Category

Commercial Excellence

Commercial Operating Rhythm & Governance Playbook (Reviews, QBRs, Forecasts)

A structured cadence of weekly, monthly, and quarterly commercial reviews that turns forecasting from a spreadsheet guess into a disciplined, auditable process.

- Executive
- Advanced
- Template Included

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- 8 minute(s)

Overview

A governance playbook for running weekly pipeline reviews, monthly business reviews, and quarterly QBRs on a fixed cadence — with a forecast category model that makes commercial numbers defensible to the board.

How do we set forecast category thresholds if we don't have clean historical data?

Start with your best available estimate — even a rough stage-by-stage win rate from the last 2-3 quarters is better than an industry-generic benchmark — and treat the first two quarters as a calibration period. Recalculate the thresholds once you have a full cycle of actuals against the new categories.

Should the weekly pipeline review include every rep on the team?

No — it should be manager-and-rep 1:1s or small pod reviews, capped at 30-45 minutes, focused only on category changes and flagged risk. A full-team weekly forecast meeting almost always balloons past an hour and becomes status theater.

What's the single biggest sign our QBR needs a redesign?

If the account team or sales team leaves the QBR with no new committed action for the next quarter, the meeting was retrospective, not operational. Committed actions with named owners are the actual output of a working QBR.

How do we handle a deal that keeps slipping between Commit and Best Case?

A deal that moves categories more than once in a quarter usually means the entry criteria weren't actually met the first time it was called Commit — treat repeated category flips as a coaching signal for the rep and manager, not just a data anomaly to shrug off.

Is this cadence overkill for a smaller sales team?

The full three-tier structure scales down easily — a 10-person team can run a 15-minute weekly check, a monthly review folded into an existing leadership meeting, and a lighter half-day QBR. The category discipline matters at any team size; the meeting length is what should flex.

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