

Trusted
Data



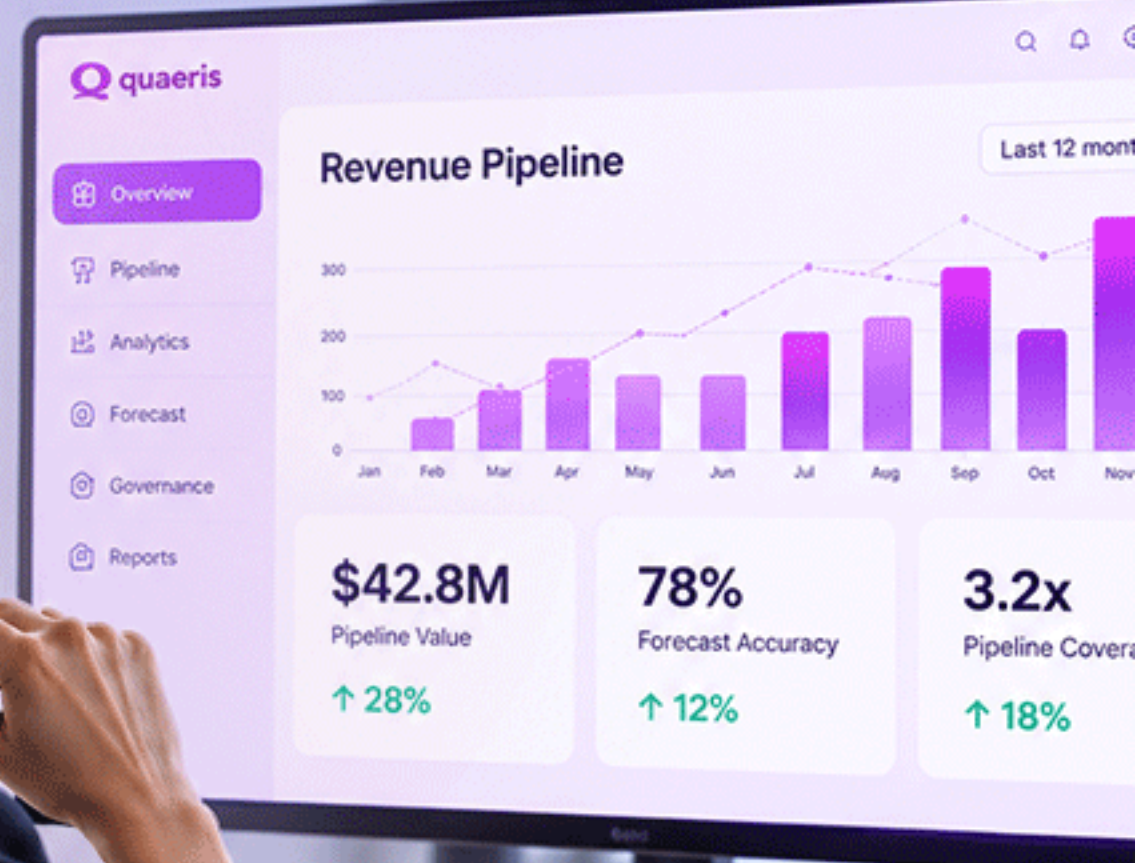
Smarter
Pipeline



Stronger
Revenue

QUAERISAI PLAYBOOK · REVENUE OPERATIONS

The Revenue Trust Playbook: Governing Pipeline Analytics for RevOps Teams



For:

RevOps Leaders,
Sales & Finance Ops



Read time:

10 minutes



Framework:

Connect · Certify ·
Consolidate · Convert



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WHY REVENUE TEAMS STOP TRUSTING THE PIPELINE

Forecast confidence can't start until the numbers agree.

CRM, warehouse, and planning tools each hold a version of the pipeline, and each version is built for a different audience. Sales sees open deals. Finance sees booked revenue. Planning sees a forecast built weeks ago. By the time the numbers meet in a QBR, nobody agrees on which one is current.

