.

→

Next month
Compare logo churn for customers from each lead source over their first year.

→

This quarter
Plan one customer marketing program this quarter aimed at a known expansion product.

05

CHAPTER FIVE

Efficiency metrics

Whether the growth you buy is worth what it costs. These numbers set next year's budget.

16 CAC payback

17 LTV to CAC

18 Magic number

19 Burn multiple

20 Rule of 40

Efficiency metrics tell your leaders whether the growth you buy is worth what it costs. They set next year's budget, so marketing leaders who know them have a stronger voice in planning.

16 CAC payback

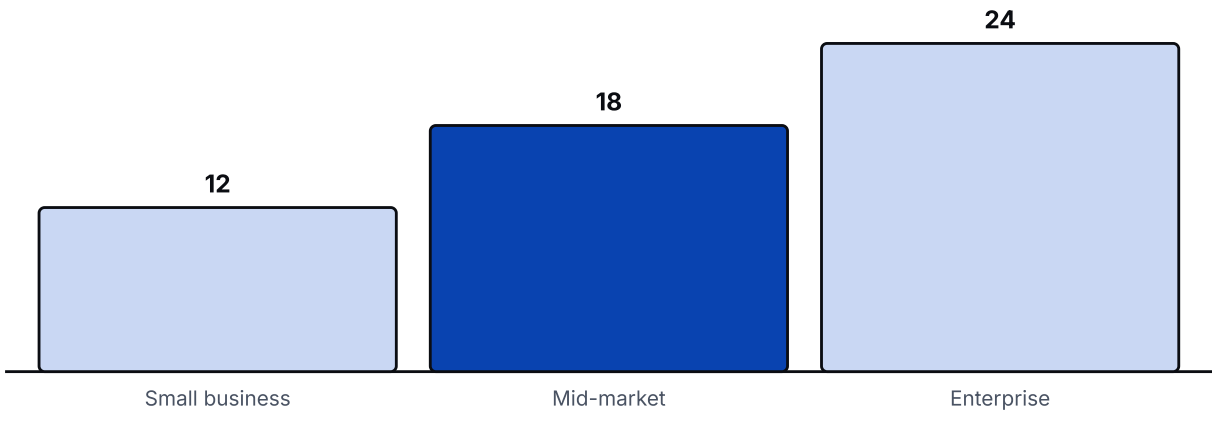
CAC payback is the number of months of gross profit a new customer needs to earn back what you spent to win them. A shorter payback means the cash comes back sooner and you can reinvest it.

FORMULA **CAC payback (months) = CAC ÷ (new customer MRR × gross margin %)**

$24,000 CAC for one new customer → **$2,000** paid each month → **$1,600** gross profit a month at an 80% margin → **15 months** to earn back the CAC

Example: a customer with a CAC of $24,000 pays $2,000 a month at an 80% gross margin. That is $1,600 of gross profit a month, so payback takes 15 months.

Target CAC payback in months, by customer segment



Source: Bessemer Venture Partners, Scaling to $100 Million, 2021. Targets are upper limits.

Benchmark: target payback is under 12 months for small business customers and under 18 months for mid-market. For enterprise customers with larger contracts, the target is under 24 months.

Source: Bessemer Venture Partners, Scaling to $100 Million, 2021

17 LTV to CAC

Lifetime value (LTV) is the gross profit you expect from a customer over the whole relationship. Comparing it with CAC shows how much value each acquisition dollar creates.

FORMULA	
	LTV = monthly revenue per account × gross margin % ÷ monthly revenue churn rate
	LTV to CAC = LTV ÷ CAC

$2,000 monthly revenue per account → **× 80%** gross margin → **÷ 1%** monthly revenue churn → **$160,000** LTV → **4 to 1** LTV to CAC, with a $40,000 CAC

Example: an account paying $2,000 a month at an 80% margin, with 1% monthly revenue churn, has an LTV of $160,000. With a CAC of $40,000, LTV to CAC is 4 to 1.

Benchmark: a long-used guideline for a healthy SaaS business is an LTV to CAC ratio above 3. Small changes in churn move LTV a lot, so read this ratio next to CAC payback.

Source: David Skok, SaaS Metrics 2.0, For Entrepreneurs, 2014

18 Magic number

The magic number measures how much new recurring revenue each dollar of sales and marketing creates. It uses one quarter's spend against the revenue gain in the next quarter.

