

The Future of Forecasting

Five critical methods every B2B company
should use to forecast their business.

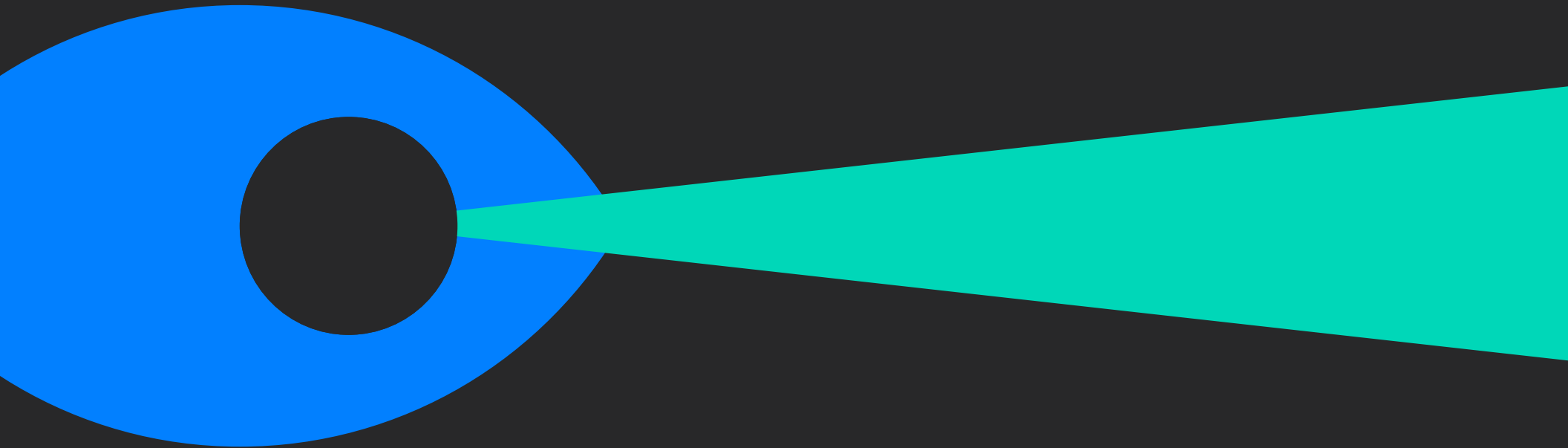


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Introduction

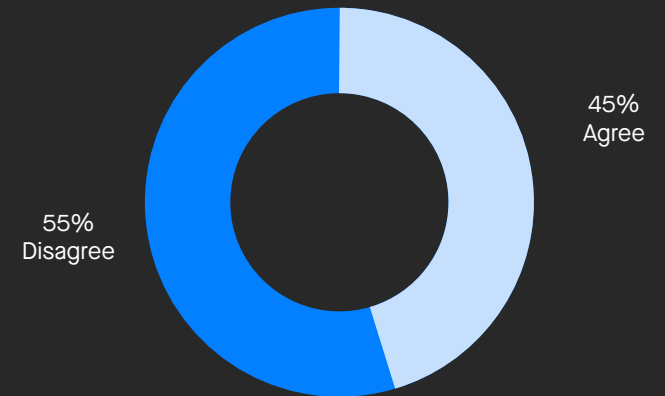
Predicting the weather used to feel a bit like magic. Before radar and satellites, before algorithms that examined past trends to predict future forecasts, people relied on creaking knees or a gut feeling to sense an impending storm.

Forecasting for business used to feel that way, too.

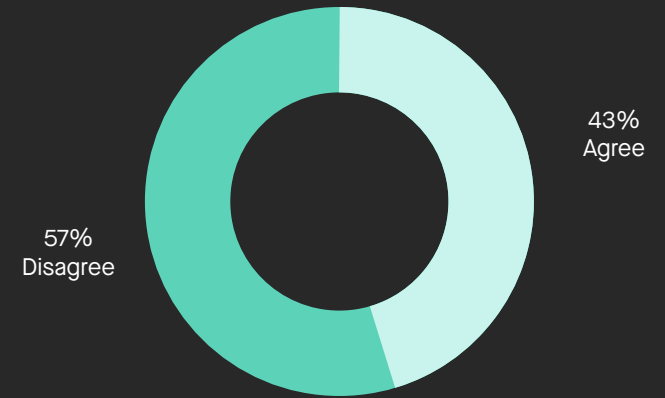
The predictability of the weather has improved greatly over the years. Yet for some, today's sales forecasting still remains a challenge. Revenue teams struggle with stale data, limited visibility, and rigid tools, all of which make accurate forecasting nearly impossible.

Percentage of Respondents Indicating High Confidence in Forecast Accuracy

Sales Leaders Have High Confidence in Forecast Accuracy



Quota-Carrying Sellers Have High Confidence in Forecast Accuracy



55% of sales leaders and 57% of quota-carrying sellers don't have confidence in their forecast.

