

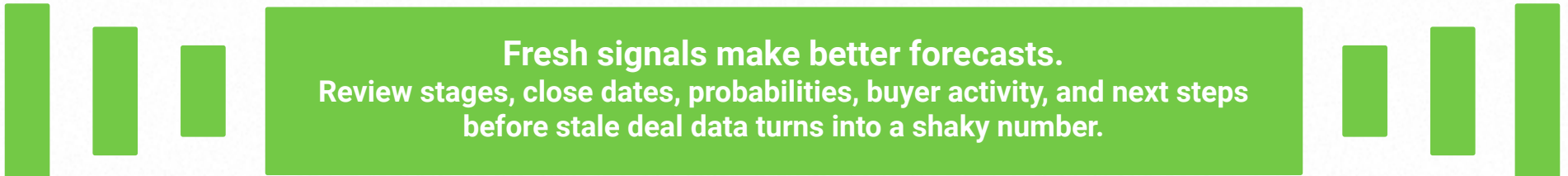


FORECAST

ACCURACY WORKSHEET

**How to Clean up Stale Deal Data and
Make Your Pipeline Forecast Easier to Trust.**

*Your CRM can help your team see what is likely to happen next.
But it can only work with the deal signals it has.*



Fresh signals make better forecasts.
Review stages, close dates, probabilities, buyer activity, and next steps
before stale deal data turns into a shaky number.



What This Worksheet **Helps You Fix**

Use this worksheet to review open deals, identify stale forecast data, and update probabilities based on current pipeline reality.

It helps you check whether deal stages, close dates, buyer activity, and probabilities still reflect what's actually happening.

Use it to check for:

- Deal stages that no longer match what is happening with the buyer
- Close dates that have moved or no longer reflect a realistic timeline
- Probabilities that need to be recalculated using historical close rates and current status
- Deals with little or no recent meaningful buyer activity
- Forecast confidence that is based on optimism instead of evidence

Helpful **reminder**

Low confidence **does not mean a deal is dead.**
It means the forecast should not depend on that deal without fresher evidence.

How to Use This Worksheet

Use this worksheet weekly or before any forecast review where open opportunities influence the number.

- 1 Pull the open deals included in the current forecast.
- 2 Complete one Deal Review Worksheet for each deal that materially affects the forecast.
- 3 Compare the current probability to your historical close rate for that stage.
- 4 Check whether recent buyer activity, close date, and next step support the probability.
- 5 Assign a forecast confidence rating: High, Medium, or Low.
- 6 Choose a recommended forecast action and update the CRM before the forecast is shared.

What counts as meaningful buyer activity?

Meaningful buyer activity is any buyer action that shows real deal momentum.

Examples include a direct reply, attended meeting, completed demo, pricing request, proposal review, confirmed decision process, procurement update, legal review, or buyer-confirmed next step. Internal notes, automated reminders, and generic email interactions can provide context, but they should not be treated as strong momentum signals.

Use this as a clarity tool

Low confidence **does not mean a deal is dead**.
It means the forecast should not depend on that deal without fresher evidence.

Forecast Hygiene Rules

Use these rules to keep your forecast useful, not just organized.

CRM Evidence	What We Noticed
1. Current beats clean-looking.	A polished dashboard can still be wrong if the deal data behind it is stale.
2. Stage labels need evidence.	A late-stage deal should have buyer activity, a clear next step, and a realistic timeline behind it.
3. Close dates are forecast signals.	A close date that keeps moving is not just an admin update. It tells you something about deal confidence.
4. Probabilities need proof.	Default stage probabilities are a starting point, not a substitute for historical close rates and current signals.
5. No next step lowers confidence.	If there is no buyer-confirmed next action, the deal may still be alive, but the forecast should be more cautious.
6. Update the CRM before reporting the forecast.	The forecast should reflect the latest deal reality, not last week's pipeline story.

Hard truth

Stale deal data makes your forecast unreliable. If stages, probabilities, and close dates are not current, **the forecast is working from assumptions - not reality.**

Deal Review **Worksheet**

Use this section for each open deal that affects the forecast.
Copy the worksheet as needed.

Field	Entry
Deal name / ID	
Deal owner	
Account / company	
Deal value	
Current stage	
Current probability	
Historical close rate for this stage	
Recalculated probability	
Current close date	
Has the close date moved?	<input type="checkbox"/> No <input type="checkbox"/> Yes, once <input type="checkbox"/> Yes, 2+ times
Last meaningful buyer activity	Date: _____ Type: _____
Does recent activity support the current stage?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Needs review
Next step with buyer	_____
Next step owner and due date	Owner: _____ Due: _____
Forecast confidence	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low
Recommended forecast action	<input type="checkbox"/> Keep in forecast <input type="checkbox"/> Lower probability <input type="checkbox"/> Move close date <input type="checkbox"/> Move stage <input type="checkbox"/> Mark at risk <input type="checkbox"/> Remove from forecast <input type="checkbox"/> Follow up this week
CRM updated?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Notes / reason for change	

Probability Recalculation Guide

Start with the historical close rate for the current deal stage.
Then adjust based on what is happening now.