FORMULA	
	Magic number = (this quarter's revenue − last quarter's revenue) × 4 ÷ last quarter's sales and marketing spend

Example: quarterly revenue grows from $2,500,000 to $2,700,000 after $1,000,000 of spend. The $200,000 gain times 4 is $800,000, so the magic number is 0.8.

Above 0.7	Below 0.7
A magic number above 0.7 is a signal to invest more in sales and marketing.	Below 0.7 is a signal to review your go-to-market model before you spend more.

Source: Scale Venture Partners, Magic Number Calculator for SaaS, 2015

19 Burn multiple

Burn multiple shows how much cash a company burns to add each dollar of net new ARR. It applies to companies that are losing money, and lower is better.

FORMULA	Burn multiple = net burn ÷ net new ARR

Example: a company that burns $3,000,000 in a year while adding $2,000,000 of net new ARR has a burn multiple of 1.5.

Benchmark

A burn multiple of 2 is reasonable for an early-stage startup, and 5 is very poor. A seed company might sit at 3 and drop to 2 after its Series A.

Source: David Sacks, The Burn Multiple, 2020

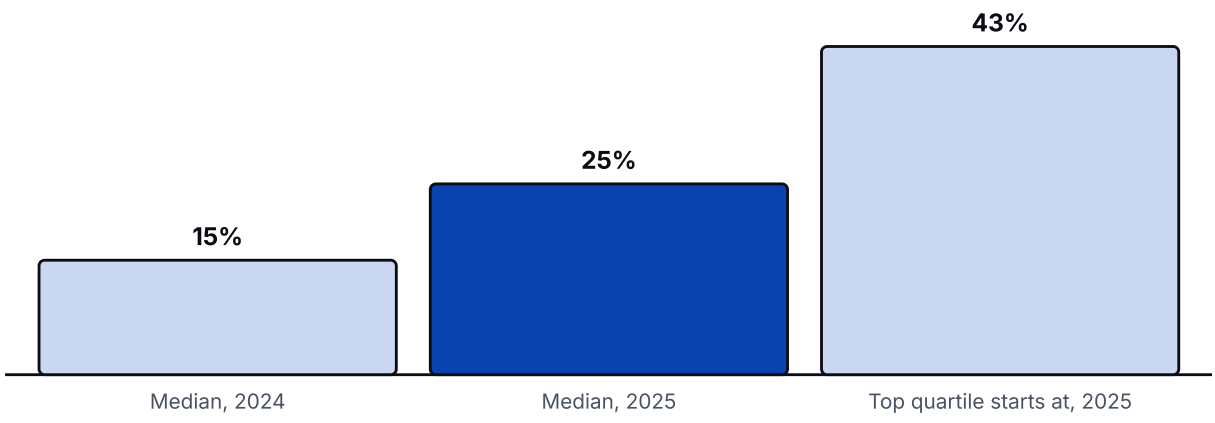
20 Rule of 40

The Rule of 40 adds your revenue growth rate to your profit margin. A total of 40% or more means the company balances growth and profit well.

FORMULA	Rule of 40 score = revenue growth rate % + profit margin % (EBITDA or free cash flow)

Example: a company growing 30% a year with a 5% EBITDA margin scores 35, which is five points short of the target.

Rule of 40 scores, B2B SaaS



Source: Aleph and Benchmarkit, 2026 SaaS and AI Performance Benchmarks

Benchmark: the median B2B SaaS company scored 25% in 2025, up from 15% a year earlier, while the top quartile started at 43%.

Source: Aleph and Benchmarkit, 2026 SaaS and AI Performance Benchmarks

Read the efficiency metrics together

An efficiency metric rarely explains itself, because it sums up results from every earlier stage. When one moves the wrong way, start with the metrics that feed it.

What you see	Where to look first
CAC payback getting longer	Win rate and ACV by channel, then paid CAC against blended CAC
LTV to CAC falling	Logo churn and GRR for customers won in the last year, by lead source
Magic number below 0.7	Pipeline created and sales cycle, since spend may not have turned into revenue yet
Burn multiple rising	The four parts of net new ARR, to see if churn is eating new sales
Rule of 40 score dropping	Growth rate first, then sales and marketing spend as a share of revenue

01

Get the inputs

Ask finance for gross margin and net burn so you can calculate payback and burn multiple yourself.

