

Pipeline Coverage Confidence Worksheet

Domain Methods

Use this before pipeline coverage drives a forecast, spend, board, or executive-readiness decision.

1. Name the metric and decision

Pipeline coverage view: _____

Target period / cutoff date: _____

Decision requested: weekly review / forecast / spend / board / escalation

Current dashboard or packet where it appears: _____

2. Score the six confidence checks

Circle one score for each check: 1 strong, 2 fragile, 3 weak.

Definition: 1 / 2 / 3 What counts and what is excluded? _____

Ownership: 1 / 2 / 3 Who settles disputes? _____

Timing: 1 / 2 / 3 Which cutoff and late-change rule applies? ___

Source path: 1 / 2 / 3 Which CRM/model/table wins? _____

Exclusions: 1 / 2 / 3 Renewals, expansion, stale opps, duplicates?

Usage rule: 1 / 2 / 3 What is this number allowed to decide? _____

3. Assign the confidence band

Guide: 6-8 = board-grade, 9-13 = decision-grade, 14-18 = directional.

Total score: _____

Confidence band: Directional / Decision-grade / Board-grade

Plain-English caveat that must travel with the number: _____

Pipeline Coverage Confidence Worksheet - Decision Rules

4. Decide what the metric can and cannot support

Safe for weekly operating review? Yes / No / With caveat: _____

Safe for forecast or spend decision? Yes / No / With caveat: _____

Safe for board narrative? Yes / No / With caveat: _____

This number should NOT be used yet for: _____

5. Pick the first remediation step

Definition cleanup needed: _____

CRM stage / close-date hygiene needed: _____

Source precedence or warehouse/model check needed: _____

Owner for the fix: _____ Review date: _____

6. Route the real problem

If teams disagree about which version wins, use Three Teams, Three Numbers. If the definition is clear but the source path cannot hold, use Data Foundation.

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