

NORTHSTAR SAAS

# Forecast Inspection & Pipeline Review Framework

A structured approach to running consistent forecast reviews,  
improving pipeline quality and increasing confidence in the number.

Revenue Operations | Q2 FY25

**SAMPLE MOCKUP**

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# 1. Purpose & Business Problem

## Why this framework exists

Forecast calls can become subjective and inconsistent when teams lack shared stage definitions, deal criteria, and inspection discipline. Without a structured review process, leadership loses confidence in the number, deal risk surfaces too late, and managers default to gut feel over data.

*This framework establishes a repeatable system for forecast reviews built around clear rules, standardized inspection questions, and early risk detection. The goal is to make forecast calls more productive and the resulting number more trustworthy.*

## Key outcomes this framework drives:

- Consistent forecast language across all managers and reps
- Earlier identification of deal risk and pipeline gaps
- Higher confidence in the commit and best-case categories
- Reduced forecast variance quarter over quarter
- Clearer accountability for deal progression and next steps

## 2. Forecast Categories & Definitions

All reps and managers must use the same forecast category definitions. These categories drive the weekly call, the board roll-up, and quarterly planning.

Category	Definition	Confidence	Typical Stage
Commit	Rep and manager believe this deal will close in the current quarter. Mutual close plan confirmed. No known blockers.	90%+	Closing / Final Review
Best Case	Strong signals but at least one variable remains (timing, procurement, final approval). Could close this quarter with favorable conditions.	60-89%	Negotiation / Evaluation
Upside	Deal is progressing but close date is uncertain. Included in upside scenario only. Not counted in manager commit.	30-59%	Proposal / Evaluation
Pipeline	Active opportunity not yet qualified for forecast inclusion. Still in discovery or early evaluation.	<30%	Sales Accepted / BDR Qualified
Omit	Stale or disqualified. Not included in any forecast view. Scheduled for cleanup or close-out.	N/A	Any (flagged for review)

*Rule: Every deal in Commit must have a confirmed close date, identified economic buyer, and a documented mutual action plan. Deals missing any of these belong in Best Case or lower.*

### 3. Weekly Forecast Cadence

The forecast review follows a bottom-up cadence each week. Each level of the organization inspects, validates, and rolls up before the next.

Day	Activity	Owner	Duration	Output
Monday	Reps update CRM: close dates, amounts, forecast categories, next steps	AEs	30 min	Updated pipeline
Tuesday AM	Manager 1:1 pipeline reviews with each rep. Inspect top deals.	Sales Managers	45 min/rep	Validated forecast by rep
Tuesday PM	Manager submits team forecast roll-up with commentary	Sales Managers	30 min	Team forecast summary
Wednesday	Director/VP forecast review across all teams. Cross-check commit vs actuals.	Sales Leadership + RevOps	60 min	Leadership forecast call
Thursday	RevOps publishes weekly forecast snapshot with variance analysis	RevOps	30 min	Forecast report + variance
Friday	Deal strategy sessions for at-risk commit deals (as needed)	AEs + Managers	As needed	Action plans

#### End-of-Quarter Adjustments (Weeks 10-13):

- Daily commit reviews replace the Tuesday/Wednesday cadence
- All commit deals require manager confirmation of close date and next step
- Upside deals not expected to close are moved to next quarter pipeline

## 4. Stage Exit Criteria

Deals cannot advance to the next stage without meeting these criteria. Managers are responsible for validating stage accuracy during weekly reviews.

### BDR Qualified (1%)

Criteria	Details
Required Fields	Contact info, company size, current solution, authority confirmed
Exit Criteria	Confirmed need + timeline. Decision maker identified or intro requested.
If Not Met	Recycle to nurture or disqualify.

### Sales Accepted (30%)

Criteria	Details
Required Fields	Opportunity sized (ACV entered), budget status, segment assigned
Exit Criteria	Discovery completed. Pain identified. Economic buyer known. Metrics discussed.
If Not Met	Return to BDR Qualified or disqualify.

### Evaluation (50%)

Criteria	Details
Required Fields	Demo completed, technical requirements documented
Exit Criteria	Prospect actively evaluating. Testing environment or pilot underway. Champion identified.
If Not Met	Remains in Sales Accepted.

### Proposal / Pricing (40%)

Criteria	Details
Required Fields	Pricing shared, user count confirmed, decision criteria documented
Exit Criteria	Pricing discussed and feedback received. Decision process and timeline confirmed.
If Not Met	Remains in Evaluation.

## Negotiation / Closing / Redline (90%)

Criteria	Details
Required Fields	MSA/contract sent, legal review initiated, procurement engaged
Exit Criteria	Verbal agreement on terms. Redlines in progress. Close date within 30 days.
If Not Met	Remains in Proposal or re-evaluate timeline.

## Final Internal Review (95%)

Criteria	Details
Required Fields	Signed contract received, internal approval routing started
Exit Criteria	Contract signed by customer. Awaiting internal processing only.
If Not Met	Return to Negotiation.

## 5. Deal Inspection Checklist

Managers should ask these questions during weekly 1:1 pipeline reviews. The goal is to pressure-test assumptions, not interrogate reps.

### Pipeline Health Questions

Question	Why It Matters
What has changed since last week?	Forces reps to articulate movement, not just confirm status quo.
What is the real close risk on this deal?	Separates optimism from evidence. Look for specifics, not generalities.
Is there a confirmed next step with a date?	Deals without a next step are stalled. No next step = no progress.
Is the economic buyer engaged?	If the rep has never spoken to the person who signs, the deal is at risk.
Are there pricing, legal, or procurement blockers?	Surface process friction early. These are the most common slip reasons.

