

**HOW TO USE THIS TEMPLATE:**

**Step 1**

- Go to the "FILL IN" tab
  - Add your reps names
  - Add the stages of your sales process
  - Add your forecast categories and probabilities of each
- Note: Leave probability for closed-won and closed-lost at 0% to keep closed deals out of your forecast*

**Step 2**

- Go to the "Sales Pipeline" tab
- Add accounts
- Select account owner
- Update opportunity information

**Step 3**

Sales forecast value will update automatically for each deal based on forecast category and opportunity amount

Enter weekly meeting activity for each rep.

**FOR NAMED ACCOUNTS:**  
Enter weekly account activity for each rep.

Enter total accounts owned for each rep (Column C).











Account	Account owner	Contact name	Contact email	Amount	Stage	Close date	Last activity	Next steps	Forecast category	Forecast value	Notes
<b>TOTAL</b>				<b>\$918,123.50</b>						<b>\$355,968.40</b>	
Company A	Adam A.	Mary Lindros	mary.lindros@companya.com	\$15,000.00	Discovery	11/30/2022	04/29/2022		Pipeline	\$1,500.00	
Company B	Beth B.	Jack Davidson	jack.davidson@companyb.com	-	Qualification	09/01/2022	05/13/2022		Omitted		
Company C	Chris C.	Martin Lee	martin.lee@companyc.com	\$47,623.00	Presentation 2	10/09/2022	06/06/2022		Best case	\$19,049.20	
Company D	Diana D.	Jenny Almeria	jenny.almeria@companyd.com	\$13,000.00	Presentation 1	08/28/2022	05/24/2022		Best case	\$5,200.00	
Company E	Elvis E.	Eduardo Smith	esmith@companye.com	\$110,000.00	Presentation 2	09/15/2022	06/02/2022		Most likely	\$66,000.00	
Company F	Adam A.	Erling Haaland	eh@companyf.com	\$29,000.00	Alignment	10/31/2022	05/10/2022		Omitted	\$0.00	
Gong	Beth B.	Jonathan	jonathan@gong.io	\$33,000.00	Closed-Won	05/13/2022	05/13/2022	-	Closed	\$0.00	
Company H	Chris C.	David Reed	david@companyh.com	\$72,000.00	Closed-Won	03/31/2022	03/31/2022	-	Closed	\$0.00	
Company I	Diana D.	Jose Blanco	jblanco@companyi.com	\$12,750.50	Closed-Won	04/30/2022	04/30/2022	-	Closed	\$0.00	
Company J	Elvis E.	Will Frost	will.frost@companyj.com	\$43,000.00	Closed-Lost	03/31/2022	03/31/2022	-	Closed	\$0.00	
Company K	Adam A.	Matthew McGraw	matt@companyk.com	\$126,000.00	Presentation 2	07/31/2022	05/10/2022		Most likely	\$75,600.00	
Company L	Beth B.	Samantha Henry	samantha@companyl.com	\$62,150.00	Discovery	10/31/2022	06/01/2022		Omitted	\$0.00	
Company M	Chris C.	Georgina Little	g.little@companym.com	\$57,577.00	Presentation 1	07/31/2022	05/30/2022		Most likely	\$34,546.20	
Company N	Diana D.	Stuart Middle	smiddle@companyn.com	\$11,990.00	Validation	09/15/2022	05/13/2022		Commit	\$10,791.00	
Company O	Elvis E.	Russell Barbizon	rb@companyo.com	\$15,600.00	Alignment	09/23/2022	05/23/2022		Commit	\$14,040.00	
Company P	Adam A.	Kelly Saint-Germain	kelly@companyp.com	\$23,430.00	Alignment	07/31/2022	06/03/2022		Most likely	\$14,058.00	
Company Q	Beth B.	Dana Franski	dana.franski@companyq.com	\$78,560.00	Validation	10/31/2022	06/01/2022		Commit	\$70,704.00	
Company R	Chris C.	Omar Henni	omar@companyr.com	\$56,243.00	Closed-Lost	05/13/2022	05/13/2022	-	Closed	\$0.00	
Company S	Diana D.	Tristan Brighton	tb@companys.com	\$98,900.00	Presentation 2	10/31/2022	05/15/2022		Best case	\$39,560.00	
Company T	Elvis E.	Parik Patel	patel@companyt.com	\$12,300.00	Presentation 1	07/31/2022	05/13/2022		Best case	\$4,920.00	

	<b>Your team:</b>	
	<b>Rep Name</b>	<b>Quota</b>
	Adam A.	\$80,000
	Beth B.	\$80,000
	Chris C.	\$80,000
	Diana D.	\$80,000
	Elvis E.	\$80,000
	<b>Your sales stages:</b>	
	<b>Stage</b>	<b>Name</b>
	1	Qualification
	2	Discovery
	3	Presentation 1
	4	Presentation 2
	5	Alignment
	6	Validation
	7	Closed-Won
	8	Closed-Lost
	<b>Your forecast categories:</b>	
	<b>Category</b>	<b>Probability</b>
	Pipeline	10%
	Best case	40%
	Most likely	60%
	Commit	90%
	Ommited	0%
	Closed	0%