Clear Skies Ahead

With the right tools, forecasting is seamless. Hyper visibility into your business, teams, territories, and accounts lets you take control of your revenue process and transition from struggling to call the number to leading with predictable revenue.

Clari not only supports traditional forecasting, net-new, and renewals, but also structures like:

- Product Families
- Overlay Models
- Consumption Models
- Opportunity Splits
- Unique Territory Structures
- Account-Based Go-to-Market Strategies

Clari also enables teams to slice and dice their forecast based on any attributes or stage of the customer journey. This level of visibility and analysis allows for a flexible and comprehensive approach that sets up forecasting as the heartbeat of the revenue operation. Forecasting is no longer just about calling the number—it drives strategic initiatives for the entire business.





Introducing [Jason White](#), Chief Revenue Officer.

In this ebook, we share five critical methods every B2B company should use to forecast their business. To illustrate the potential of Forecasting in Clari, we've created the GSS Corporation. GSS is a composite of many of the trends we've seen in our customers at Clari, so you can see exactly how these critical methods play out across a business. Our heroic fictional Chief Revenue Officer is Jason White.

Company Name	Headquarters	Size	Funding	ARR
GSS Corporation	Sunnyvale, CA	~1000 Employees	\$200M Series D	\$150M

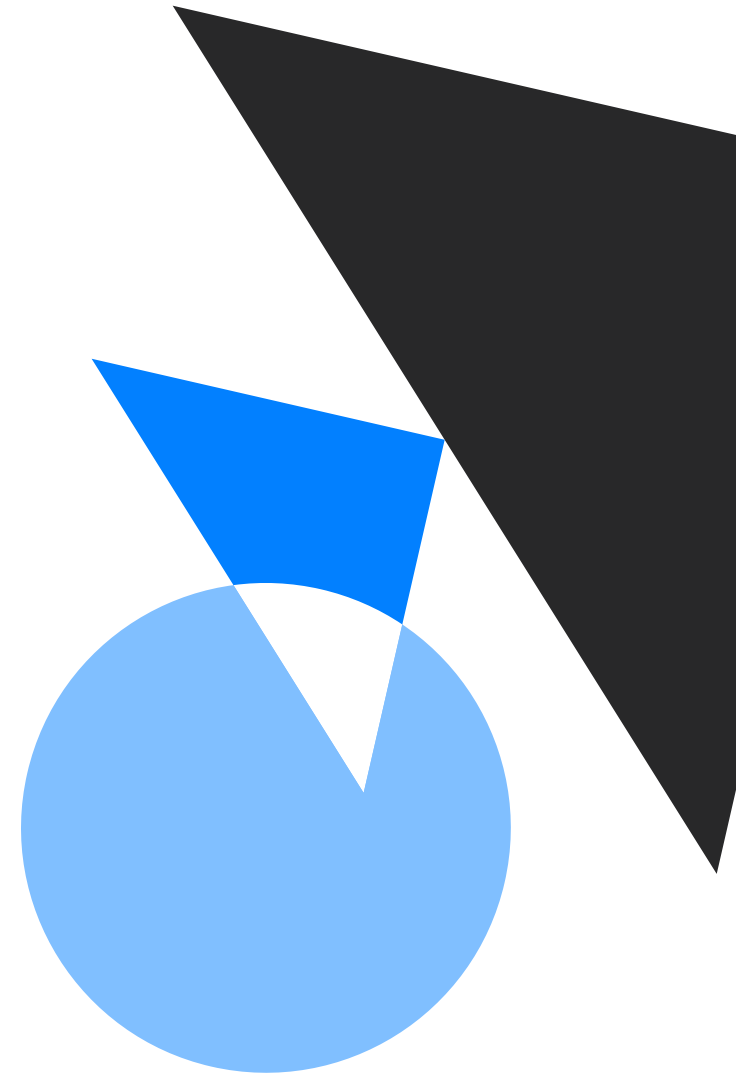
Weathering the Quarter

Can White and GSS Weather the Quarter?

The fourth quarter has arrived. White faces a marathon planning day where he will meet with the sales, marketing, customer success, account management, and finance teams to map out the coming fiscal year. White needs to be in lockstep with his peers in order to deliver on key questions that lead to predictable revenue:

1. [Will you hit or miss your quarter?](#)
2. [Do you have enough pipeline to hit your future goals?](#)
3. [How well is your business driving net retention?](#)
4. [Are you filling whitespace across your accounts and products?](#)
5. [Is your go-to-market strategy working?](#)

The stakes are high for GSS to nail their forecast with extreme precision because they're planning to IPO in a year. Both investors and the street need to know that GSS can hit their number and that the company is on track to succeed.



1. Will you hit or miss your quarter?

Knowing if you will hit or miss the quarter is one of the most basic and most important questions to answer in order to drive predictable revenue. For many CROs, rolling up the forecast is more art than science, and doing so often takes locating siloed data and holding numerous conversations. When the data is off, you're either missing an opportunity to invest in growth or undermining your credibility and investor confidence.

