THE RESULT

"Commit $14.2M, up 18%"? Under our own policy, $6.7M.

A Regional Sales Director checks his region's commit deal by deal before his VP takes the number to the CEO, with any AI chat his company allows.

THE RESULT What Owen sends his VP before Monday's call. Fictional company.

TALVORA GROUP · Q4 FORECAST · REGION

Q4 commit, checked against our forecast policy

For: Priya Raman, VP Sales
From: Owen Clarke · December 2

THE NUMBER

Q4 commit under our policy is $6.70M from three deals: Brightwell (signed PO), Kepler and Nordhaven (verbal awards, Nordhaven converted from euros). All six listed deals together are $14.55M in US dollars. · Inputs 3, 4

WHAT CAME OUT, AND WHY

Ferro	Calder	Tessin	Last-quarter comparison
$3.0M out	$2.8M out	$2.05M to Q1	Not shown
Negotiation; Nov 20 date passed	Proposal stage	Jan 15; already in Q1	Basis of the $12.0M unconfirmed

BEFORE MONDAY

Lucas on Ferro and Calder: any award or PO the CRM doesn't show? Mei: Brightwell's PO in hand by December 4. Best case and pipeline aren't checked yet. · Inputs 3, 5

CAUGHT ON REVIEW

1. Two deals in **euros were added as dollars**
2. Ferro and Calder **aren't at a commit stage**, and **Ferro's close date has passed**
3. Tessin closes in January and is **counted in two quarters**

UC-001 · SC-16 · REV A	
FOR **Regional Sales Director**	SECTOR **Industrial automation**
COMPANY **58,000 people · 40 sites**	TASK **Check the region's commit forecast before it goes to the CEO**
WRITTEN FOR **ChatGPT · Claude · Gemini · Copilot**	
AI TEST **Claude, Nov 13, 2026 · 6 of 6 found**	

STEP 0 · THE MESS

What landed on Owen's desk

A VP who's taking his number to the CEO, a confident slide, six deals from the CRM, the forecast policy, and two short notes from reps. The policy and the notes change the number.

EMAIL · VP SALES [1]

Q4 forecast

"I'm taking the commit number to the CEO, so it needs to be solid."

1 **High stakes.**

DRAFT SLIDE [2]

Roll-up

"Q4 commit: $14.2M. Up 18% on last quarter's $12.0M."

2 **Forecast against an actual.**

CRM EXPORT [3]

Commit deals

Six deals. Two in EUR. One at Proposal. One closing Nov 20. One closing Jan 15.

3 **Check each line.**

FORECAST POLICY [4]

Commit rules

Signed PO or verbal award, closing in the quarter. USD at EUR 1 = USD 1.08.

4 **The test.**

REP NOTES [5]

Ana and Lucas

"I've also put it in my Q1 number." "Procurement has gone quiet since November 12."

5 **Two quiet warnings.**

YOU'RE NOT ALONE

45%

of sales leaders and sellers had high confidence in their organisation's forecasting accuracy.

Gartner, State of Sales Operations Survey, press release, February 2020. Source

STEPS 1–3 · HOW IT WORKS

Three steps, one chat

Here the AI checks a forecast against your own rules. The prompt lists exactly what to test.

1 Open a new chat

Use the AI tool your company approves: ChatGPT, Claude, Gemini or Copilot.

2 Paste the prompt and the inputs

Copy the prompt and the five fictional inputs from the appendix into one message.

3 Recalculate the commit yourself

Add the deals that pass, in one currency. Then decide what you'll tell your VP before the call.

THE PROMPT, PART BY PART

COPY-READY VERSION IN THE APPENDIX

I'm a Regional Sales Director at an industrial automation company. My region's fourth-quarter forecast goes to our VP Sales on Monday, December 7, and she's taking the commit number to the CEO. Today is December 2. Below are her email, our draft roll-up slide, the commit deals from our CRM, our forecast policy and notes from two reps.

