The revenue operations cadence

The Quarterly Business Review

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.

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.

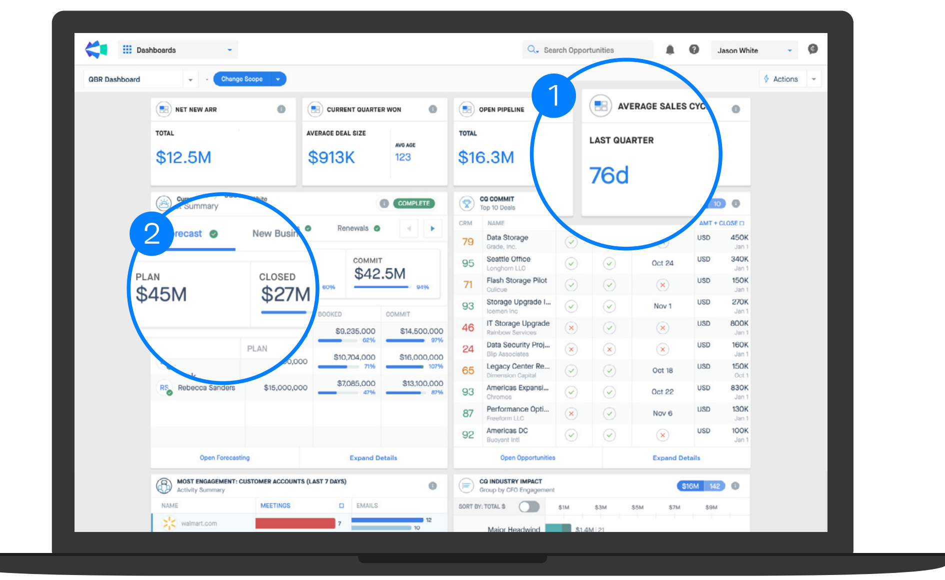
Are you missing your moment?

The Quarterly Business Review (QBR) is your moment to reconnect with reps and assess what worked last quarter, what didn't, and what's next. If prepping for this moment means manually cobbling together stale data from spreadsheets and building out slides—you're wasting your time. And, you'll likely waste even more time in your QBR, because you won't have an accurate read of what really went down last quarter, how it impacts what you're doing today, and what you need to do differently tomorrow. You'll spend your time trying to replay what happened instead of setting up win strategies.

How to run your QBR in Clari

Powered by artificial intelligence, Clari eliminates the blind spots, improves forecast accuracy, and shows the entire sales organization where to focus to close more business, faster.

Step 1. Start with the big picture.
With Clari, you can view key performance indicators in a single, easy-to-configure dashboard, giving you an at-a-glance view of past and future quarters.



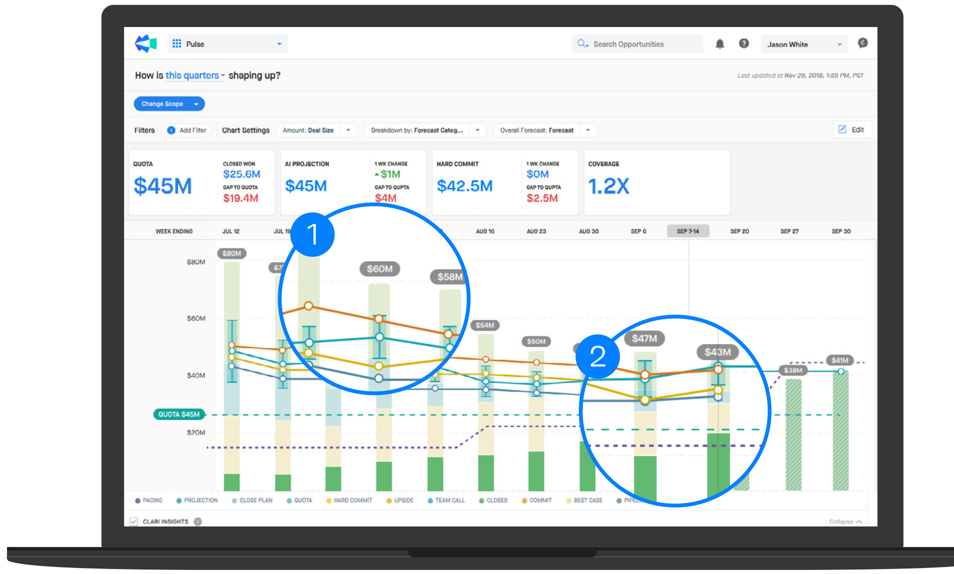
1. Review closed deals, average sales cycle, and slipped deals

2. See how much business your rep already closed against his quota, and what he's calling in hard commit for this quarter

Step 2. Look at your last quarter.