The Importance of Predictable Revenue

When you're **under** the forecast...

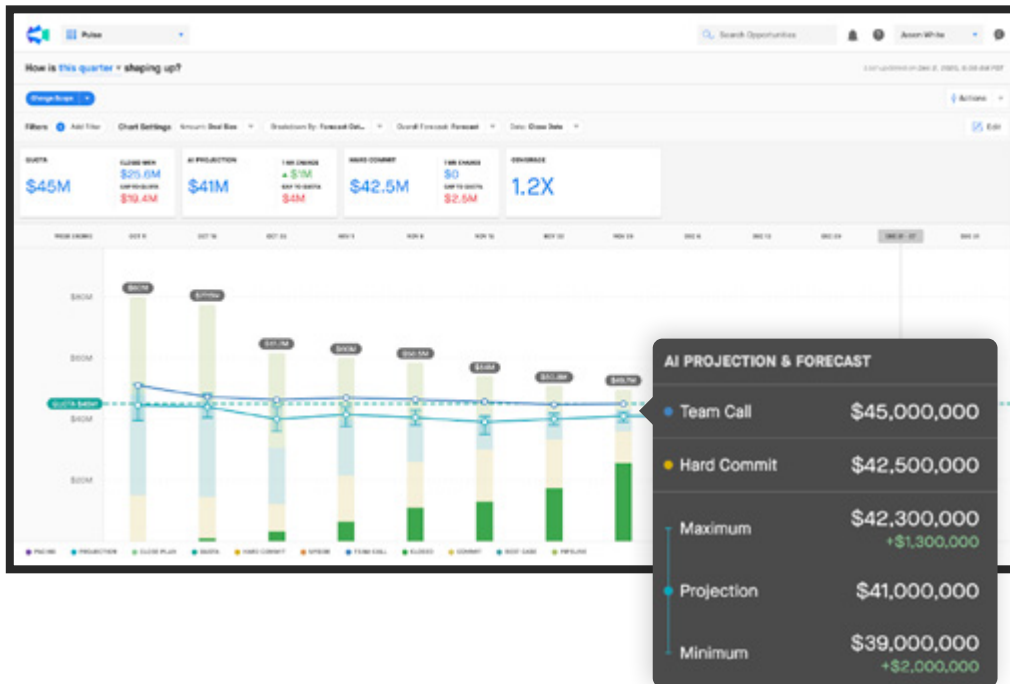
Hard Cost	Soft Cost
<p>Decreased Value/Drop in Stock Price Missed revenue means a decrease in stock and company value.</p>	<p>Investor Confidence Investors wonder if you actually have a pulse on your business, or if you're being reactive impacting future fundraising and autonomy.</p>
<p>Layoffs Instant cash relief through reduction in work force may be necessary, leading to poor morale and costly rehiring in the future.</p>	<p>Executive Team Credibility The board, investors, and customers lose trust in a company leaders for not having an accurate pulse on their business.</p>
<p>Cash Impact Less cash flowing in means reduced hiring programs and investments impacting future fundraising and autonomy.</p>	<p>Employee Morale and Productivity All teams feel a drop in morale by not hitting the forecast, especially sales, resulting in turnover and decrease in productivity.</p>
<p>Missed/Delayed Fundraise Your fundraising story weakens without an accurate forecast, shortening runway and leading to a smaller raise.</p>	<p>Negative Brand Implications Customers and prospect skepticism from customers, partners, and suppliers.</p>

When you're **over** the forecast...

Hard Cost	Soft Cost
<p>Missed Opportunity to Accelerate Operating Plan With greater visibility, you could have proactively taken steps to pull forward key hires or investments.</p>	<p>Executive Team Credibility with the Board The board, investors, and customers lose trust in a company leaders for not having an accurate pulse on their business.</p>
<p>Downstream Crush on Post Sales Departments Teams are underresourced to meet demand, leading to unmet customer needs, overtime costs, and turnover.</p>	<p>Investor Confidence Investors wonder if you actually have a pulse on your business, or if you're being reactive impacting future fundraising and autonomy.</p>
<p>Not Enough Inventory to Meed Needs Inventory was likely purchased based on the forecast, resulting in unfilled orders, expeditation fees, and customer concessions and a hit to customer satisfaction</p>	<p>Premature Increase to Future Quotas Increasing quotas might be a natural reaction, but the results of one quarter could be a false positive if you can't explain the coverage.</p>
<p>Insufficient "Late Spend" Profile Based on accounting rules, unexpected revenue might need to be spent prior to new fiscal periods, resulting in poor spend decisions and dollars wasted.</p>	<p>Deterioration of CRO/CFO Trust Was the CFO in the loop or will they now have to report on a number from left field to the board? The result is stress on internal executive relationships.</p>

Checking the Temperature

White owes his board of directors his commit for the quarter this week. Hitting his forecast is especially important because he is waiting on board approval of the GSS IPO plans. He opens the **Pulse** module in Clari to see how the quarter is tracking. He sees conflicting signals from his direct reports (\$45M) and Clari's data science (\$41M) on where the quarter is going to end. The \$4 million dollar gap is worrying. Based on Clari's Artificial Intelligence, GSS doesn't have an easy path for hitting quota this quarter.



