

The revenue operations cadence

The Forecast Call

There are critical moments during every week, month, and quarter that define how you generate and accelerate revenue. We refer to these recurring points in time collectively as the connected revenue operations cadence.



1:1 meetings



Weekly team meetings



Forecast calls



Board meeting



QBR

The connected revenue operations cadence — a set of recurring meetings and group forums — can be the backbone of organizational alignment and consistent execution across your go-to-market teams.

At each 1:1 meeting, QBR, pipeline review session or forecast call, there are key questions you need to be able to answer quickly to drive your selling process and close more deals faster. When executed properly, with visibility and accountability across sales, marketing, and customer success, these moments can lead to improved and predictable top-line results—quarter-after-quarter. But, how often do you spend your 1:1 meeting, QBR, or forecast call debating the numbers or chasing down the status of deals instead of strategically discussing a close plan? That's where Clari comes in.

Are you missing your moment?

The forecast call is your moment to call your number with confidence. To do that, you need access to accurate, up-to-the-minute deal data—unfortunately it’s seldom handy when you need it, which means you can’t discern the true health of the pipeline without badgering reps and managers.

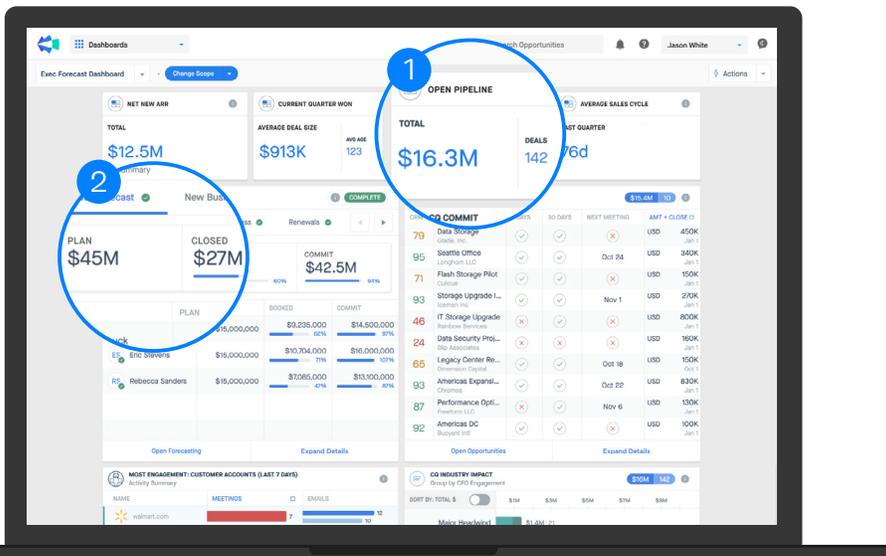
Forecasting is more than just rolling up a number. To quickly identify forecast risk and upside, you need to know how much business your team’s already closed, how many deals are legitimately still in play, and how much pipeline coverage you have. It would also help to know where you stood last quarter at this time, or even last year. We’re talking about two things really: true pipeline visibility, and historical context. Without these you’re only guessing—and you’re missing your moment.

How to run your forecast call in Clari

Clari can be customized to align with how you run your business and forecasting process so you can view, track, or update your predictions and collaborate with your team to drive accuracy. That means you can jettison the spreadsheets and version control, and run your forecast call right from Clari—where you and your team can easily update your number based on real-time deal data, historical trends, and predictive insights.

Step 1. Prep for your call.

To prep for your forecast call, you’ll want to review key performance indicators, and see what your team is calling against the quota.

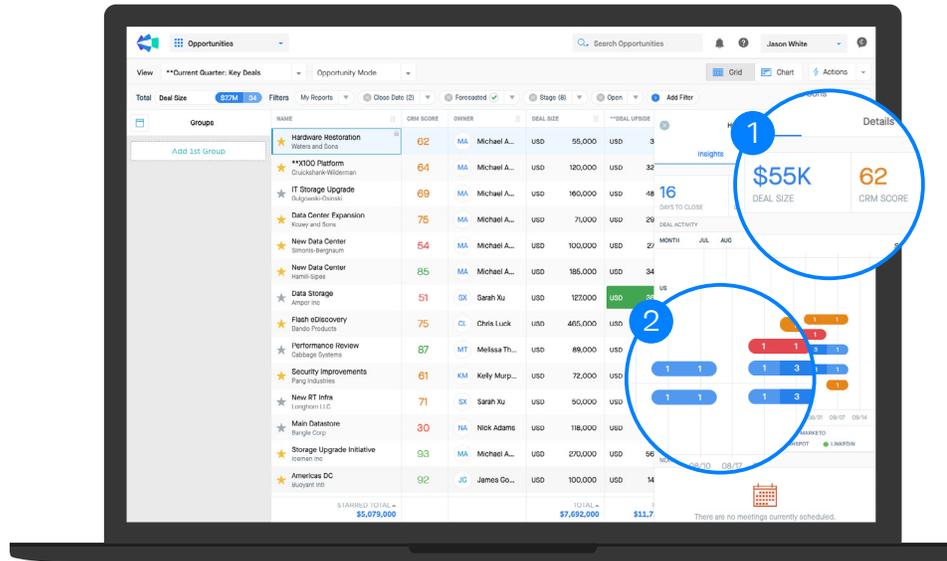


- 1 Review closed deals, open pipeline, deals closing soon, and deals that slipped this week
- 2 See how much business your reps already closed against their quota and what they’re calling in hard commit

Step 2. Take a deeper dive, deal by deal.

