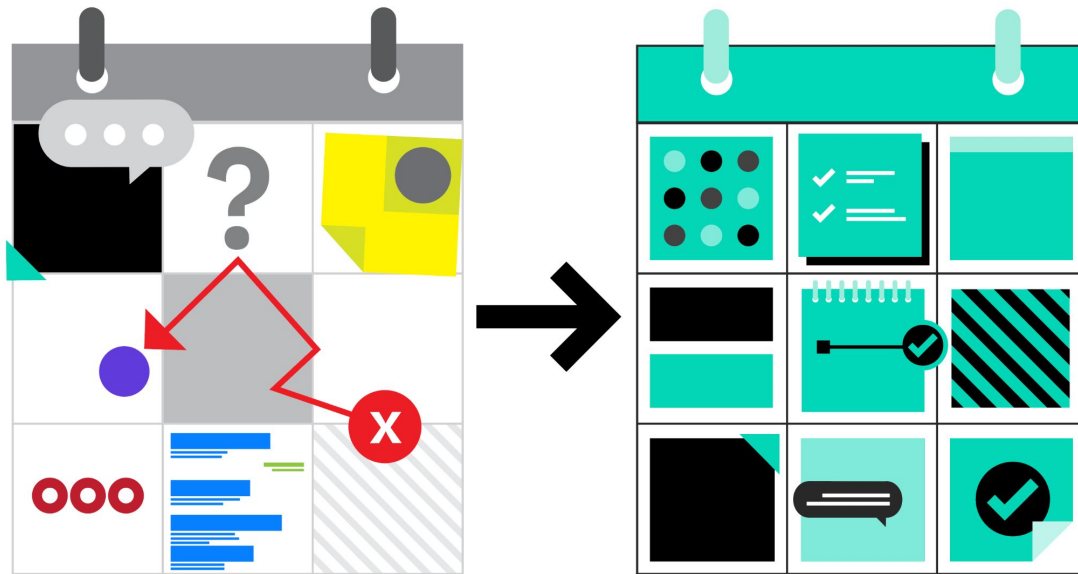


# REVENUE CADENCE PLAYBOOK



## ARE YOU GOING TO MEET, BEAT OR MISS ON REVENUE?

The answer to the most important question in business lies in your Revenue Cadence: the ongoing motion of revenue moments that revenue teams leverage across quarters to deliver predictable, repeatable revenue precision.

As students of revenue ourselves, we're constantly learning from the best revenue orgs in the world. With this revenue cadence playbook, teams at every level of maturity should be able to spot unidentified revenue leak faster and run revenue more predictably and efficiently.

No matter where you are in your journey, Clari is here to help.



## REVENUE MOMENTS

### TEAM PERFORMANCE

- 4 Rep & manager 1:1
- 5 Team weekly meetings
- 6 Sequence of events

### RETENTION & EXPANSION

- 8 Customer QBR / EBR
- 9 Account inspection
- 10 Churn SOE

### FORECAST & ANALYTICS

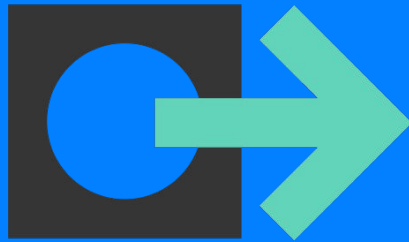
- 12 New logo forecast
- 13 Churn / expansion forecast
- 14 Exec staff & board update
- 15 Funnel analytics
- 16 Quarterly retrospective & model update

### WHAT NEXT

- 18 Cadence rollout recommendations
- 19 Download Clari's cadence checklists
- 20 Running revenue with Clari

# REVENUE MOMENTS

## TEAM PERFORMANCE



- New logo 1:1 & pipeline inspection
- Weekly team meetings
- End of quarter SOE

# REP & MANAGER 1:1

1:1s between reps and managers are criminally underleveraged. They're treated as a means for managers to interrogate their reps about deal health instead of a having a collaborative, strategic discussion about how to create and convert revenue. By focusing on this set of rotating topics, teams are able to capture revenue that would have otherwise leaked.



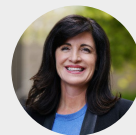
**Dillon Blake**  
VP, Revenue  
Operations at Motus

Week to week, month to month, reps and managers live in Clari. 1:1's are based on a factual and less emotional sales process. We've seen our sales reps collectively gain more confidence in calling their forecast.

