

A forecast that management and the board can truly stand behind.

When “Forecast Confidence” is especially valuable for you

Forecasts depend on personal judgment; stages, probabilities, and commit are interpreted differently across teams and countries. Reviews explain the numbers instead of deciding on deals, risks, and resources. Variances become visible only when there is little opportunity left to intervene.

Specifically, this means deciding ...

DECIDE	BECAUSE ...
Which opportunities truly belong in the forecast and are well supported	stage and seller optimism do not yet demonstrate customer commitment.
Which number management, the CFO, and the board can stand behind	inconsistent commit and probability logic weakens every resource decision.
Which intervention, resource, and next action follows from every review	status reports without decisions merely document risks instead of changing them.

VALUE LEVER 1 • DESIRED OUTCOME

All leaders read the pipeline and forecast using the same logic.

You receive a sustainable management system—not another CRM report:

- Every relevant opportunity is assessed using the same evidence.** Buying process, customer commitment, competition, value case, and next steps replace subjective probabilities.
- Every review produces a management decision.** Risk, intervention, resources, owner, and next action are defined as binding and tracked in the next review.

VALUE LEVER 2 • HIGH DECISION CONFIDENCE

Your forecast number holds up because it is based on deal evidence rather than personal judgment.

The Forecast Confidence System answers three management questions:

- Define deal strength.** Buying process, customer commitment, competition, value case, and next steps are translated into a small set of verifiable evidence criteria.
Outcome: a shared Pipeline Reading Standard across teams and countries.
- Derive forecast and commit.** Stages, probabilities, commit, and upside follow the deal evidence rather than individual confidence.
Outcome: a forecast number that management and Finance can understand and defend.
- Force a decision in every review.** Risk, intervention, resources, owner, and next action are decided as binding for relevant deals.
Outcome: reviews that drive action instead of backward-looking status reports.

VALUE LEVER 3 • RAPID IMPACT

In approx. 8 weeks, a judgment-based forecast becomes a shared management system.

The system is not designed in theory; it is developed and embedded using real opportunities and existing forecast reviews.

- **Weeks 1–2: Diagnose the forecast logic.** Stages, probabilities, commit, real deals, and current review practices are made comparable.
- **Weeks 3–5: Build standards and decisions.** The Pipeline Reading Standard, forecast logic, Deal Decision Matrix, and review format are defined.
- **Weeks 6–8: Embed in real reviews.** Standards are tested, reviewers are enabled, and rollout and consequences are firmly established.

System principle. First establish a shared way to read deals, then standardize commit and review decisions, and finally embed the logic permanently in the management cadence.

VALUE LEVER 4 • LOW MANAGEMENT EFFORT

Existing pipeline, deals, and reviews are used—not replaced.

Strat-Exx develops the standard using existing opportunities, review formats, and CRM data. Sales remains fully operational throughout day-to-day business.

Only four contributions are required from your organization:

- existing pipeline, stage, forecast, and CRM logic,
- real opportunities from different teams and countries,
- current review formats and participation by sales leadership,
- decisions on evidence standards, commit, and consequences.

VALUE LEVER 5 • LIMITED SYSTEM RISK

No CRM changes until the forecast logic proves effective in real reviews.

The greater risk is not delaying a CRM change. It is hard-coding inconsistent management logic and creating false precision instead of confidence in the forecast.

The system limits this risk:

- Evidence criteria are calibrated using real opportunities.
- Commit and upside follow a transparent, shared logic.
- Every review ends with an owner, intervention, and next action.
- CRM changes follow only after the Reading Standard has proven effective.

Proven experience. At a company with approximately €1.2 billion in revenue, the forecast variance fell from 19% to less than 8% within two quarters after a Pipeline Reading Standard and binding deal decisions were introduced.

By the end of the project, all decision-making foundations are in place:

- A. a binding **Pipeline Reading Standard** with a small set of verifiable evidence criteria,
- B. a shared **forecast, commit, and upside logic** across teams and countries,
- C. a Deal Decision Matrix for risk, intervention, resources, and next action,
- D. a one-page **forecast and pipeline review format** with binding decisions,
- E. a clear **review and escalation cadence** for Sales, Finance, and management,
- F. a **rollout and reviewer enablement plan** for lasting adoption.

The standard. What matters is not the number of completed CRM fields, but how early risks become visible and how confidently management can stand behind the forecast.

How large is the gap between your official forecast and the number your leaders actually believe in?

YOUR CONTACT



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CONFIDENTIAL STRATEGY DISCUSSION

30-Minute Discussion

Via Google Meet · book anytime

calendly.com/clemens-oertel-strat-exx/30min

SCAN & BOOK