Most forecast misses don't come from bad sales execution. They come from a pipeline number that was already stale, or already inconsistent with what finance was tracking, before anyone presented it.



A note on scope:

This playbook is not about replacing your CRM or planning tool. It's about making sure the pipeline, ARR, and win-rate numbers that come out of them agree with each other, every cycle, not just on the weeks someone reconciles them by hand.





THE 4C FRAMEWORK, AT A GLANCE

Connect. Certify. Consolidate. Convert.

Four phases, repeated every forecast cycle. Unlike a one-time integration project, this framework runs continuously, since pipeline changes every week and the same trust gap opens up again each cycle if nothing holds it closed.



These phases aren't a one-time rollout sequence like a project plan. Connect happens once per system. Certify happens once per metric, then again only when a definition changes. Consolidate and Convert repeat every forecast cycle, weekly, monthly, or quarterly, depending on your rhythm.

1

Connect

ONGOING

Goal: Get read-only visibility into the CRM, the warehouse, and the planning tool, without a migration project sitting between you and the first reconciled number.answer.



WHAT USUALLY HAPPENS INSTEAD

Pipeline data lives in Salesforce or HubSpot, revenue data lives in the warehouse, and the forecast lives in a planning tool like Clari or Anaplan. Getting all three connected to one analytics layer becomes its own IT project, so teams fall back on manually exported spreadsheets to bridge the gap in the meantime.