FREQUENCY	REVENUE MOMENT	DESCRIPTION	KEY METRICS
Weekly	Prospecting & strategic account penetration	Never let prospecting slip, even if there are lots of in-flight deals. Look at activity metrics, but judge on outcomes and encourage Reps to disqualify bad deals as fast as possible.	Outbound calls, emails, social touches; Accounts touched; Opportunities created; Pipeline created; Pipeline coverage ratio
	In-flight deal review	Make sure rep has qualified the opportunity against your org's qualification framework, not just feelings. Managers should commit to reading the rep's deal notes in advance of the meeting. This avoids wasted time "reporting the news" and shows reps that capturing notes isn't just busy work.	Buyers engaged; Next meeting date; Days in stage; Total deal length
Bi-Weekly (alternate weeks)	Committed deal review	Pressure-test every deal in the commit: what's the steps to close? What's the best and worst cases, any pull forwards to cover potential slips? <i>[Consider running weekly in final month of quarter.]</i>	Total Committed Revenue; Best Case / Most Likely / Worst Case forecasts
	Sales skills review	Review calls together and focus on a specific selling skill like active listening, multithreading, asking for the next yes, establishing a POV etc.	Stage conversion rates; Quota attainment; Sales cycle duration; Win rates; ASP <i>[Compared to peer benchmarks]</i>
Monthly	Career conversations	Every seller needs a career path. Check in once a month to make sure they're moving forward on their own path and that they're satisfied with progress.	Percentile performance across team

# TEAM DEAL REVIEWS

Every team from the Manager's squad up to RVP needs to agree on their numbers and present those numbers up the chain. If the way teams judge deals are different, or if you use different nomenclature, then there's a huge risk of revenue leak. These don't all have to be 60 min meetings. Use your Revenue Platform to capture the facts async and spend your time together focusing on strategy instead of reporting the news.



**Kelly Steckelberg**  
CFO at Zoom

Clari has played an integral role in improving our revenue execution process. The rich data captured helps our direct sales team call their number with more confidence and accuracy.

FREQUENCY	REVENUE MOMENT	DESCRIPTION	KEY METRICS
Bi-Weekly	Committed Deal Review	For a deal to be Committed, the Rep needs to be absolutely certain this deal has everything needed to close. And close on time. Think of this as the regular run up to the <a href="#">SOE meeting</a> .	SOE: Deal value prop; next step; executive engagement; mutual action plan status; open risks; internal asks
	Big Deal Review	Expose major deals to a wider set of leaders in and out of revenue team to maximize odds of winning. The earlier you bring in add'l people, the more likely you'll close. Executive alignment is especially important on large deals.	SOE: Deal value prop; next step; executive engagement; mutual action plan status; open risks; internal asks
Monthly	Slipped Deal Review	"Slipped" refers to deals that had their close date changed from the current Q to a future Q. These reviews solve for two problems – (1) how to make sure the slipped deal doesn't slip again and (2) how to tighten process so that Committed deals close as predicted.	Duration in stage; MAP / process adherence; compelling event; business case customization
	Won Deal Review	Celebrate the win, but also look critically to see if the Rep did anything different that can be replicated: message, use case, new deck, change order of milestones.	Call summaries, business case, MAP milestone customization
	Lost Deal Review	Review major lost deals to see if anything different could have been done, and if deal might be resuscitated if the fundamentals were strong. Check if proper qualification process as applied, and if it was, consider revisiting the qualification criteria to discover why this deal advanced as far as it did.	Stage at Lost; MAP / process adherence; double check stage exit criteria

# SEQUENCE OF EVENTS

An end-of-quarter Sequence of Events (SOE) is a high pressure crucible, but it gets results. Every meeting, each rep is expected to share what the sequence of events is for that deal to close, essentially, who needs to do what. SOE gives the leader an opportunity to pressure test commits and offer insights, is a forcing function for process and stage documentation, and acts as a backstop moment for executives to step in and support critical deals.



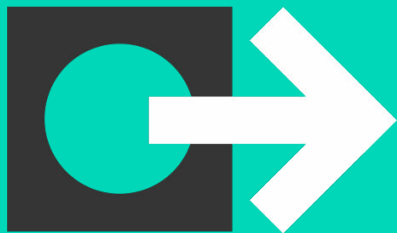
**Greg Donohue**  
VP of Sales  
Kofax

Clari Align [mutual action plans] helps me as a sales leader understand where deals sit in the sales cycle, allowing for a more streamlined deal inspection process and more effective coaching.