1 **Who you are, who's using the number, when, and what you were sent.**

Please give me:

1. **Is the commit number solid?** Yes or no, in two sentences.
2. **A table of the commit deals**: each one, whether it meets our policy, and why.
3. **A corrected commit number** in US dollars, with the arithmetic shown.
4. **The deals I should question** with my reps before Monday.

2 **A yes or no, a table against the policy, a corrected number, and the deals to question.**

Check every deal against the policy: stage, close date, quarter and currency. Look for deals counted twice and dates that have already passed. Show your arithmetic. Don't add facts that aren't in the inputs.

3 **The heavy lifting: test every deal on stage, close date, quarter and currency, and look for double counting and dates already passed. It found all six problems.**

WHERE TO PASTE

Every tool has one message box. Paste the prompt, add a blank line, paste the inputs, send. CRM exports can be attached as files if your tool allows it.

SAFE TO TRY

Practise with the fictional deals first. Real customer names and deal values are confidential: use only your company's approved tool.

THE AI'S FIRST ANSWER

What Claude actually wrote

Exactly as it came back, not edited. Read it the way Owen did: check each point against the source it cites.

UNEDITED Claude · fresh session, no other context · Nov 13, 2026 · one run

1. Is the commit number solid?

No. The $14.2M is the six amounts added together as listed, so it includes two deals that are not at a commit stage, one deal that closes outside Q4 (and is also in Ana's Q1 number), and two euro amounts counted as if they were dollars. Only three deals meet the policy, for a corrected commit of **$6.7M**. `found`

2. Commit deals checked against policy

Policy [4]: commit means a signed PO or verbal award, with a close date on or before December 31, reported in USD at EUR 1 = USD 1.08.

Deal	Rep	Amount	Stage	Close date	Meets policy?	Why
Ferro Mining line upgrade	Lucas	USD 3.0M	Negotiation	Nov 20	**No**	Negotiation is not a signed PO or a verbal award. The Nov 20 close date has already passed (today is Dec 2). Lucas says procurement has been quiet since Nov 12 [5]. `found`
Calder Steel automation	Lucas	USD 2.8M	Proposal	Dec 22	**No**	Proposal is not a signed PO or a verbal award. The date is inside Q4, but the stage fails. `found`
Nordhaven Ports retrofit	Ana	EUR 2.5M	Verbal award	Dec 18	**Yes**	Stage and date qualify. It has to be converted: EUR 2.5M = USD 2.70M. `found`
Brightwell Foods controls	Mei	USD 2.4M	Signed PO	Dec 4	**Yes**	Signed PO, closes inside Q4.
Tessin Pharma packaging	Ana	EUR 1.9M	Verbal award	Jan 15	**No**	The close date is in Q1, after Q4 ends on Dec 31. Ana has also put it in her Q1 number [5], so it is counted twice. It is also in euros (EUR 1.9M = USD 2.052M). `found`
Kepler Water SCADA	Mei	USD 1.6M	Verbal award	Dec 11	**Yes**	Verbal award, closes inside Q4.

3. Corrected commit number (USD)

How the draft got $14.2M: 3.0 + 2.8 + 2.5 + 2.4 + 1.9 + 1.6 = 14.2. That is every row added as listed, with EUR treated as USD.

Corrected, counting qualifying deals only:

- Nordhaven: EUR 2.5M × 1.08 = USD 2.70M
- Brightwell: USD 2.40M
- Kepler: USD 1.60M
- **Total: 2.70 + 2.40 + 1.60 = USD 6.70M** `found`

What comes out (14.2 − 6.7 = 7.5 in the draft's mixed units): `A: one currency`

- Ferro: 3.0 (USD)
- Calder: 2.8 (USD)
- Tessin: 1.9 (EUR)
- Nordhaven currency effect: −0.2 (it was in at 2.5 and is now in at 2.7)

Check: 14.2 − 3.0 − 2.8 − 1.9 + 0.2 = 6.7.