02

Compare channels

Work out CAC payback for your two biggest channels and share the gap with your CFO.

03

Review quarterly

Add magic number and Rule of 40 to your quarterly review, even if finance owns them.

06

CHAPTER SIX

The one-page metrics cheat sheet

All 20 formulas and benchmarks on one page, with how often to report each one.

Six acquisition metrics

Three sales metrics

Six retention and growth metrics

Five efficiency metrics

The one-page metrics cheat sheet

Metric	Formula	Public benchmark	Report
ACQUISITION			
Website conversion rate	Conversions ÷ sessions	3.8% median, SaaS landing pages	**Monthly**
MQLs and SQLs	Leads meeting the scoring rule; MQLs sales accepted	Your own trend	**Monthly**
MQL to SQL rate	SQLs ÷ MQLs	Your own trend	**Monthly**
Pipeline	Sum of new opportunity amounts	Set from the bookings plan	**Monthly**
Cost per opportunity	Program spend ÷ marketing-sourced opportunities	Compare channels	**Monthly**
CAC, blended and paid	S&M cost ÷ new customers	$2.00 of S&M per $1.00 new ARR, median	Quarterly
SALES			
Win rate	Won ÷ (won + lost)	18% new business, 45% expansion	**Monthly**
Sales cycle	Days created to won ÷ won deals	91 days new business, 52 expansion	Quarterly
ACV	First-year recurring value ÷ new deals	Set by your market	Quarterly
RETENTION AND GROWTH			
MRR and ARR	Monthly recurring fees; MRR × 12	22% median ARR growth, 2025	**Monthly**
Net new ARR	New + expansion − contraction − churn	Track against plan	**Monthly**
Logo churn	Customers lost ÷ customers at start	Top quartile keeps 80% to 84% a year	Quarterly
NRR	(Start + expansion − contraction − churn) ÷ start	102% median, 110% top quartile	Quarterly
GRR	(Start − contraction − churn) ÷ start	84% median	Quarterly
Expansion	Expansion ARR ÷ starting ARR	40% of net new ARR, median	Quarterly
EFFICIENCY			
CAC payback	CAC ÷ (new MRR × gross margin)	Under 12, 18 or 24 months by segment	Quarterly
LTV to CAC	(ARPA × margin ÷ churn) ÷ CAC	Above 3	Quarterly
Magic number	Quarterly revenue gain × 4 ÷ prior S&M	Above 0.7 to invest more	Quarterly
Burn multiple	Net burn ÷ net new ARR	2 reasonable early stage	Quarterly
Rule of 40	Growth % + profit margin %	25% median, 43% top quartile	Quarterly

Benchmark sources and years are listed on each metric's page in chapters 2 to 5.

07

CHAPTER SEVEN

How to build a monthly marketing-to-revenue report

A monthly report turns these metrics into decisions. Keep it to two pages that sales and finance can read in five minutes.

Six steps to build the report

What to report monthly and quarterly

Summary and channel table templates

A checklist and a five-day calendar

Build it in six steps

01

Name your sources and owners

Web analytics, marketing automation, the CRM and billing each own some metrics, and each metric gets one named owner.

02

Lock your definitions

Write each formula and date rule in a shared doc, such as whether a deal counts in the month it was created or closed.

03

Order it like the buyer journey

Start with acquisition and end with efficiency, so readers follow money from first visit to payback.

04

Show four columns for every metric

List this month, last month, the trailing three-month average and the target.

05

Add a channel table

Show sessions, MQLs, SQLs, pipeline and won ARR for each channel, with AI assistant referrals on their own row.

06

Close with one change and one decision

Write the biggest change in a sentence, then the decision you want from leadership.

The last column of the cheat sheet shows which metrics to report monthly and which quarterly. Quarterly metrics need longer windows to settle, so one strong or weak month does not swing them. Show them in every monthly report, but refresh the numbers only once a quarter.

A five-day report calendar

DAY 1, MARKETING OPS

Export last month's data from web analytics, marketing automation, the CRM and billing.

DAY 2, MARKETING OPS

Fill in the summary and channel tables, and refresh quarterly metrics if a quarter just closed.

