

Sales Capacity Confidence Worksheet

Use this for one capacity plan before it drives hiring, quota, territory, board forecast, or compensation decisions.

1. Capacity decision

Decision this plan will affect: _____

Model owner: _____ Executive sponsor: _____

Scope: hiring / quota / territory / forecast / compensation / board / other

2. Confidence band

Directional: useful for coverage pressure, not formal commitment.

Planning-grade: capacity-specific decision-grade for one hiring, quota, or territory decision.

Board-grade: owners, sources, caveats, reconciliation, and sign-off are documented.

Not safe yet: disputed, manually rescued, or inconsistent across teams.

Current band: Directional / Planning-grade / Board-grade / Not safe yet

Weakest assumption lowering confidence: _____

3. Required controls

Headcount roster: reps, roles, managers, start dates, and active-capacity rules.

Ramp curve: role, segment, motion, enablement milestone, and productive start.

Quota/productivity: quota, attainment, bookings productivity, and comparable history.

Territory/coverage: accounts, segments, regions, partners, and whitespace.

Pipeline dependency: demand coverage required for the capacity expectation.

Attrition/backfill: departures, open roles, hiring delays, and replacement ramp.

Source precedence: HRIS, CRM, finance, warehouse, or RevOps model that wins.

4. Unsafe uses

This plan must NOT be used for: _____

Reason: _____

Minimum repair before leaders depend on it: _____

5. Next repair

Owner: _____ Due date: _____ Review meeting: _____

First repair: roster / ramp / quota / territory / pipeline / attrition / source path

Evidence required before upgrade: _____

Domain Methods note

If the fight is about which team definition should win, start with Three Teams, Three Numbers. If the definition is clear but the source path cannot hold, start with Data Foundation.