FREQUENCY	REVENUE MOMENT	DESCRIPTION	KEY METRICS
<b>Month 1</b> One SOE meeting at the end of the month	<b>Small Team SOE</b>	Front Line Manager (FLM) and their direct reports review the path to close for each open deal set to close in quarter.	<p>You need to know the following on every deal. Include the date it was done and the person who did it</p> <ul style="list-style-type: none"> <li>• Exec Demos Needed?</li> <li>• Presented Proposal?</li> <li>• Who will sign the deal?</li> <li>• Procurement Process?</li> <li>• Legal Review Needed?</li> <li>• Security Review Needed?</li> <li>• Budget Approval by CFO?</li> <li>• Mutually agreed-upon close date?</li> <li>• Commercial Terms Reached (\$/Product/Term)?</li> </ul>
<b>Month 2</b> Biweekly	<b>Small Team SOE</b>	Front Line Manager (FLM) and their direct reports review the path to close for each open deal set to close in quarter	
<b>Month 3</b> Weekly, then M-W-F, then daily in last week	<b>Large Group SOE</b>	Large group format for all reps with a deal closing in quarter. ONLY reps with open deals are invited. As deals are closed, Reps are excused from the meeting until all deals are closed or the quarter ends.	

# REVENUE MOMENTS

## RETENTION & EXPANSION



- Customer QBR / EBR
- Account Inspection
- Churn SOE

# CUSTOMER QBR / EBR

Done right, the Quarterly Business Review and Executive Business Review will prove ongoing value to the customer and give the selling organization an opportunity to realign should customer priorities be shifting. Every minute is precious in these calls, so send a written report in advance so your time together is focused on value and business impact.



**Russ Keefe**  
CFO at Corelight

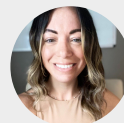
I'm not only in Clari during QBRs and forecasting calls; it's the first tab I open to see how we are trending for net new, renewals, and out quarter pipeline.

FREQUENCY	REVENUE MOMENT	DESCRIPTION	KEY METRICS
Monthly	Account Health Check	This is an internal moment when the Account Manager collaborates with Customer Success team to rate Green / Yellow / Red. For Yellow or Red accounts, don't wait for the QBR. Be proactive and recommend additional enablement, professional services or a different mix of products to get them back on track.	Calculate a "usage per week" statistic that correlates to a positive outcome for the customer. Define your Health Score rubric with your Customer Success Team to reflect value received and likelihood to renew.
Quarterly	Customer QBR	In the QBR, review value delivered against the goals you set in the previous quarter and set new goals for next quarter.  Reserve time to talk about new priorities and recommend additional SKUs or services to help them achieve those priorities.	Usage data; account health status; whitespace / add'l value; customer strategic initiatives
Biannually	Executive Business Review	Earn time with the customer's senior leadership by showing how your partnership is making their strategic initiatives possible. Get a pre-show huddle with your champion so you understand their latest priorities <i>before</i> you make recommendations. Make your champion look smart and everyone wins.	Customer strategic initiatives; progress towards partnership goals enabled by your partnership



# ACCOUNT HEALTH INSPECTION

These critical revenue moments can either be incorporated into a Rep/Manager 1:1 or given their own team meeting. Either way, the minutes will fly by, so practice good async status updates in your Revenue Platform and spend this valuable time together on strategy to move deals forward instead of an interrogation or reporting the news.



**Jeannine Crispino**  
VP, Customer  
Success at 6sense

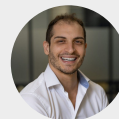
Customer success is central to generating recurring revenue. To drive smooth renewals, we needed the visibility, predictability, and alignment that Clari provides.