DAY 3, METRIC OWNERS

Each metric owner checks their numbers against the source system.

DAY 4, MARKETING LEAD

Write the main change and the decision you need, then share the draft.

DAY 5, MARKETING LEAD

Review the report in a 30-minute meeting with sales and finance.

Report summary template

EXAMPLE The rows below use made-up numbers to show how the layout works. Replace them with your own data and keep the columns as they are.

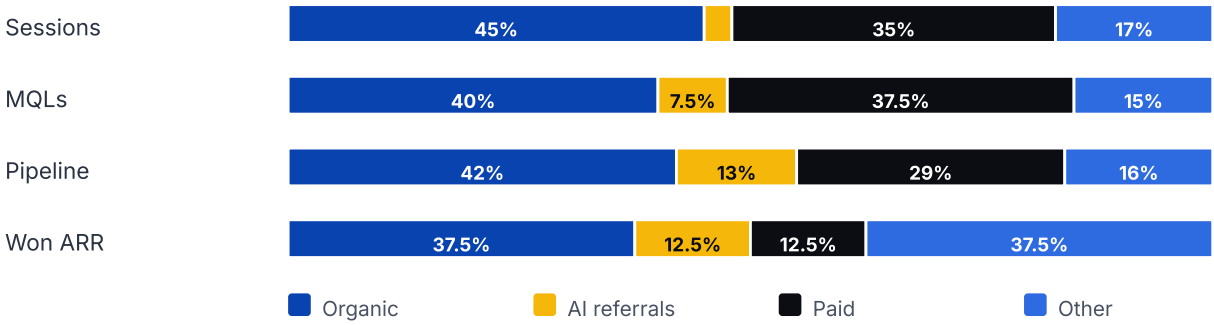
Metric	This month	Last month	3-month avg	Target	Owner
Website conversion rate	1.5%	1.3%	1.4%	1.6%	Web lead
MQLs	200	180	185	210	Demand gen
MQL to SQL rate	30%	27%	28%	30%	Marketing ops
Pipeline created	$1,000,000	$850,000	$900,000	$1,100,000	Demand gen
Cost per opportunity	$2,500	$2,800	$2,700	$2,500	Marketing lead
Win rate (trailing quarter)	20%	19%	19%	22%	Sales ops
Net new ARR	$200,000	$180,000	$190,000	$220,000	Finance

Channel table template

EXAMPLE This table uses the same made-up company as the summary above. Won ARR comes from deals that closed this month, so it lags behind pipeline.

Channel	Sessions	MQLs	SQLs	Pipeline	Won ARR
Organic search	9,000	80	26	**$420,000**	**$90,000**
AI assistant referrals	600	15	7	$130,000	$30,000
Paid search	4,000	45	11	$180,000	$30,000
LinkedIn ads	3,000	30	6	$110,000	$0
Events and webinars	400	20	6	$110,000	$30,000
Direct and referral	3,000	10	4	$50,000	$60,000
Total	**20,000**	**200**	**60**	**$1,000,000**	**$240,000**

EXAMPLE: each channel's share of the funnel, from the channel table



Made-up numbers from the channel table. Paid is paid search plus LinkedIn ads. Other is events, webinars, direct and referral.

In this example, AI assistant referrals bring 3% of sessions but 13% of pipeline. A channel table makes gaps like that visible, so give AI referrals their own row from the start.

Check before you send it

- [ ] Every number matches the system of record it comes from, checked by its owner.
- [ ] Pipeline and won ARR in the channel table add up to the totals in the summary.
- [ ] Any change in a definition since last month is noted at the top of the report.
- [ ] Each quarterly metric shows the quarter it covers next to its value.
- [ ] The report ends with one change, one decision and the person who owns it.

This month's decision

Write the one decision you want from leadership this month, with the metric that supports it and the owner.

Decision

Metric that supports it

Owner and date

ABOUT PERCEPTRIC

Turn search into pipeline you can report on

Perceptric is an SEO, GEO and content agency for B2B and SaaS companies. We build content that brings sales-qualified buyers from Google and AI assistants, and we report it in pipeline and revenue.

We also built Arrowsterr, our AI search tracking platform, so you can see how ChatGPT, Perplexity and Google's AI answers describe your brand.

Book a call and we will review your funnel metrics and show where search and AI answers can add pipeline.

Book a call

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