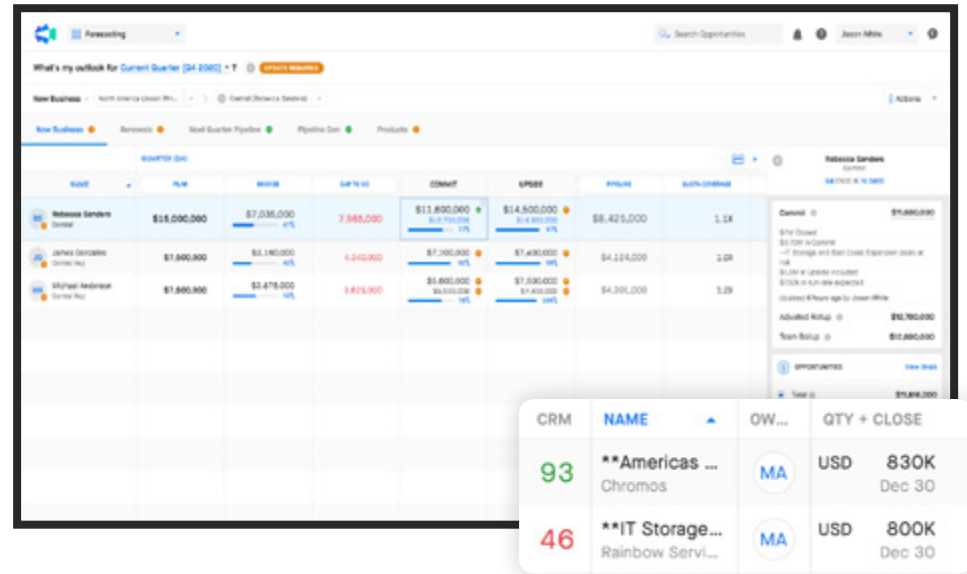
The **Pulse** module allows you to triangulate rolled-up forecasts from your sales team with AI-based projections and your capacity planning, so you have confidence in how your business will perform against the revenue plan.

White plans to track down the source of this discrepancy by meeting with his direct reports to review each of their forecasts and their key open opportunities.

He first meets with Rebecca Sanders, his Enterprise leader, to review her **Forecast** module. Through Clari, he gets real-time visibility into the accuracy of her forecast and how it's rolling up from the team. This simplified and comprehensive view allows White and Sanders to quickly cover the overview and spend more time drilling into the deals that are at risk.

Using the expanded opportunity view, White can review the Enterprise team's deals to really understand where there's risk in her commit and potential upside in earlier stages.

White notices that there is a marked difference between her top two deals, America's Expansion and IT Storage Upgrade.