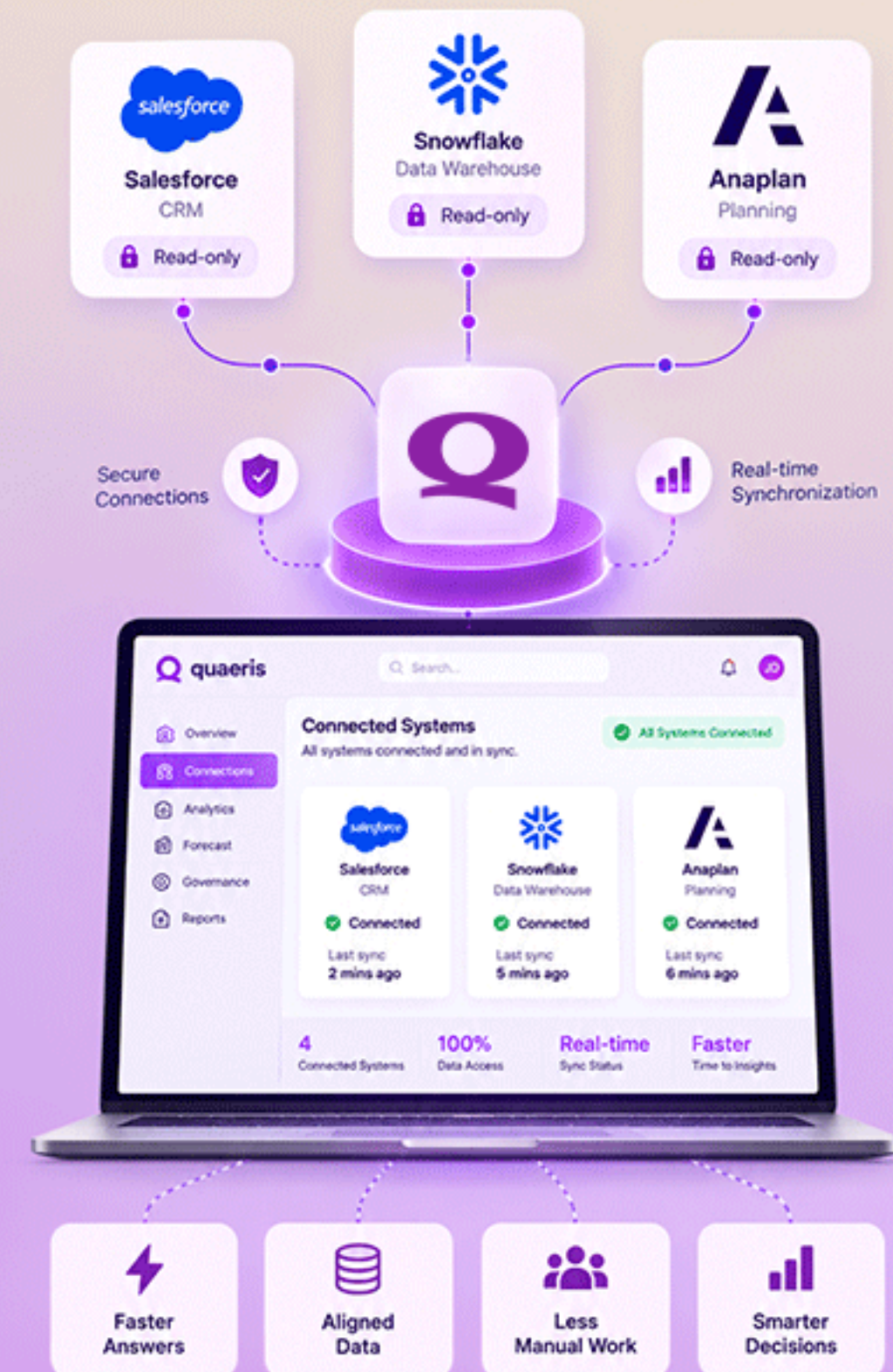


WHERE QUAERISAI FITS

Quaeris connects to CRM, warehouse, and planning systems in place, read-only. There is no data warehouse to build first and nothing to migrate before the first cross-system question can be asked.

Phase checklist

- ☒ Identify the CRM, warehouse, and planning tool currently in use
- ☒ Confirm read-only access can be granted without a lengthy change-control process
- ☒ Connect the analytics layer directly to all three, in parallel





2 Certify

PER METRIC

Goal: Agree on one certified definition for pipeline, ARR, and win rate, so sales, marketing, and finance are debating the forecast, not the definition behind it.



WHAT USUALLY HAPPENS INSTEAD

Sales counts a deal as pipeline the moment it's created. Finance only counts it once a stage 3 qualification is met. Marketing attributes it to a different campaign than the one sales is crediting. Every team is technically right by their own definition, and the QBR turns into a debate about whose number to use.



WHERE QUAERISAI FITS

Certified, versioned metric definitions apply consistently regardless of which system or team is asking. Once "pipeline" is certified, every downstream report, dashboard, and agent answer uses that same definition automatically.

Phase checklist

- ☒ Pull the core metrics sales, marketing, and finance each report on
- ☒ Certify one definition per metric, signed off by all three teams
- ☒ Document who owns changes to each certified definition going forward

3

Consolidate

PER CYCLE

Goal: Bring CRM, warehouse, and planning data into one pipeline view each cycle, so the numbers reconcile automatically instead of by hand.



WHAT USUALLY HAPPENS INSTEAD

Someone on the RevOps team exports all three sources into a spreadsheet every week to build the "real" pipeline view. It's fragile, it takes hours, and it has to be redone from scratch every single cycle because nothing about the process is automated.



WHERE QUAERISAI FITS

A certified mapping between CRM, warehouse, and planning data produces one consolidated pipeline view automatically, every cycle, without a manual export step standing between the data and the number leadership sees.

Phase checklist

- ☒ Map CRM stages against warehouse and planning categories
- ☒ Validate the consolidated view against last cycle's known numbers
- ☒ Retire, or stop manually maintaining, the spreadsheet this replaces





4 Convert

PER REVIEW

Goal: The forecast review should draw from the same certified pipeline everyone has been checking all cycle, not a reconciliation exercise assembled the night before.



WHAT USUALLY HAPPENS INSTEAD

The RevOps team spends the day before the forecast call reconciling CRM, warehouse, and planning numbers by hand, hoping nothing changes between the draft and the meeting. If a VP asks where a number came from, the honest answer is often "let me check and get back to you."



WHERE QUAERISAI FITS

Forecast reviews pull directly from certified, consolidated pipeline data, with full lineage attached, so any number in the review can be traced back to its source and defended live, not researched afterward.