FREQUENCY	REVENUE MOMENT	DESCRIPTION	KEY METRICS
Biweekly (alternate weeks)	Current Quarter Renewals	What accounts are at risk of churn? For accounts with partial churn (for example from seat reduction beyond your control), can you make up the difference with new products?	Net dollar retention best/ worst/ most likely; Churn budget vs. forecast to date; MAP status & deal score
	Current Quarter Expansion	Although upsell / cross sell tied to a renewal have a hard date, it's easy for off-cycle deals to slip. Apply the same rigor that you'd apply for new logo deals.	New revenue best/ worst/ most likely; Off cycle vs. on cycle deal value; MAP status & deal score
	Next Quarter Renewals	A full quarter is barely enough time to turn around an at-risk account, so you need to know your early warning signals.	Time in stage; MAP status & deal score
	Next Quarter Expansion	What accounts are green AND have upside? Look for upsell of the current SKUs with different teams and uses cases, and look at cross sell of new products	Seats vs. total headcount; Seat count of each SKU
Monthly	Customer QBR / EBR Prep	Review the QBRs coming up for your book of business a month in advance.	Usage data; account health status; whitespace / Add'l value; Customer strategic initiatives
Quarterly	Book of Business Account Strategies	Present a review of your book of business at the start of the year and craft account plans for your top 10-20% accounts, check in at quarterly and make adjustments as necessary	White space analysis
	Health trends	Did any Green accounts churn last quarter? Your health indicators may be behind the times. Look to see if you need to change your KPIs	Account health; churn actuals

# CHURN MITIGATION SOE

In tougher macro economic conditions, customers may churn entirely, but more likely they'll be looking for places to reduce spend either through reduced seat count or canceling the add-ons they don't use.

Give Churn SOE its own meeting so senior leadership can spot trends earlier and you have time time for product swaps and other ways to maintain spend.



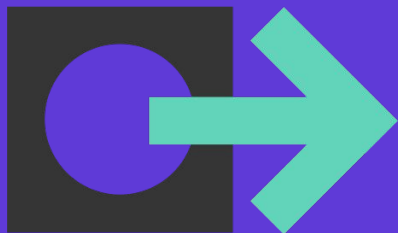
**Alex Marantelos**  
Manager, Customer  
Success at Confluent

Clari has allowed me to have a clearer view of my sales performance. I know how well I am performing and exactly where I need to focus on to meet my targets.

Frequency	Revenue Moment	Description	Key Metrics
Biweekly	Risk Meeting	Meeting with Account Manager, Front Line Manager and leadership from Customer Success team to identify and triage any accounts at risk of churn.	Account health score; renewal date; account value; product usage data
Monthly	Win / Loss Analysis	Celebrate the wins together, especially if the AM used a new approach to close the deal. Look critically at lost deals. Don't accept "gone dark" as a valid reason. Dig deeper: business value or access to power are likely culprits.	Closed-Lost Reason; CI analytics
End of Quarter	Churn SOE	As you get closer to EoQ, focus on the renewals that you're relying on to hit your NDR. Make sure you have an SOE for every renewal, just the same as you do for new logo.	SOE: Deal value prop; next step; executive engagement; mutual action plan status; open risks; internal asks

# REVENUE MOMENTS

## FORECAST & ANALYTICS



- New logo forecast
- Churn / expansion forecast
- CRO call & board meeting
- Funnel analytics
- Quarterly retrospective & model update

# NEW LOGO FORECAST

Senior leadership has the scope to look down at individual deals and up at the broader landscape. Depending on the size of your org, there could be multiple layers of management and roll ups. Leadership should meet on Mondays to game-plan out the week and on Fridays to update your forecasts.



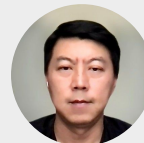
**Mark Parrinello**  
CRO at SentinelOne

CEOs & CFOs want to work with CROs who lead with process, methodology, and data. Be that CRO who can layer intuition with a platform like Clari to deliver forecast projections with accuracy and confidence.

FREQUENCY	REVENUE MOMENT	DESCRIPTION	KEY METRICS
Weekly	Current Quarter	Roll up each FLM's forecast by Commit / Most Likely / Best case / Worst Case. Beware of making decisions on stale data: Make sure everyone is keeping their deals up to date and commit to updating on the same day of the week. If an FLM is overriding their team's forecast, explain why and take notes so you all remember the thinking in later meetings.	Best case; Worst case; Most likely (Call)
	Major deals	Leading indicators are infinitely more valuable than lagging indicators. Always look for risk in major deals even at early stages, checking for relationships, insights and resources that be brought in the moment any risk is spotted.	SOE; Stage progression; MAP Status; Executive Engagement
Bi-Weekly (rotate each week)	Next Quarter	If you rely on in-quarter closes for a large percentage of your revenue, keep close tabs on the early stage deals to give advance notice if your in-quarter funnel is changing.	Best case; Worst case; Most likely; Pipeline coverage (mid-funnel) In Quarter deal value vs. last Quarter / last Year; Current Quarter deals at risk of slip (that may get pushed into Next Quarter);
	2 Quarters Out	Unless you have a very fast sale cycle, you need to be forecasting 2+ quarters out to give the team enough time to change direction if there's a problem.	Best case; Worst case; Most likely; Pipeline coverage (early and MQL incoming)

# CHURN / EXPANSION FORECAST

In a downturn, your existing customers are your lifeline. Treat them with respect and be relentless in looking for expansion opportunities that truly add value for your customer. They already trust you, so decision making is faster.