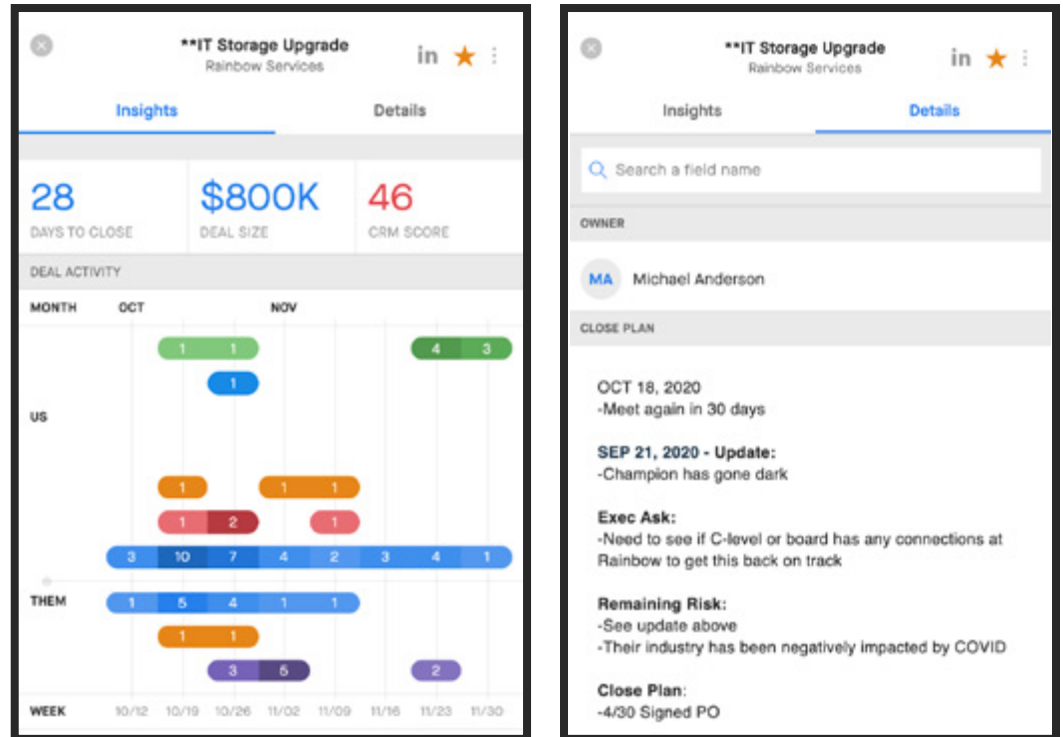


With the **Forecasting** module, revenue leaders forecast in a uniform, integrated and transparent process—for more accuracy and consistency. Call your number based on real-time data and predictive insights—whether you're forecasting your net new business, your product line, or expansions and renewals.

America's Expansion is incredibly healthy. Sanders and White spend just a few seconds on this deal. It has a strong **CRM Score**. Thanks to **Relationship Insights**, White can see that the team has identified the executive buyer and they are multithreaded. White will include this deal in his forecast.

In comparison, IT Storage Upgrade is at risk:

- Low **CRM Score**: 46 out of 100
- No upcoming meetings scheduled
- The close date has moved out by at least 30 days
- The internal champion has gone dark
- The deal is single threaded
- GSS hasn't identified an executive buyer



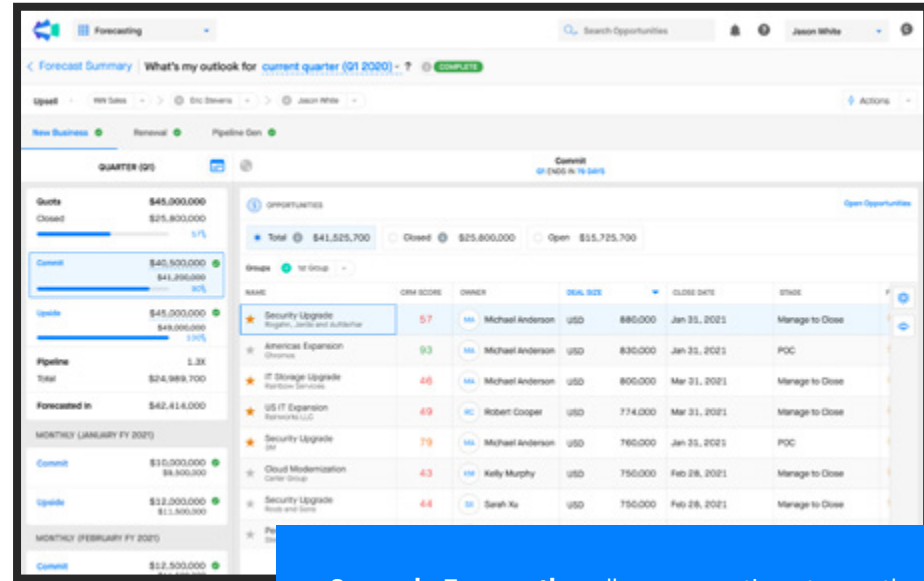
The **CRM Score** examines many factors, including close date, stage, key personas engaged, and length of time in current stage.

Relationship Insights allows users to inspect all of the activity data for a particular opportunity without having to leave the Opportunity tab. You can see data from a variety of sources including, email, calendar, Marketo, Outreach, Highspot and others. White will not include this deal in his forecast for now.

White walks through a similar flow with each of his sales leaders. Based on those conversations, estimates where the business is most likely to close the quarter (\$42.5M) while identifying a path to hit his number (\$45M). To reach his most likely amount, White runs what-if scenarios.

In an expanded view in Clari's **Forecasting** module, he can:

