

Win-Rate Confidence Worksheet

Use this for one win-rate or stage-conversion metric before it drives hiring, spend, or forecast calls.

1. Metric under review

Decision this metric will affect: _____

Metric owner: _____ Executive sponsor: _____

Metric scope: new business / expansion / partner / self-serve / enterprise / other

2. Confidence band

Directional: useful for trend or risk, not major operating decisions.

Diagnostic-grade: stable enough for one named segment or channel question.

Leadership-grade: stable enough for hiring, spend, forecast, or executive narrative.

Not safe yet: disputed, blended, manually rescued, or distorted by process changes.

Current band: Directional / Diagnostic-grade / Leadership-grade / Not safe yet

Weakest rule lowering confidence: _____

3. Required controls

Opportunity definition: what counts, who creates it, and when it enters the funnel.

Stage rules: entry, exit, and progression rules are written in plain English.

Segment split: enterprise, mid-market, self-serve, expansion, partner, and renewal views are not blended without labels.

Time window: cohort, close-period, or stage-entry basis is documented.

Loss hygiene: closed-lost, no-decision, stale, recycled, and disqualified records are handled consistently.

Source path: CRM report, warehouse model, or finance view that wins is named.

Usage rule: the metric has a clear allowed-use and not-for line.

4. Unsafe uses

This metric must NOT be used for: _____

Reason: _____

Minimum repair before leadership depends on it: _____

5. Next repair

Owner: _____ Due date: _____ Review meeting: _____

First repair: opportunity definition / stage rules / segment split / time window / loss hygiene / source path / usage rule

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.