**Jon Jung** VP of  
Sales Ops and  
Strategy at Zscaler

Clari gives us visibility and rigor across our net new, cross-sell, upsell, and renewal business, making our entire revenue process seamless and predictable.

FREQUENCY	REVENUE MOMENT	DESCRIPTION	KEY METRICS
Weekly	Current Quarter Renewals	Roll up from each team. You should have a churn “budget” to draw down against. Special focus on accounts within 6 months of renewal and for Red and Yellow accounts where renewals are at risk.	Account health, renewal dollar value (best case, worst case, most likely)
	Current Quarter Expansion	Roll up from each team. Special focus on accounts that landed small, on larger companies with a relatively smaller spend, or multi-division accounts where you can replicate success.	Account health, renewal dollar value (best case, worst case, most likely)
Bi-Weekly (rotate each week)	Next Quarter Renewals	If you rely on in-quarter closes for a large percentage of your revenue, keep close tabs on the early stage deals to give advance notice if your in-quarter funnel is changing.	Account health, renewal dollar value (best case, worst case, most likely); Mid-funnel stage coverage
	2 Quarters Out Renewals	How long does it take your team to move to move an account from Red to Green? That’s the BARE minimum for how far ahead to look long ahead of renewals you	Account health, renewal dollar value (best case, worst case, most likely)
	At Risk Accounts	Quantity which major deals are at risk and devise a save strategy. Look for commonalities across red accounts, or any major changes in selling environment that will impact buyers.	Account health, renewal dollar value (best case, worst case, most likely)

# EXEC STAFF & BOARD

AI is getting better, but we still need an accountable human to make a final call and provide insights to what the numbers mean for business. The CRO Call needs to balance predictive analytics against external macro and value judgements on rolled up forecasts to come up with a single number that the rest of the organization can rely on for everything from building up inventory to investing in marketing to making headcount decisions.



**Brian Distelburger**  
Co-Founder at Yext

Public companies need business-wide visibility. That's why we partner with Clari. Now our revenue teams have an accurate pulse on our business, so we can deliver the predictable results our board and shareholders expect

FREQUENCY	REVENUE MOMENT	DESCRIPTION	KEY METRICS
Weekly	Executive Staff Forecast	Roll up the forecasts from your leaders and pressure test until you're confident, then share your Best / Worst/ Most Likely with your company's executive staff every week. Be as accurate as possible and don't hide bad news.	CURRENT QUARTER (by segment or region) New Logo; Net Dollar Retention Best / Worst/ Most Likely
Monthly	Board Flash	There should be no surprises at the actual board meeting. Set expectations with a short note each month reporting performance against plan. Spend more time on risks than accomplishments.	NEXT QUARTER (by segment or region) Pipeline coverage; New Logo; Net Dollar Retention Best / Worst/ Most Likely
Quarterly	Board Meeting	Yes, you need to share results, but the <i>why</i> is more important. Break down KPIs by segment or region to illustrate differences in performance or highlight upcoming risk. After reporting actuals, show pipeline and next quarter forecast. If you're seeing changes in the assumptions powering your financial model, share the trends and what you're changing in response.	TWO QUARTERS OUT (by segment or region) Pipeline coverage; Long range forecast

# FUNNEL ANALYTICS

Understanding stage conversion is one of the biggest unlocks in running revenue and stopping revenue leak. It's one of the few moments where marketing, enablement, revenue excellence, product and sales leadership all converge. Are deals choking from because of product-market fit or pricing? Do specific reps have a skills deficit? Where is your leak?



**Ed Meyercord**  
President & CEO at  
Extreme Networks

Simply put, we have greater visibility and richer information in real time. With Clari, we're able to significantly de-risk our forecast, which creates more predictable revenue, resulting in more value for our shareholders.