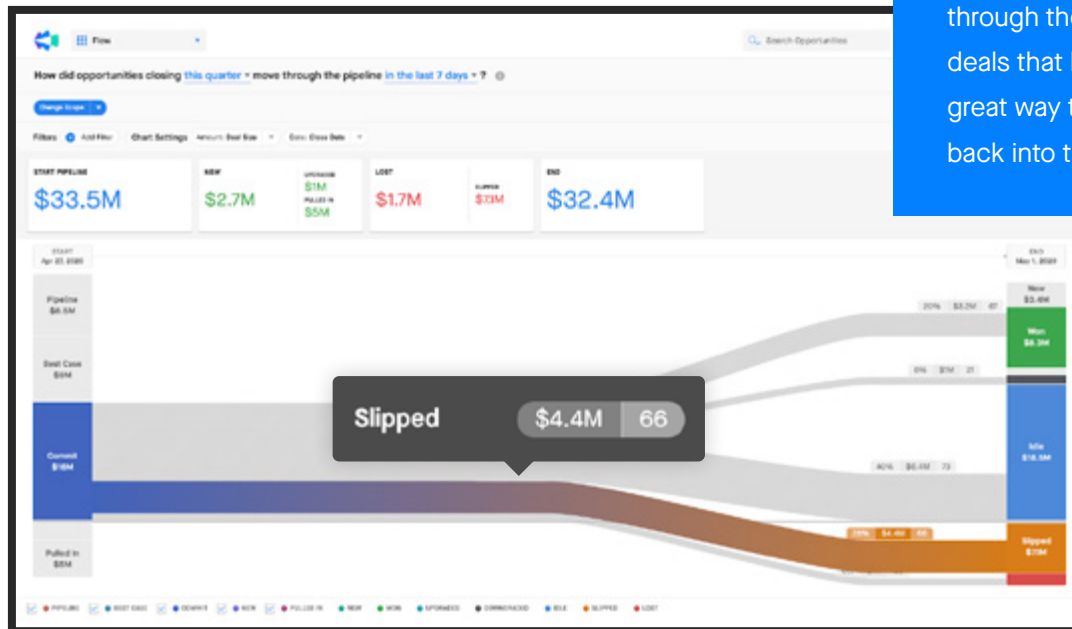
- Pull deals in and out
- Incorporate upside and downside on specific deals
- Evaluate the strength of his path to \$45M using analytics and activity



Scenario Forecasting allows executives to run the numbers for every possible scenario to see the impact on your forecast. Access performance analytics and activity in a single view. Pull deals in and out and update your forecast to see the impact of potential changes.

Finally, White wants to see how his pipeline has changed since his last forecast call. He's worried that a significant amount of committed opportunities have slipped. From the **Flow** module, he can review each of those deals and determine if any can be saved with extra executive attention.

The **Flow** module offers a view into how opportunities that are closing this quarter moved through the pipeline in the last week. Inspecting deals that have moved from commit to slipped is a great way to strategize on how deals may be pulled back into the quarter.



Clari Customer Spotlight

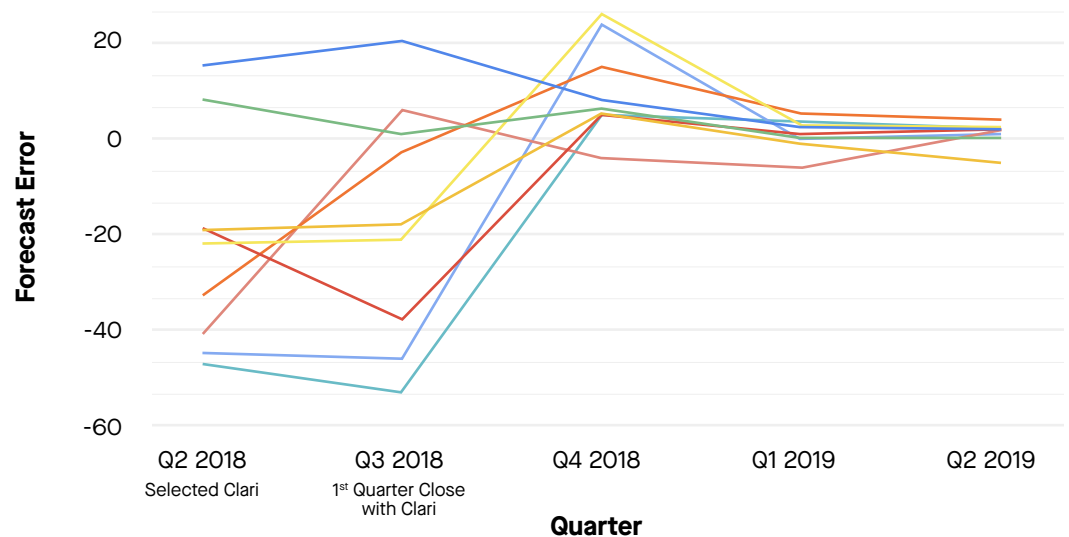
Carbon Black.

— Predictable results with Clari play a big role in our strategy to execute at speed, invest with and grow with confidence.

Dan Carpenter
Former SVP Revenue Excellence & Operations @ Carbon Black

Carbon Black, a leading cloud-based cybersecurity company, brought on Clari to turn static data and siloed processes into a predictable operating rhythm. With teams operating in one process, leaders have a holistic view into pipeline progress and real-time changes. Those insights help teams take action earlier in the quarter to mitigate risk, accelerate opportunity, and deliver results with accuracy and confidence.