Two knock-on points for the slide:

- **"Up 18% on last quarter's $12.0M" no longer holds.** 14.2 / 12.0 = 1.183, so the 18% was correct arithmetic on the wrong number. On $6.7M the figure would be 6.7 / 12.0 = 0.558, about 44% down. That comparison only works if last quarter's $12.0M was built on the same basis (policy-qualifying deals, in USD at the plan rate). The inputs don't say whether it was, so treat it as **unverified**. `B: drop the comparison`
- **Best case ($19.0M) and pipeline ($31M):** the inputs don't show what they're made of. It's unknown whether they also mix EUR and USD or include Tessin. Don't present them as checked.

4. Deals to question with your reps before Monday

- **Lucas, Ferro (USD 3.0M):** Why is it in commit at Negotiation? What happened after the Nov 20 close date passed, and is there any contact since procurement went quiet on Nov 12? It needs a realistic new stage and date, or it moves out of commit.

- **Lucas, Calder (USD 2.8M):** It's at Proposal, so it isn't commit under the policy. Is there a verbal award or PO that the CRM doesn't show? If not, it belongs in best case.
- **Ana, Tessin (EUR 1.9M):** The close date is Jan 15 and she has already put it in Q1. Take it out of the Q4 commit so it isn't counted in two quarters, and confirm the CRM is right.
- **Ana, Nordhaven (EUR 2.5M):** Confirm the verbal award and the Dec 18 date. Make sure it is reported as USD 2.7M, not 2.5M.
- **Mei, Brightwell (USD 2.4M):** It closes Dec 4, two days from now and before Monday. Confirm the PO is actually signed and in hand, so you can report it as closed or confirmed on Monday.
- **Mei, Kepler (USD 1.6M):** Confirm the verbal award and that Dec 11 still holds.

For Priya: the region's commit under policy is **USD 6.7M** (three deals). Ferro and Calder (USD 5.8M combined) can be shown as best case only if the reps give you a reason to. Tessin belongs in Q1 only. `C: tell her today`

`found` caught a planted problem `A-C` Owen changes it; see the next section

THE HUMAN PART

What Owen changed, and why

Claude found every planted problem and showed its arithmetic. Owen fixed one slip in the bridge and decided what his VP should hear, and when.

WHAT CLAUDE FOUND: 6 OF 6 PLANTED PROBLEMS

One run

- ✓ Euros added as dollars
- ✓ Ferro's close date has passed
- ✓ Two deals below commit stage
- ✓ Tessin counted in two quarters
- ✓ Corrected commit $6.70M
- ✓ “Up 18%” compares unlike numbers

THREE EDITS, ONE CATCH AND TWO JUDGMENT CALLS

	CLAUDE WROTE	OWEN'S VERSION	WHY · ACCURACY
A	“What comes out (14.2 – 6.7 = 7.5 in the draft's mixed units) … Nordhaven currency effect: −0.2”	**All six deals in US dollars total $14.55M. The three that pass policy total $6.70M.**	The bridge mixes euros and dollars, the same error the answer had just pointed out, and lists the currency effect with the wrong sign.

	CLAUDE WROTE	OWEN'S VERSION	WHY · DECISION
B	“On $6.7M the figure would be … about 44% down … treat it as unverified.”	**No comparison with last quarter on the page until finance confirms how the $12.0M was built.**	The AI said the comparison was unverified, then gave a number anyway. A “44% down” that reaches the CEO is as risky as the “18% up” it replaces.

	CLAUDE WROTE	OWEN'S VERSION	WHY · AUDIENCE
C	“For Priya: the region's commit under policy is USD 6.7M.”, for Monday's call.	**Owen sends Priya the corrected number on Wednesday, with what he's checking before Monday.**	She's taking the number to the CEO. Halving it on the call would leave her no time to adjust.