FREQUENCY	REVENUE MOMENT	DESCRIPTION	KEY METRICS
Monthly	Trend Check	In dynamic conditions, the ground shifts fast. Use your revenue platform to compare QoQ for key metrics. If close rate, top of funnel or time in stage is changing rapidly the faster you understand the causes, the faster you can adapt.	Current vs. last quarter comparison for Close rate; S0-S1 advancement rate; S0 count & dollar value
Quarterly	Closed-Lost Analysis	Segment your data by team. In early stage, if only some teams have problems, then look at enablement. If everyone is seeing a decline, then Marketing may need to adjust their ICP or MQL criteria. Late stage lost is more expensive. Use CI analysis to dig deeper than the dropdown of closed-lost reasons and spot trends that you can address: lax mid-stage process, lack of mid-late funnel collateral, poor business case or CFO engagement.	Closed lost at stage; Closed-lost reason; Conversation smart summaries; MAP status at close
	Pipeline council	Meet with Demand Gen and Enablement teams and construct a strategy to address weaknesses. Demand can deliver better leads, Revenue teams can run targeted plays, Product can fix friction points, Competitive can improve positioning, Enablement can teach better objection handling. Measure the impact on your KPIs, reporting monthly in Pipeline Council and adjusting as necessary.	Current vs. last quarter comparison for each KPI you identified, but any leading indicators for those KPIs.

# QUARTERLY RETRO

In the Quarterly Retro, the CRO, Business Ops team and Revenue Ops team use actuals to optimize the financial model and adjust the revenue strategy accordingly. In highly dynamic environments, assumptions can change fast, so you need to keep your hand on the pulse.



**Ari Klionsky**  
SVP, Sales  
Operations at Five9

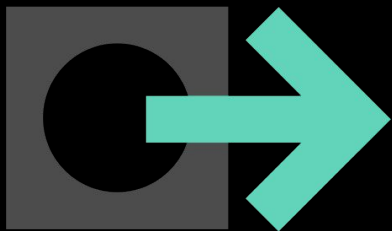
We can now roll-up our number and on a weekly cadence, I can deliver a number and know where it's changed, and if I want to know why it changed I have that as well. It's super simple.

FREQUENCY	REVENUE MOMENT	DESCRIPTION	KEY METRICS
Quarterly	Root Cause Analysis	Dig into opportunity details to understand why assumption(s) are off. Can underperformers be fixed or can you boost any of the other levers enough to compensate? How long will it take to see the impact of any change? What does that mean for your "new normal"?	Usage data ; Account Status
	Assumption vs. Actual	Measure win rate and ASP (average selling price) vs. actuals. Look at a trailing 5 quarters to understand rate of change. What's worst case and when does it hit?	Change over time of Win Rate & ASP by segment
Biannually	Reprioritize KPIs	Pure QoQ growth is good in a 0% interest economy, but in tighter macro, you need to focus more on net dollar retention of customer base, close rate (assuming reduced top of funnel) and COGSs. Make sure the KPIs you report on match the new normal	Customer strategic initiatives; Progress towards partnership goals
	Reset Goals	Given the new normal, is there a path to plan? Reset SDR comp and Marketing goals to drive the new behavior you identified in the RCA. Reset rep attainment / comp plans based on what's attainable or risk a demoralized team who totally flame out and can't even deliver what's possible.	Usage data; Account Status; Whitespace / Add'l value; Customer strategic initiatives



# REVENUE MOMENTS

## WHAT NEXT?



- Cadence rollout recommendations
- Download Clari's cadence checklists
- Running revenue with Clari



# ROLL OUT STRATEGY

Revenue precision is a journey. Start with the most impactful moments (bolded below), then over one or two quarters add more structure as your teams can handle it.

DOWNLOAD: [Cadence Builder Checklist](#)