Quarterly Forecast Results

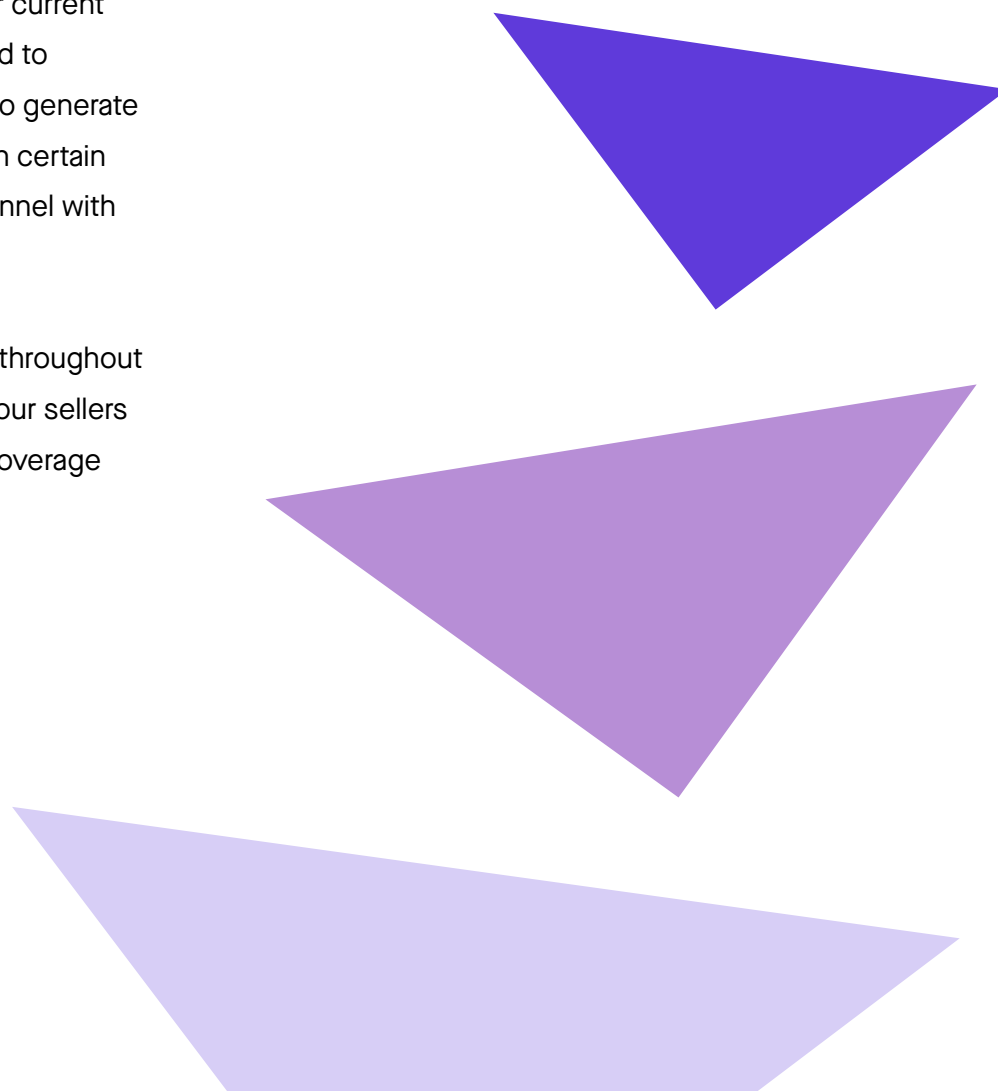


With Clari, Carbon Black moved from one person being within 95% accuracy of their week 2 projection, to today the majority of teams are landing within 95% quarter after quarter.

2. Do you have enough pipeline to hit your future goals?

Pipeline visibility is key to understanding your coverage for current and future quarters, and how much more pipeline you need to develop to make your number. Many companies struggle to generate the pipeline they need. They may have lopsided pipeline in certain verticals, regions, or product lines, or struggle to fill the funnel with the right stage deals to ensure success in future quarters.

Clari gives you total visibility into the state of your pipeline throughout the revenue process. See which accounts and contacts your sellers are engaged with so you know where to deploy more air coverage and deal support.