### Forecast Accuracy Questions

Question	Why It Matters
Why is this deal in Commit vs Best Case?	Tests whether the rep meets the actual commit criteria, not just confidence.
If this deal slips, what replaces it?	Reveals whether the manager has a backup plan or is over-relying on a single deal.
Has the close date moved before? How many times?	Deals that have slipped 2+ times rarely close on the new date without intervention.
What would make you move this deal down a category?	Identifies the break point. If the rep cannot answer, the category may be wrong.
Is this deal in the customer/prospect CRM correctly?	Hygiene check. Wrong stage, missing fields, or stale data erode forecast accuracy.

## 6. Red Flags & Escalation Triggers

These signals indicate a deal may be at risk and should be flagged during inspection. Red flags do not automatically disqualify a deal but require immediate attention and an action plan. These suggested red flags vary with company niche & sales cycle.

### Deal-Level Red Flags

Red Flag	Severity	Recommended Action
No activity logged in 14+ days	High	Manager outreach to champion. If no response in 7 days, move to Pipeline.
Close date pushed 2+ times	High	Re-qualify timeline. Confirm next step with decision maker directly.
No economic buyer identified	High	Cannot be in Commit. Move to Best Case until EB is confirmed.
Champion has gone silent	High	Attempt multi-threading. If no path to power, escalate or downgrade.
Competitor entered late in process	Medium	Assess differentiation. Confirm decision criteria have not shifted.
Budget not confirmed	Medium	Validate funding source and approval process. Cannot commit without budget.
Legal/security review not started	Medium	If in Negotiation stage, flag as blocker. Engage legal early.
Single-threaded (one contact only)	Medium	Identify and engage additional stakeholders. Build wider consensus.
Deal created 2x average sales cycle	Low	Review whether deal is truly active. Consider recycling to nurture.
No mutual action plan documented	Low	Create MAP before next forecast call. Cannot commit without one.

### Escalation Triggers

The following situations require escalation beyond the manager-rep 1:1:

- Commit deal with \$200K+ ACV
- slips to Best Case or lower mid-quarter
- Any deal in Commit with no logged activity in 10+ days
- Regional or segment forecast drops below 80% of quota coverage
- More than 3 deals from a single rep slip in the same quarter
- Customer-initiated pause or contract hold on a committed deal

*Escalation path: AE notifies Manager within 24 hours. Manager notifies Director/VP at next forecast call. RevOps flags in weekly variance report.*

## 7. MEDDPICC Qualification Checkpoints

MEDDPICC provides the qualification backbone for this framework. Each element should be validated progressively as deals advance through stages.

Element	Definition	Key Questions	Required By Stage
Metrics	Quantifiable measures of value your solution provides.	What goals are you hoping to achieve? How would you measure success?	Sales Accepted
Economic Buyer	The person with final decision authority and budget control.	Who owns the final decision? Who controls the budget?	Evaluation
Decision Criteria	The factors that drive the purchase decision.	What are the most important criteria? How will you compare options?	Evaluation
Decision Process	How decisions are actually made in the organization.	What are the steps required? Who else needs to approve?	Proposal / Pricing
Paper Process	Steps between decision and signed contract.	What paperwork is required? Who reviews it? In what order?	Negotiation
Identify Pain	The specific problems your solution addresses.	What are the biggest issues? What happens if you do nothing?	Sales Accepted
Champion	Person with influence and credibility who supports your solution.	Who will advocate for us internally? Can they influence the EB?	Evaluation
Competition	Who else is being considered and how you differentiate.	Who else are you evaluating? What would make you choose them?	Proposal / Pricing

*Scoring guide: For each MEDDPICC element, rate as Green (confirmed with evidence), Yellow (partially confirmed, needs validation), or Red (unknown or missing). Commit deals should have no more than 1 Yellow and 0 Reds.*

## 8. Cadence & Ownership

Clear ownership prevents forecast reviews from becoming status updates. Each role has specific responsibilities within the weekly cadence.

Role	Forecast Responsibility	Inspection Duty	Frequency
Account Executive	Update CRM by Monday EOD. Accurate stage, amount, close date, forecast category, next steps.	Self-inspect against MEDDPIC. Flag blockers proactively.	Weekly
Sales Manager	Validate rep forecasts in 1:1. Submit team roll-up with commentary by Tuesday PM.	Pressure-test commit deals. Identify risk. Ensure stage criteria are met.	Weekly
Director / VP Sales	Review cross-team forecast. Align commit number with finance.	Challenge manager assumptions. Approve commit list. Escalate to CRO as needed.	Weekly
RevOps	Publish forecast snapshot. Track variance. Maintain dashboards and reports.	Flag hygiene issues. Provide data for inspection. Audit stage accuracy.	Weekly + Monthly
CSM (Renewals)	Update renewal pipeline. Flag at-risk accounts by health score.	Validate renewal timeline and expansion signals.	Weekly

## Business Impact

A structured forecast review process improves call quality, reduces subjectivity, surfaces deal risk earlier, and increases trust in the number. When implemented consistently, organizations typically see:

- 15-25% improvement in forecast accuracy within 2 quarters
- 20%+ reduction in slipped deals through earlier risk detection
- Faster ramp for new managers who inherit a proven inspection framework
- Stronger alignment between sales, finance, and executive leadership on the number

*This is a sample mockup created to demonstrate my approach to forecast inspection and pipeline review. It does not contain confidential or proprietary information. Northstar SaaS is a fictional company.*