**CQ:** Current Quarter

**NQ:** Next Quarter

MONTH	WEEK	1:1S & SQUAD MEETINGS	ROLLUP MEETINGS (NEW LOGO & CUSTOMER BUSINESS )	GLOBALS
1	1	<b>CQ New Logo / Churn / Expansion Forecast</b>	<b>CQ Roll-up</b>   QBRs	Revenue Retrospective (all hands)
	2	NQ New Logo / Churn / Expansion Forecast	<b>CQ Roll-up</b>	<b>CRO Staff</b>   Global AE Monthly All Hands
	3	<b>CQ New Logo / Churn / Expansion Forecast</b>	<b>CQ Roll-up</b>   Churn Risk Meeting	<b>Board meeting (CRO only)</b>   Pipeline council
	4	NQ New Logo / Churn / Expansion Forecast	<b>CQ Roll-up</b>	End of Month SOE
2	5	<b>CQ New Logo / Churn / Expansion Forecast</b>	<b>CQ Roll-up</b>   Churn Risk Meeting	
	6	NQ New Logo / Churn / Expansion Forecast	<b>CQ Roll-up</b>	Global Monthly Enablement
	7	<b>CQ New Logo / Churn / Expansion Forecast</b>	<b>CQ Roll-up</b>   Churn Risk Meeting	Pipeline Council
	8	NQ New Logo / Churn / Expansion Forecast	<b>CQ Roll-up</b>	End of Month SOE
3	9	<b>CQ + NQ New Logo / Churn / Expansion Forecast</b>	<b>CQ + NQ Roll-up</b>	
	10	<b>CQ + NQ New Logo / Churn / Expansion Forecast</b>	<b>CQ + NQ Roll-up</b>	Pipeline Council
	11	<b>CQ + NQ New Logo / Churn / Expansion Forecast</b>	<b>CQ + NQ Roll-up</b>	<b>SOE (MWF)</b>
	12	<b>CQ + NQ New Logo / Churn / Expansion Forecast</b>	<b>CQ + NQ Roll-up</b>	<b>SOE (Daily)</b>

# GO DEEPER WITH CLARI'S CADENCE CHECKLISTS

4 PIPELINE INSPECTION

## PIPELINE INSPECTION

No one likes being called out, but as a manager, your job is to spot risk. Have your Revenue Platform up on screen so all the facts are instantly at hand. Push on your reps if you suspect happy run or sandbagging.

PIPELINE ANALYSIS CHECKLIST	FORECAST CHECKLIST
For any big change, what happened?	What is your path to plan?
Overall, was movement good or bad?	What is best / worst / most likely for current quarter?
Do we have good coverage at every stage?	What is best / worst / most likely for next quarter?
See any trends like more slipped deals or lower ACV?	What does pipeline look like for next quarter?
How are we tracking vs last quarter / yr at this time?	Is manager call different than rep's bottom-up forecast?
How many in-quarter deals can we expect to come?	

A Rep and their Manager are an unstoppable force to solve problems and win deals.

Use this checklist to capture the data needed for the forecast while also reserving time for developing your relationship

DOWNLOAD: [Pipeline Inspection Checklist](#)

4 FORECASTING CHECKLIST

## NEXT QUARTER

Next Quarter forecast is focused on pipeline so leaders need to develop expertise in around your early stage pipeline. To spot risk, make sure you run these checklists for your different segments rather than a single roll-up number.

### NQ FORECAST CHECKLIST

Overall pipeline coverage
Current inventory at each stage
Churn budget (forecast) due including account health
Confirm ASP & win rate is consistent with historical trends
What is the value of deals expected to slip into next quarter?
Do in most based on historical trends
Pipeline in Quarter = Win Rate * ASP * Revenue

### QUESTIONS TO ASK

How is the next quarter pipeline looking today compared to the same point in previous quarters?

Any changes in messaging / events / competition?

Any changes in headcount that will impact performance?

Any changes in demand generation budgets?

The forecast is a foundational revenue moment for every member of the revenue team.

Use this checklist to galvanize your forecast, helping reps, managers and senior leadership drive more revenue precision.

DOWNLOAD: [Forecast Checklist](#)

5 CADENCE BUILDER

## BUILD OUT SCHEDULE

Get your meetings of a list and into your calendar

### BUILDER CHECKLIST

Make a copy of the Cadence Builder [template](#)

Fill out Global Meetings List with your scheduled times

For each leader, add their 1:1s and equal team meetings. Check each rep which global meetings they should attend

Builder will show the complete schedule for each leader and calculate the total hours they spend per month in meetings

A cadence has to be grounded in real life. That means dates and times with real people.

Use this checklist and template to define your cadence and then schedule out the required meetings.

DOWNLOAD: [Cadence Builder Checklist](#)

# LEADERS RUN REVENUE WITH CLARI

You've taken the first step towards revenue precision, but to really run revenue – especially in fast changing conditions – you need a Revenue Platform

Take a meeting with us.

We'll help triage your current process and show how your team can recapture the 15% of revenue that you're currently losing to revenue leak.

[Arrange a demo](#)

[See Clari in Action](#)

