

# PRE-SALES DECISION SYSTEM

Controlled Decision Architecture  
for Revenue Permissioning and Forecast Integrity

# PURPOSE

Convert uncertainty into governed decision signal before revenue is permitted to enter forecast or contract stages.

Replace optimistic progression with certified, auditable decisions.

# DECISION AUTHORITY

- Pre-sales owns opportunity certification
- Permitted states: **GO / CONDITIONAL-GO / NO-GO**
- Sales cannot override certification
- Certification controls forecast inclusion, not conversation

No certification → no forecast inclusion.

# SCOPE

This system applies to:

- All opportunities above defined complexity, risk, or economic thresholds
- All opportunities requiring technical, operational, compliance, or delivery validation
- All opportunities included in forecast reporting

Deal uncertainty does not disqualify opportunities.

**Uncertified uncertainty disqualifies forecast inclusion.**

Deals outside scope cannot bypass pre-sales certification when risk is present.

# SYSTEM ARCHITECTURE

## CRM: Decision Authority Layer

- Records certification state
- Enforces progression and forecast eligibility

## LMS: Evidence & Signal Layer

- Stores decision artifacts
- Captures validation outputs
- Maintains auditability and ownership

## BINDING RULE

No validated decision artifact

→ no certification state

→ no forecast inclusion

# DECISION INPUTS

Pre-sales decisions are issued only when uncertainty is converted into structured signal.

Signal is produced through validated decision artifacts.

Decision artifacts do not support selling.

They determine whether revenue is permitted to enter forecast.

All artifacts must be:

- Completed
- Validated
- Logged in the LMS

Absence of any required artifact defaults to:

- **NO-GO** if budget, feasibility, or decision-authority risk is present
- **CONDITIONAL-GO** if delivery, timing, or adoption conditions remain unresolved

Risk severity is determined by impact on feasibility, buyer decision authority, delivery viability, or economics.

Risk acceptance does not remove ownership.

Accepted risk transfers accountability to a named risk owner.

Risk acceptance without an accountable owner is invalid.

## REQUIRED ARTIFACTS

- Risk Register (Pre-Contract)
- Stakeholder Decision Map
- Assumption Ledger
- Exit Criteria

# RISK REGISTER (PRE-CONTRACT)

## PURPOSE

Identify and govern risks that can invalidate feasibility, authority, economics, or delivery before commercial commitment.

## REQUIRED CONTENT

- Risk description
- Risk category (**technical / operational / compliance / timeline / budget**)
- Named risk owner
- Mitigation plan **or** explicit risk acceptance

**Budget risk** includes lack of authorization, conditional or insufficient funding, buyer-side funding constraints, or misalignment between scope and available budget.

## DECISION IMPACT

- Unowned or unmitigated **budget, feasibility, or decision-authority risk** → **NO-GO**
- Mitigated **delivery, timing, or adoption risk** → **CONDITIONAL-GO**

Risk acceptance transfers accountability to the named risk owner.

Risk acceptance without an accountable owner is invalid.

# STAKEHOLDER DECISION MAP

## PURPOSE

Certify that the buyer's decision authority, constraints, and approval path are known before forecast inclusion.

## REQUIRED CONTENT

- Economic buyer identified
- Technical and operational approvers mapped
- Budget authority confirmed
- Decision criteria explicit
- Approval path and timing defined

## DECISION IMPACT

- No identified economic buyer → **NO-GO**
- Incomplete authority or approval path → **CONDITIONAL-GO**
- Clear authority, criteria, and path → **GO**

Deals without decision authority cannot be forecast reliably.

# ASSUMPTION LEDGER

## PURPOSE

Make all assumptions explicit and govern their validity before forecast inclusion.

## REQUIRED CONTENT

- Assumption statement
- Assumption type (technical / operational / budget / timing / adoption)
- Validation status (validated / unvalidated / invalidated)
- Named owner
- Explicit kill-condition if the assumption fails

## DECISION IMPACT

- Invalidated budget, feasibility, or decision-authority assumption → **NO-GO**
- Unvalidated assumption impacting scope, timeline, or adoption → **CONDITIONAL-GO**
- All assumptions validated → **GO**

Assumptions without a named owner or kill-condition are invalid inputs.



# EXIT CRITERIA

## PURPOSE

Define non-negotiable conditions under which a deal must be stopped, regardless of momentum.

## REQUIRED CONTENT

- Explicit stop conditions (technical, operational, compliance, budget, authority)
- Trigger events that activate a stop
- Named owner responsible for escalation

## DECISION IMPACT

- Exit criterion triggered → **NO-GO**
- Exit criterion pending or conditional → **CONDITIONAL-GO**
- No active exit criteria → **GO**

Exit criteria override commercial pressure.

# DECISION LOGIC

## GO:

- No unresolved exit criteria
- Decision authority confirmed
- Budget, feasibility, and delivery validated
- All required artifacts complete

## CONDITIONAL-GO:

- Open conditions with defined owners and deadlines
- No active exit criteria
- Failure to resolve conditions → **NO-GO**

## NO-GO:

- Exit criterion triggered
- Invalidated budget, authority, or feasibility
- Unowned or ungoverned risk

Decisions are final unless artifacts materially change.

# FORECAST GOVERNANCE

Two forecasts operate in parallel.

## Sales Forecast

- Probability of close
- Owned by Sales

## Pre-Sales Forecast

- Probability of delivery and adoption
- Owned by Pre-Sales

Only **certified deals** may enter forecast commitment.

If forecasts diverge → escalation required.

If **NO-GO** → deal excluded from forecast.

# ENFORCEMENT

- Opportunity progression is locked to certification state
- Forecast eligibility reflects certification outcome
- **CONDITIONAL-GO** states require explicit resolution deadlines
- **NO-GO** states block forecast inclusion

Revenue without certification is treated as risk exposure.

# METRICS

Metrics exist to monitor system integrity, not individual performance.

- Distribution of **GO / CONDITIONAL-GO / NO-GO**
- Forecast accuracy delta (Sales vs Pre-Sales)
- Late-stage deal failure rate
- Risk recurrence frequency
- Time-to-certification

Metrics are reviewed to correct the system, not override decisions.

Metrics are used to adapt future procedures and controls.

# OUTPUT

This system outputs **permissioned revenue**.

Deals may progress commercially.

Only **certified deals** may enter forecast commitment.

# OPERATIONAL CLARIFICATION

This system does not introduce new activities.

It formalizes work that already exists:

- risks already discussed
- assumptions already made
- decisions already taken

The change is structural:

- judgment becomes signal
- conversation becomes artifact
- intuition becomes decision state

No additional steps are required.

Only clearer outputs.

# DECISION RATIONALE

Pre-sales holds decision authority because it sits closest to feasibility, delivery reality, and adoption risk.

Uncertainty is not eliminated. It is made explicit and governed.

Forecast integrity requires that only certified revenue is treated as commitment. Early risk correction is cheaper than late remediation.

This system optimizes for:

- forecast credibility
- delivery reliability
- accountable risk ownership