What only you can do Fix the arithmetic, keep an unverified comparison off the page, and give your boss bad news early. The AI checked the deals. You protect the people who'll repeat your number.

YOUR TURN

Make it yours

Use it whenever a number built from many lines goes to someone senior: a forecast, a pipeline, a bookings report.

YOUR PROMPT: FILL IN THE BRACKETS

I'm the **[your role]** at a **[industry]** company. **[The forecast]** goes to **[who]** on **[date]**, and **[how it will be used]**. Today is **[date]**. Below are **[the request, the draft, the deal list, our policy and notes from the team]**.

Please give me: **1. Is the [commit] number solid?** Yes or no, in two sentences. **2. A table of the deals**: each one, whether it meets our policy, and why. **3. A corrected number** in **[currency]**, with the arithmetic shown. **4. The deals I should question** before **[the meeting]**.

Check every deal against the policy: stage, close date, quarter and currency. Look for deals counted twice and dates that have already passed. Show your arithmetic. Don't add facts that aren't in the inputs.

FIVE CHECKS BEFORE YOU SEND

1. Every amount is in one currency, at the stated rate.
2. Every deal meets the stage and date rules.
3. No deal appears in two quarters.
4. Any comparison uses numbers built the same way.
5. Your boss hears the change before the meeting.

MAKE IT REPEATABLE (OPTIONAL)

Save the prompt once and reuse it every forecast cycle: a custom GPT in ChatGPT, a project in Claude, a Gem in Gemini, or an agent in Copilot. Some companies switch these off; copy and paste always works.

WITH REAL DATA

Customer names, deal values and forecasts are confidential. Use only the AI tool your company approves, and follow its rules.

WHAT THIS EXAMPLE SHOWS

One run of this prompt in Claude found all six problems planted in a fictional forecast and showed its arithmetic.

WHAT IT DOESN'T SHOW

That every tool, setting or run will do the same, how much time it saves you, or which deals will actually close. Talvora Group and its people are fictional.

APPENDIX

Copy-ready: the prompt and the five inputs

Copy the prompt, then all five inputs, into one message in a new chat. Everything here is fictional and safe to paste.

THE PROMPT

I'm a Regional Sales Director at an industrial automation company. My region's fourth-quarter forecast goes to our VP Sales on Monday, December 7, and she's taking the commit number to the CEO. Today is December 2. Below are her email, our draft roll-up slide, the commit deals from our CRM, our forecast policy and notes from two reps.

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[1] EMAIL FROM PRIYA RAMAN, VP SALES

Subject: Q4 forecast call, Monday

Owen, your region's draft shows a commit of $14.2M. I'm taking the commit number to the CEO, so it needs to be solid. See you Monday.

[2] DRAFT ROLL-UP SLIDE

Q4 commit: **$14.2M**. **Up 18% on last quarter's $12.0M.** Best case: $19.0M. Pipeline: $31M.

[3] COMMIT DEALS, FROM THE CRM (AMOUNTS IN MILLIONS)

Deal	Rep	Amount	Currency	Stage	Close date
Ferro Mining line upgrade	Lucas	3.0	USD	Negotiation	Nov 20
Calder Steel automation	Lucas	2.8	USD	Proposal	Dec 22
Nordhaven Ports retrofit	Ana	2.5	EUR	Verbal award	Dec 18
Brightwell Foods controls	Mei	2.4	USD	Signed PO	Dec 4
Tessin Pharma packaging	Ana	1.9	EUR	Verbal award	Jan 15
Kepler Water SCADA	Mei	1.6	USD	Verbal award	Dec 11

[4] FORECAST POLICY

Commit means a signed purchase order or a verbal award, with a close date inside the quarter. Q4 ends December 31. Report in US dollars at the plan rate: EUR 1 = USD 1.08.

[5] NOTES FROM TWO REPS

Ana: Tessin will probably slip to January. I've also put it in my Q1 number. Lucas: Ferro's procurement team has gone quiet since November 12.