

Revenue Forecast Confidence Worksheet

Use this for one forecast rollup before it supports a board narrative, hiring plan, budget move, cash plan, retention plan, or operating commitment.

1. Name the decision

Decision this forecast will influence: board narrative / hiring plan / budget pacing / cash plan / retention plan / team target / repair escalation.

Forecast period and scope: _____

Segments, motions, or revenue streams included: _____

2. Score the eight controls

Score each control 0-3: 0 missing or disputed; 1 manually rescued; 2 usable with caveats; 3 documented, owned, and reconciled.

Stage definitions: qualification, commit, best case, close-date, and slip rules.

Score: ____

Source precedence: CRM, renewal system, finance view, warehouse model, side forecast.

Score: ____

Pipeline quality: deal age, close-date movement, source, segment, motion, and owner behavior. Score: ____

Renewal and expansion treatment: renewal risk, contraction, expansion, account hierarchy. Score: ____

Override authority: who can change amount, timing, commit, or confidence and why.

Score: ____

Slip history: similar deals, segments, or managers moving out of period. Score: ____

Finance reconciliation: bookings, ARR, billing, recognition, and cash timing. Score: ____

Caveat ownership: who writes and carries the confidence note into the decision.

Score: ____

3. Assign the confidence band

Total possible score: 24. Use veto rules if a critical control is missing for the decision.

0-8: Not safe yet. Use as evidence for repair, not for the requested commitment.

9-15: Directional. Safe for coaching, diagnosis, and cleanup prioritization only.

16-20: Decision-grade. Safe for one named operating decision with caveats visible.

21-24: Board-grade. Safe for board/cash/annual-plan use within documented scope.

4. Apply veto rules

For board, cash, or hiring decisions, source precedence, finance reconciliation, and caveat ownership cannot be missing.

Critical veto found? Yes / No If yes, which control? _____

5. Write the caveat

Forecast confidence note to carry forward: _____

What this forecast should NOT be used for yet: _____

6. Choose the first repair

Weakest control: _____ Owner: _____ Due: _____

First useful repair: stage rule / source precedence / renewal treatment / override log
/ slip review / finance reconciliation / caveat note.

Next review date: _____ Decision owner: _____

Domain Methods next step

If teams disagree about which forecast wins, start with Three Teams, Three Numbers. If the source path cannot hold, start with Data Foundation.