The point is not to create a perfect formula. The point is to stop treating stale fields like reliable evidence.

Use these signals to guide the adjustment.

Signal	Question to ask	Forecast direction
Historical close rate for the current stage	What percentage of deals in this stage typically close?	Use this as the baseline.
Recent meaningful buyer activity	Has the buyer replied, attended a meeting, reviewed a proposal, requested pricing, or confirmed a next step?	Maintain or increase confidence.
No meaningful activity	Has nothing changed for 14 to 30 days?	Lower confidence and set a re-engagement step.
Close date movement	Has the close date shifted without buyer confirmation?	Update the date and reduce confidence if the timeline is uncertain.
Buyer-confirmed next step	Is there a specific next action owned by the buyer or agreed to by the buyer?	Maintain or increase confidence.
Missing decision details	Are budget, decision process, stakeholders, or timeline unclear?	Lower confidence until those details are confirmed.
New risk	Has a competitor, procurement delay, legal issue, budget concern, or new stakeholder changed the deal?	Adjust probability and document the reason.

Simple direction

If the CRM probability is higher than the evidence supports, lower it. If the deal has fresh buyer momentum and a confirmed next step, **keep it or raise it with a clear note explaining why.**

Forecast Confidence Rating

Use confidence ratings to separate real momentum from deals that need more validation. Confidence is a read on the quality of the deal signals, not a judgment of the seller.

Rating	Use this when	Recommended action
High Confidence	Stage, close date, probability, buyer activity, and next step all support the forecast. Historical close rates also support the probability.	Keep in forecast. Make sure the CRM reflects the latest buyer activity and next step.
Medium Confidence	Some signals support the forecast, but one or more fields need validation. The close date may have moved, the next step may be unclear, or recent activity may be light.	Keep under review. Update the weak field, confirm the next step, and document what changed.
Low Confidence	The deal has stale data, weak or missing buyer activity, an unrealistic close date, no buyer-confirmed next step, or a probability that no longer reflects reality.	Mark at risk, lower probability, move the close date, move the stage, or remove from forecast until fresh evidence supports it.

Helpful reminder

Low confidence does not mean the deal is gone. It means the forecast should not rely on it without a clearer signal.

Recommended Forecast Actions

When the review surfaces a gap, use it to decide what should happen next.

What you see	What it likely means	What to do next
Late-stage deal, but no recent buyer activity	Momentum may be stale	Mark at risk, lower probability, and set a re-engagement step
Close date has moved more than once	Timeline may be uncertain	Move the date, reduce confidence, and confirm timing with the buyer
Probability is higher than the stage close rate, with no note explaining why	Forecast may be overconfident	Recalculate probability and document the evidence
Buyer requested pricing, proposal, demo, or contract review	Evaluation may be active	Update stage, probability, next step, and owner
No buyer-confirmed next step	Forecast support is weak	Lower confidence and define the next action
New stakeholder, competitor, procurement delay, or budget concern	The deal has changed	Update notes, stage, probability, and forecast confidence.
Deal stage does not match current reality	The pipeline bucket may be wrong.	Move the stage before reporting the forecast.

One metric to track

Percentage of open deals with updated probabilities. This shows whether your forecast is being refreshed with current signals, **not just reviewed in meetings.**

Team Forecast Review Tracker

After reviewing individual deals, use this tracker to capture what changed and whether the CRM was updated. This makes the review actionable instead of just conversational.

Signal	Question to ask	Forecast direction

Review cadence

Update this tracker weekly, then use the changes to improve stage definitions, probability rules, and forecast conversations over time.

What This **Worksheet** Is Really Telling You

You do not need a perfect forecast. You need a forecast that reflects current deal reality.

If the number feels less reliable than it should, the problem may not be sales effort. It may be that the CRM is holding old signals that no longer support the forecast.

This worksheet helps your team fix the right inputs first: stages, probabilities, close dates, buyer activity, next steps, and forecast confidence.

Your CRM already has the clues. Keep them current, and it can help your team see what is coming.



Need Help Turning CRM Clues Into Clearer Growth Moves?

ContentBacon helps teams connect CRM data, buyer behavior, sales follow-up, and content strategy so the right conversations happen at the right time.

If your pipeline is showing gaps, stale signals, or missed opportunities, we can help you turn those insights into smarter content, cleaner follow-up, and stronger customer relationships.



REACH OUT TO CONTENTBACON

to talk through what your CRM is really telling you and how to turn those signals into growth.

LET'S GET COOKING!

(800)-748-5805

info@contentbacon.com

www.contentbacon.com



CB