



CRM Sales Forecasting Accuracy Checklist 2026

Historical Data Validation

Review and verify the integrity of past sales cycles, win/loss ratios, and seasonal trends to establish a reliable baseline for projections.

Data Audit Date

Historical Period Analyzed

- ☐ Last Quarter
- ☐ Last 6 Months
- ☐ Last 12 Months
- ☐ Year-over-Year

Historical Win Rate (%)

Data Sources Verified

- ☐ CRM Transaction Logs
- ☐ Legacy Spreadsheet Exports
- ☐ ERP/Accounting Records
- ☐ Marketing Attribution Data

Discrepancy Notes

Write something...

Data Auditor Approval

Pipeline Stage Standardization

Ensure all sales stages are clearly defined and that movement criteria between stages are consistently applied across the CRM.

Current Pipeline Stage Definition

- ☐ Lead/Prospecting
- ☐ Discovery/Qualification
- ☐ Proposal/Negotiation
- ☐ Closing/Contracting

Exit Criteria for Each Stage

Write something...

Required Documentation per Stage

- ☐ Qualified Lead Form
- ☐ Signed NDA
- ☐ Quote/Proposal Document
- ☐ Legal Approval

Last Standardization Audit Date

Enter date...

Discrepancy Notes & Observations

Write something...

Lead Scoring & Qualification Review

Audit the weighting of lead scoring parameters to ensure high-intent prospects are accurately reflected in the revenue forecast.

Lead Scoring Model Type

- ☐ Demographic-Based
- ☐ Behavioral-Based
- ☐ Hybrid (Demographic + Behavioral)

Current Minimum Lead Score Threshold

Enter a number...

Scoring Criteria Verified

- ☐ Firmographic Data (Industry, Revenue, Size)
- ☐ Behavioral Triggers (Email opens, Website visits)
- ☐ Engagement Level (Meeting booked, Content downloaded)
- ☐ Contact Information Accuracy

Discrepancies Found in Scoring Logic

Write something...

Last Scoring Logic Audit Date

Enter date...

Deal Value & Probability Audit

Verify that all open opportunities have accurate deal amounts and that probability percentages align with the current stage of the sales cycle.

Current Estimated Deal Value

Enter a number...

Confidence Level

- ☐ High Confidence
- ☐ Medium Confidence
- ☐ Low Confidence

Expected Close Date

Enter date...

Probability Justification Notes

Write something...

Risk Factors Identified

- ☐ Budget Constraints
- ☐ Competitor Presence
- ☐ Decision Maker Unavailability
- ☐ Technical Complexity

Sales Manager Approval

Sales Representative Input Verification

Check for manual overrides or outdated 'close dates' entered by sales reps that may skew the automated forecasting models.

Date of Last Pipeline Review

Enter date...

Reviewer Role

- ☐ Sales Representative
- ☐ Sales Manager
- ☐ Sales Operations

Verified Data Points

- ☐ Deal Amounts
- ☐ Expected Close Dates
- ☐ Next Step Activities
- ☐ Contact Information

Notes on Discrepancies Found

Write something...

Representative Acknowledgment

Weighted Pipeline Calculation Check

Validate the mathematical accuracy of the weighted pipeline formula (Deal Value x Probability) against actual projected revenue.

Total Pipeline Value

Enter a number...

Weighted Forecast Value

Enter a number...

Calculation Methodology Used

- ☐ Weighted Probability
- ☐ Stage-Based Weighting
- ☐ Historical Win-Rate Average
- ☐ Manual Adjustments Only

Forecast Review Date

Enter date...

Discrepancy Notes

Write something...

Auditor Approval

External Factor Integration

Assess the inclusion of market volatility, macroeconomic trends, and competitor activity into the forecasting logic.

Identified Market Risk Factors

☐ Competitor Pricing Changes

☐ Economic Inflation/Recessionary Trends

☐ Regulatory/Compliance Shifts

☐ Supply Chain Disruptions

☐ Seasonal Industry Fluctuations

Market Trend Impact Summary

Write something...

Macroeconomic Review Date

Enter date...

Estimated Impact Percentage (0-100)

Enter a number...

Supporting Market Research Report

 Upload File

Forecast Variance Analysis Setup

Define the process for comparing monthly/quarterly forecasted figures against actual closed-won revenue to identify discrepancies.

Forecast Review Period End Date

Enter date...

Target Variance Threshold (%)

Enter a number...

Variance Severity Level

- ☐ Low (< 5%)
- ☐ Medium (5-15%)
- ☐ High (> 15%)

Primary Drivers of Variance

- ☐ Inaccurate Lead Scoring
- ☐ Sales Cycle Delay
- ☐ Lost Competitor Deals
- ☐ Data Entry Errors

Root Cause Analysis Summary

Write something...

Supporting Variance Report



Upload File

Finance Manager Approval

< Previous

> Next

🏁 Finish

🛠️ Generate Sample Report