Budget Pacing Variance Worksheet

Use this in one spend meeting to classify one variance before moving budget.

1. Name the variance

Plan: _____ Actual: _____ Period: _____
Decision window: This week / This month / Before quarter close / Planning
Action being considered: Hold / Reallocate / Pause / Accelerate / Diagnose
Owner for the call: _____

2. Classify the likely source

Check all that fit:
[ ] Spend timing or invoice posting lag
[ ] Platform delivery, cap, bid, launch, or approval issue
[ ] Campaign taxonomy, UTM, or CRM campaign break
[ ] Attribution window or offline conversion sync lag
[ ] Pipeline quality or stage-movement issue
[ ] CAC, payback, revenue-recognition, or margin movement

3. Evidence needed before action

Spend source to verify: _____
Pipeline/CAC source to verify: _____
Finance or revenue source to verify: _____
Data refresh / lag caveat: _____

4. Confidence label

Directional: useful signal, safe for investigation or small reversible moves.
Decision-grade: timing, source, pipeline, and owner checks support the move.
Cleanup-first: signal may be real, but source logic is too weak to act on.
Selected label: Directional / Decision-grade / Cleanup-first
Reason: _____

5. Choose the next action

[ ] Hold: timing, delivery, or reporting lag is the most likely cause.
[ ] Reallocate: performance, CAC, or pipeline-quality signal is decision-grade.
[ ] Fix data: source, taxonomy, attribution, or refresh logic blocks the call.
[ ] Escalate: the budget risk needs a focused spend-confidence diagnostic.
Action owner: _____ Follow-up date: _____
Next proof point: _____

6. Meeting readout sentence

Use this format before the meeting ends:
The variance appears to be _____. Confidence is _____.
We will _____ by _____, owned by _____.
We will revisit if _____.

Next step

If every review lands on cleanup-first, the issue is not the meeting. It is the spend-to-revenue evidence layer. Start with Where Did the Money Go? or Revenue Analytics when the variance keeps turning into a leadership tax.