Category

Commercial Excellence

Sales Forecasting, Pipeline Hygiene & Governance Playbook

Building a forecast the business can actually plan against, not one that surprises everyone at quarter-end

- Practitioner
- Intermediate
- Template Included

- Administrator
- 24 July 2022
- 3 minute(s)

Overview

A framework for sales forecasting, pipeline hygiene, and governance — rigorous pipeline data quality discipline, forecast methodology grounded in genuine historical conversion patterns, and governance that catches forecast risk early rather than discovering misses at quarter-end.

Why do sales forecasts so often miss, even with sophisticated

forecasting tools? Forecasting tools calculate accurately given their inputs, but underlying pipeline data quality — stale opportunities, optimistic stage assignments — often undermines forecast accuracy regardless of methodology sophistication, making pipeline hygiene as important as forecasting technique itself.

What's the most valuable pipeline hygiene practice for forecast

accuracy? Regular, disciplined review of stalled opportunities — deals sitting in a stage well beyond typical cycle length — since these stale opportunities are a common and significant source of forecast inaccuracy that simple hygiene discipline can substantially address.

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