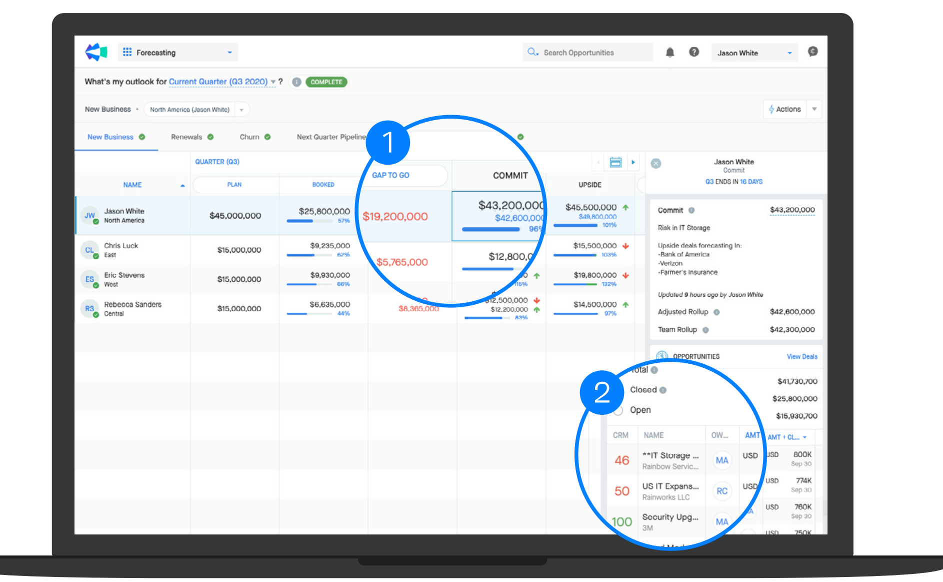
Now you can really drill into last quarter performance; what your sales rep committed, what they closed week over week, and if they hit their quota. You get full visibility into forecast accuracy as well as whether they hit linearity goals for months 1 and 2. And, you can see deal progression throughout the entire quarter, the close ratio of committed deals, and the deals that slipped. This enables you to identify trends, gather insights, and develop strategies for next quarter.

1. See how the pipeline evolved during the quarter against quota
2. See if linearity goals have been met with closed business



Step 3. See what's happening now.

Beyond seeing deals that have already closed, you can inspect the current quarter and review existing pipeline opportunities. You can check to see if you have enough coverage to hit your number, and if you have the right mix of deals—both long-shots and low-risk.



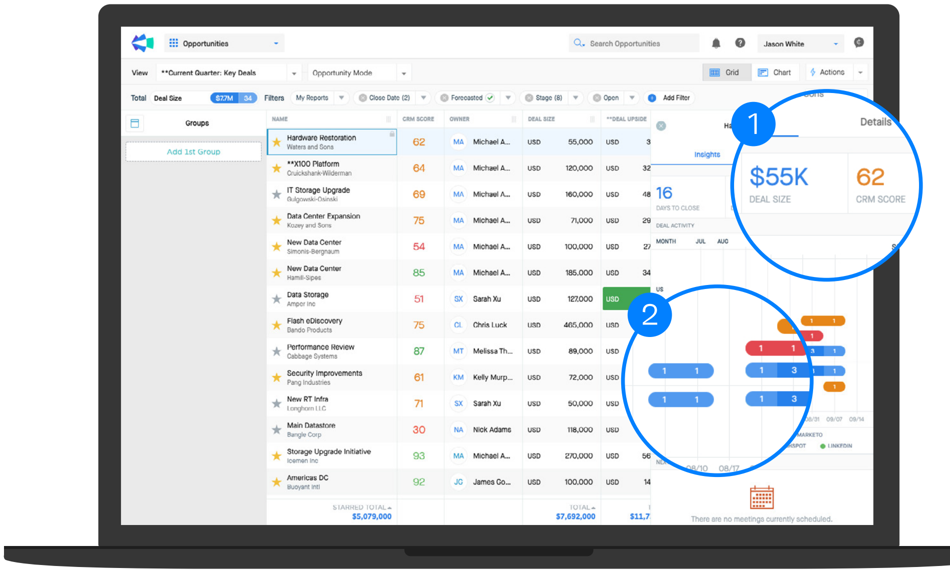
1. Review forecast and see how it compares to the quota and closed business
2. See an accurate view of the deals that back up the forecast

Step 4. Discern what's truly winnable.

Finally, Clari empowers you to identify the key "make-or-break" deals for the current quarter so you can coach your reps to focus on the right opportunities—those most likely to close this quarter. Clari generates an AI driven opportunity score for each deal, assigning a simple 1 - 99 score indicating the overall health of the deal and the likelihood of a successful outcome. Clari also automatically tracks engagement—emails, meetings, and files exchanged—between the rep and prospect, removing the burden on the reps to manually input activity data into the CRM.

In short, you get immediate visibility into the deals that are at risk and those you might be able to pull in to make your number.

1. View Clari Opportunity Score to identify which deals are on track and which are at risk - and why
2. Track rep and customer engagement via email activity, meetings and files going back and forth



Make your next QBR a more valuable interaction for everyone

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

UiPath

—Clari is what we all look at in 1:1s, QBRs, and forecast calls, as it provides the most accurate view of the business - pulling signals not only from CRM but also our email, calendar and even our own customer messaging platform.

Ryan Wilcox
VP Sales Operations

outsystems

—Clari is now front and center at every QBR. From front-line managers to VPs everyone presents in Clari. Having easily accessible data to support a forecast call has made our prior process even better.

Brett Pollacks
CFO