The Forecast Evidence Kit

Separate buyer evidence from seller confidence before your next forecast call

For sales managers, directors, VPs and revenue leaders

A rep can feel good about a deal while the buyer has made no new commitment. Use this review to make the evidence visible, keep unknowns honest, and choose the next customer conversation.

Ask what changed on the buyer side

Start with a specific change since the last review: a confirmed business outcome, a new stakeholder, a decision step, or a buyer-owned action. A stage change or a rep activity is context. It is not evidence that the buyer is closer to deciding.

Use four evidence checks

Record the buyer outcome, the people needed to decide, the remaining decision path, and the next buyer commitment. Put a date and a source beside each statement. Mark a gap as unknown instead of filling it with optimism.

Choose the next question from the gap

If the decision path is unclear, ask what must happen before the buyer can approve. If a stakeholder is missing, ask who else needs to weigh in. Agree on the next action with the buyer rather than adding an internal task alone.

Keep your forecast policy intact

Use this sheet alongside your existing categories and CRM fields. It is a conversation aid, not a new forecast model or a win-probability calculator. The accountable sales leader still owns the forecast call.

Put conversation context to work

Revenue.io connects captured conversations with Salesforce context so teams can review buyer needs, coach specific moments and follow through on next steps. Use this worksheet with your current process.

See Revenue.io

A deal with a date, but no decision path

Illustrative example, not a customer result. A rep forecasts a software deal for this month after a positive demo.

What the rep knows

The operations lead wants to reduce manual reporting. A demo happened Tuesday. The rep proposed a month-end start, but the buyer has not confirmed that date.

What remains unknown

Who approves the purchase? Is security review needed? Does the buyer have a deadline that makes a decision this month necessary? No approval steps are confirmed.

Useful next conversation

Ask the operations lead: "What needs to happen on your side before you can decide, and who needs to be part of that?" Agree on a next meeting only if it helps answer those questions.

A 15-minute manager review

Spend three minutes on what changed, five on the weakest evidence, five on the next buyer conversation, and two recording the owner and date. Keep the deal category unchanged until your normal forecast process supports a change.

Questions for your next review

1. Which statement can we point to in a buyer conversation?
2. What would have to be true for this close date to hold?
3. What will the buyer do next, and have they agreed?

Your working sheet

Use this for one live deal. Keep facts, interpretations and unknowns separate. Link to your CRM record or a dated note; do not paste confidential buyer data into unsecured copies.

Deal, CRM link and review date

Buyer outcome: evidence, source and date

Decision stakeholders: known people and gaps

Decision path and close-date dependencies

Next buyer commitment: agreed action, owner and date

Biggest unknown and the question that will resolve it

Next review: record what the buyer actually did before changing the forecast.