Phase checklist

- ✓ Confirm every number in the forecast traces to a certified metric
- ✓ Anticipate likely questions and confirm they can be answered live
- ✓ Compare this cycle to the last using the same governed view, not a fresh export

WHAT HAPPENS IF YOU SKIP A PHASE

Skipping a phase doesn't save time. It moves the cost to the forecast call.

Every phase that gets skipped or rushed doesn't disappear, it resurfaces later, usually at a worse moment than if it had been done properly the first time.

Where the cost shows up later



SKIP CONNECT

Every downstream number is built on a manually exported snapshot, which is already stale by the time anyone uses it in a review.



SKIP CERTIFY

The forecast call turns into a debate about whose pipeline definition is correct, instead of a discussion about the business.



SKIP CONSOLIDATE

The RevOps team keeps rebuilding the same reconciliation spreadsheet by hand, every single cycle, indefinitely.



SKIP CONVERT

All the certification and consolidation work is invisible to the one audience, leadership, that actually needed to see it.





THE CYCLE, IN ONE TABLE

A single reference for the full sequence.

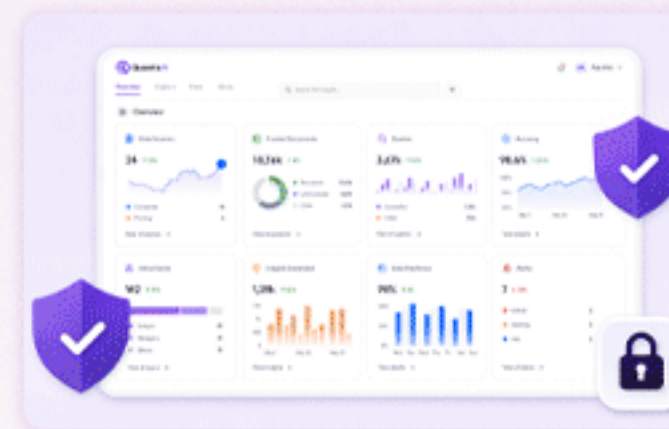
Phase	Day range	You'll know it's done when...
 Connect	Once per system	You can ask a governed question across CRM, warehouse, and planning data.
 Certify	Once per metric	Pipeline, ARR, and win rate each have one certified definition, signed off by sales, marketing, and finance.
 Consolidate	Every cycle	The pipeline view reconciles automatically, with no manual export step.
 Convert	Every review	The forecast review runs from certified data, with every number traceable live.

This playbook describes a sequence and a framework, not a guarantee. Actual timelines depend on the complexity of your existing CRM, warehouse, and planning setup, and your team's own capacity. Where this playbook references what Quaeris does, that reflects the platform's published capabilities; specific implementation timelines for your situation should be confirmed with your account team.

Conclusion

Revenue trust depends on having one pipeline number, not three, and on being able to defend it live. Quaeris helps RevOps teams move from reconciliation scrambles to governed, decision ready forecasting by connecting directly to existing systems, certifying core metrics, and consolidating the view every cycle.

Next Steps.



See QuaerisAI in action

Explore how trusted AI agents turn your data and documents into answers and actions-securely and at scale.

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Experience governed agentic analytics firsthand. Ask your data and documents and get trusted answers instantly.

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Talk to an Expert

Learn from data and analytics leaders and discover how QuaerisAI drives smarter decisions.

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About QuaerisAI

QuaerisAI is an agent-first analytics platform that helps organizations turn trusted data and documents into answers, insights, and actions.

Unlike traditional analytics tools that require users to navigate dashboards, reports, and multiple systems, QuaerisAI enables teams to simply ask. Trusted AI agents understand context, work within governed access controls, and deliver answers grounded in your organization's data. From structured data to complex documents, QuaerisAI brings analytics, intelligence, and decision-making into one seamless experience.

Built for organizations where trust matters, QuaerisAI combines:

Governed AI agents. Trusted data. Certified metrics. Role-based access. Audit-ready traceability. Because getting an answer quickly is useful. Getting an answer you can trust changes how decisions are made.