For Chief Revenue Officers and Heads of Sales

Forecast calls argue over numbers the model could have checked on Friday.

Each decision below names its evidence and its check.

Decision	Evidence to supply	Check before action
01 / Coverage **Pipeline against plan**	Opportunity export with stage, amount, close date, last activity and owner; plan by segment.	Deal owners confirm stage and date before the number travels.
02 / Velocity **The stage where deals stall**	Stage entry and exit dates for open and closed opportunities, last two quarters.	Read five of the stalled deals yourself before assigning actions.
03 / Handoff **The drop between marketing and sales**	Lead counts by source, month and stage, with the acceptance rule sales applies in practice.	Marketing and sales sign off one definition of a qualified lead.
04 / Readout **Monday's five bullets to the field**	Last week's scorecard, the two exceptions above and what changed since the last readout.	You edit the draft before it goes out under your name.

Same questions, same evidence.

The value is in the comparison. Fix the period, the denominators and the source IDs so week six reads against week one without rebuilding the export.

Influenced pipeline in the revenue line.

Left alone, a model adds pipeline it touched to revenue the team closed. Keep pipeline, bookings and cash on separate lines and reject a draft that sums them.

The CRO owns the call. The model prepares the comparison and surfaces the exceptions. Stage changes, forecast commits and messages to the field stay with a named person.

Measure the workflow: Forecast error by segment · deals moved after review · minutes from export to draft · corrections.

Prepare Monday from the records you already hold.
Bring one weekly decision and its export. We can define the packet, review and first run.

Sample output on page 2. Companion prompt and downloads.

CRO / Monday readout

Monday readout

Illustrative / Synthetic · Northstar Workflow · 21 September 2026 review

Gaps first / TO AGREE

O17 has no owner and its last activity was 28 August. Full stage histories and Sales sign-off on the lead rule are missing. Do not turn this draft into a commit.

€3.60m
Open Q3-close pipeline / S02

3.0×
Pipeline / €1.20m remaining bookings target

€2.82m
Q3 revenue outlook / F01, separate measure

Segment / S01-S02	Open pipeline	Target left	Coverage
Enterprise	€2.40m	€0.80m	3.0×
Growth	€1.20m	€0.40m	3.0×

Monday field readout

1. **Moved:** open pipeline rose €0.20m from €3.40m last Friday. This is pipeline, not revenue. [S02, S03]
2. **Stalled:** O17 has 42 days in procurement (€240k); O23 has 35 (€180k). These are exceptions, not a validated top ten. [S02, S04]
3. **Handoff:** 72 of 120 August qualified leads were accepted (60%). Reasons for the other 48 are missing. [M03]
4. **Tests proposed:** inspect rejected-lead reasons and trial a joint acceptance checklist. Owner and dates: TO AGREE.
5. **This week:** CRO reviews five stalled records when stage histories arrive; deal owners confirm dates before any forecast change.

Release gate: CRO edits the message. No stage updates, commitments or sends are authorised by this sample.

Synthetic evidence: S01-S04, M01-M03, F01. Pipeline snapshot 18 Sep; readout 21 Sep 2026. All amounts EUR.