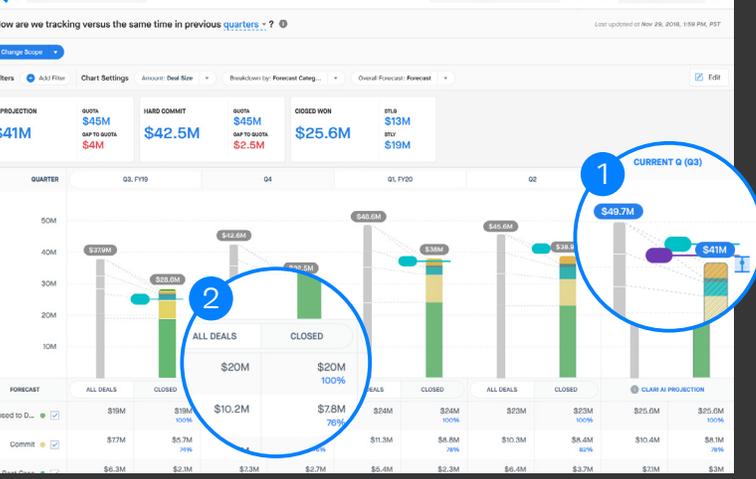
Next, you'll want to zero in on the deals that make up your number to see how they're tracking, and to make sure each has a viable plan to close. With Clari, you can quickly view deals at a glance and examine activity between the rep and the prospect to make sure everybody's still engaged. You can also leverage the AI-based Opportunity Score to gauge how likely it is that key deals will close.

- 1 Leverage the Clari Opportunity Score to determine which deals are at risk and why
- 2 View rep activity and customer engagement data to assess deal health



Step 3. Pressure test your forecast with AI-based predictions.

Now that you have a handle on the status of your deals, you can put them in context. Clari allows you to identify and analyze trends based on historical win rates. You can look at how you're tracking now in comparison to the same time in previous quarters, and then use those insights to inform your strategy and drive better outcomes.



- 1 See Clari's projection against your quota and your team's call
- 2 Compare your current projection trending to previous performance and historical close ratios

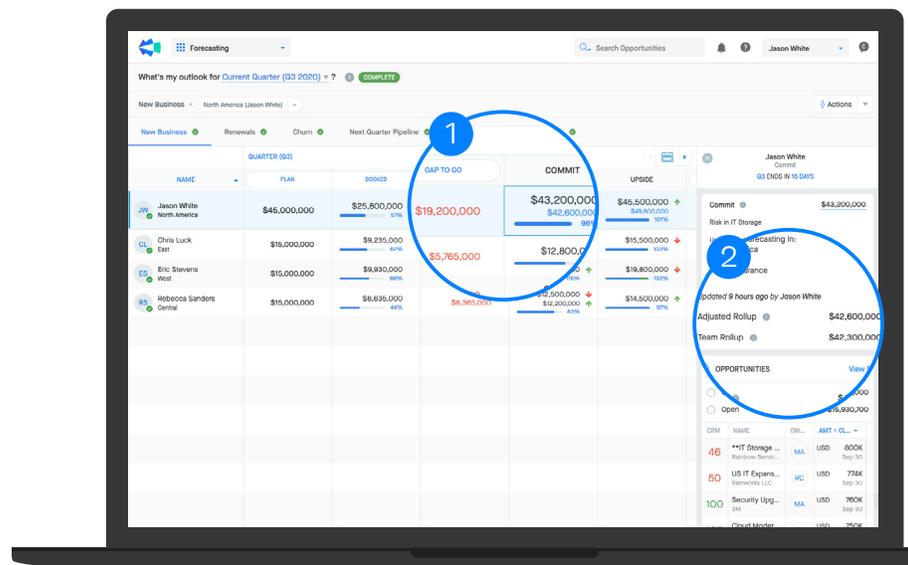
Step 4. Submit your forecast for the week.

Now it's time to share your screen with your team. Go around the room and ask your reps how their week went and what they're calling. You already know from your prep in step 1 who's pulling their weight, who needs more coaching, and who's killing it—and you'll address that further in your 1:1s.

Whether in the office or on your mobile device from the road, you can run your forecast call out of Clari where your team has already submitted their individual forecasts. You now have all the information about what you called last time, what your team is rolling up, how much you've closed so far, and what you have in deals to support that big number in hard commit. You can also see how the forecast has changed over time. In short, you have everything you need to validate your forecast and adjust predictions with confidence.

1 Compare your quota with what you've closed to date. See exactly how a region's forecast evolved over the quarter and who still needs to provide an update

2 Roll up your team's numbers and submit your own forecast



Get real-time visibility and start calling your number [with confidence](#)

[Request a free demo](#) now so you can stop wasting time and start focusing on the deals that matter most.

Carbon Black.

—We've reduced forecast error and consistently land within 5% of Clari's week 2 projection. Predictable results help us take calculated risks with confidence.

Daniel Carpenter
former VP Revenue Excellence



—With Clari, we have experienced a 5x increase in forecast simplicity, speed, and accuracy—in every single region across the globe.

Lou Serlenga
SVP Americas Sales



Clari helps revenue teams streamline operations, improve predictability, and be more efficient by using AI and automation to create full funnel accountability across the entire revenue operation.

For additional information, visit us at clari.com or email us a hello@clari.com