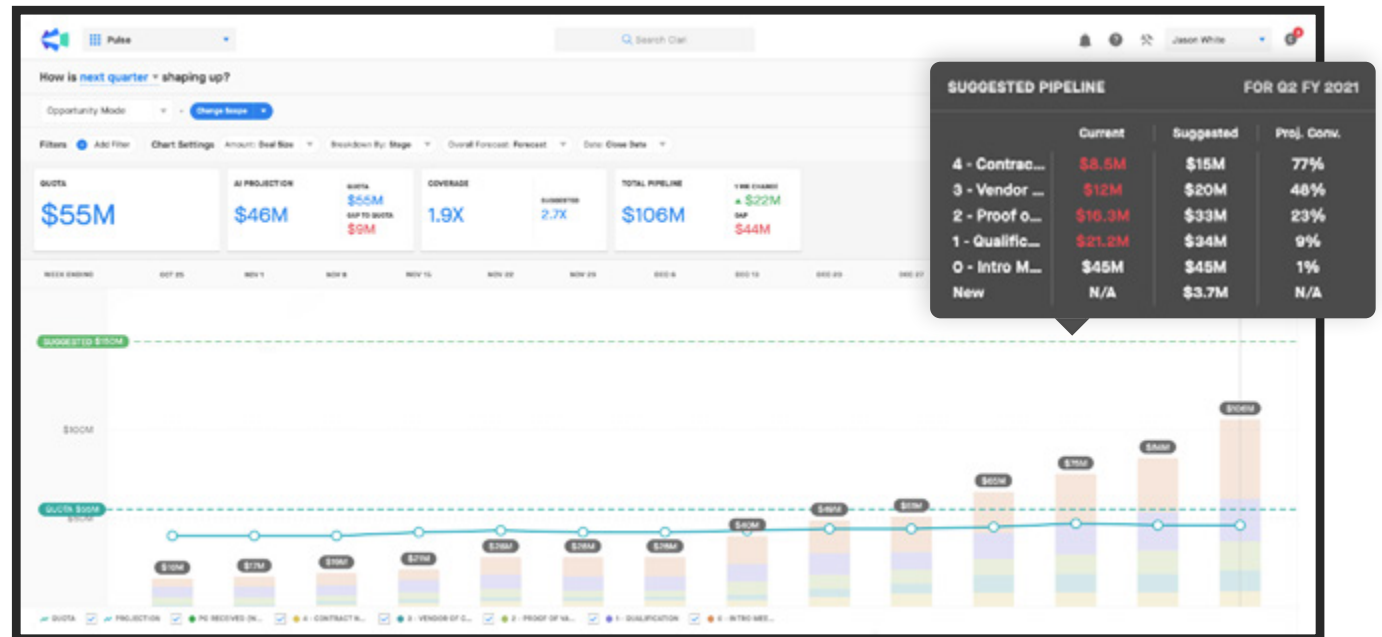
Weather Patterns

White is meeting with the marketing leaders today to discuss next quarter **Pipeline Coverage**. Marketing relies on Clari to determine the coverage needs for the entire region, and for each of White's segments. Clari provides historical and predictive insights to give the team clear insight into where they need to increase pipeline in order to hit their targets.

The GSS team sees significant risk in their ability to hit their number next quarter, both in terms of quantity and quality of pipeline. To understand where and how they need to take specific action, they review each team.

The **Next Quarter Pulse** view will showcase the pipeline generated to date and suggestions on what's needed in order to hit quota based on projected conversion rate.

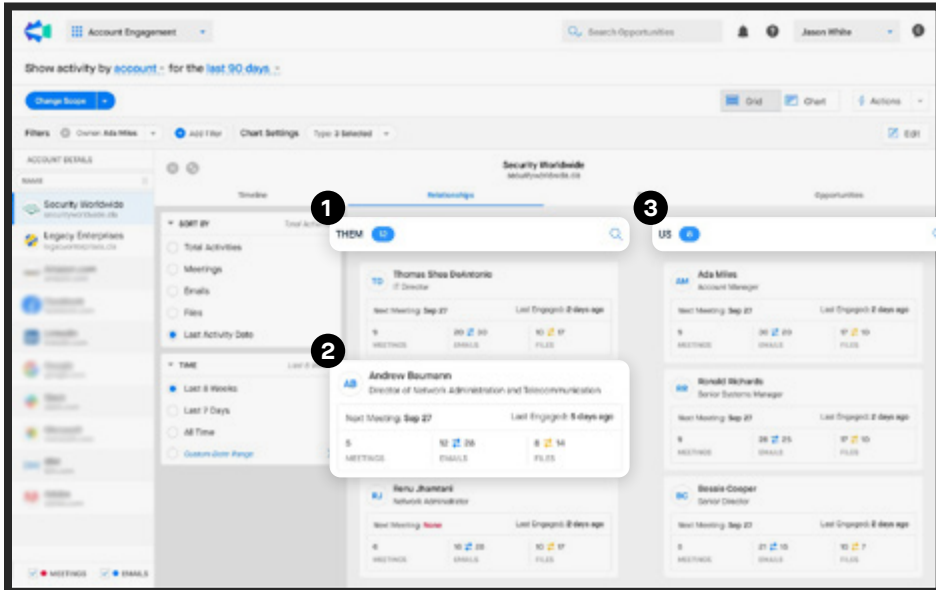
Pipeline Coverage allows you to identify the best way to support and accelerate deals with visibility into activity across target accounts and stalled deals.



Sanders' Enterprise team has significant coverage, but a large portion of her pipeline is early stage and needs to be accelerated. She drills into the **Account Engagement** module to understand where reps are spending their time, which relationships are being built and where there may be gaps that could use extra support from the marketing team.

For example, the Legacy Enterprises opportunity has the IT team engaged and they've done demos with marketing and customer success.

However, with Security Worldwide, the marketing support could clearly help the sales team get multi-threaded, build consensus, and close the deal by end of next quarter. The marketing team will plan to include Security Worldwide, in an upcoming campaign to drive engagement with finance by Starring the deal.



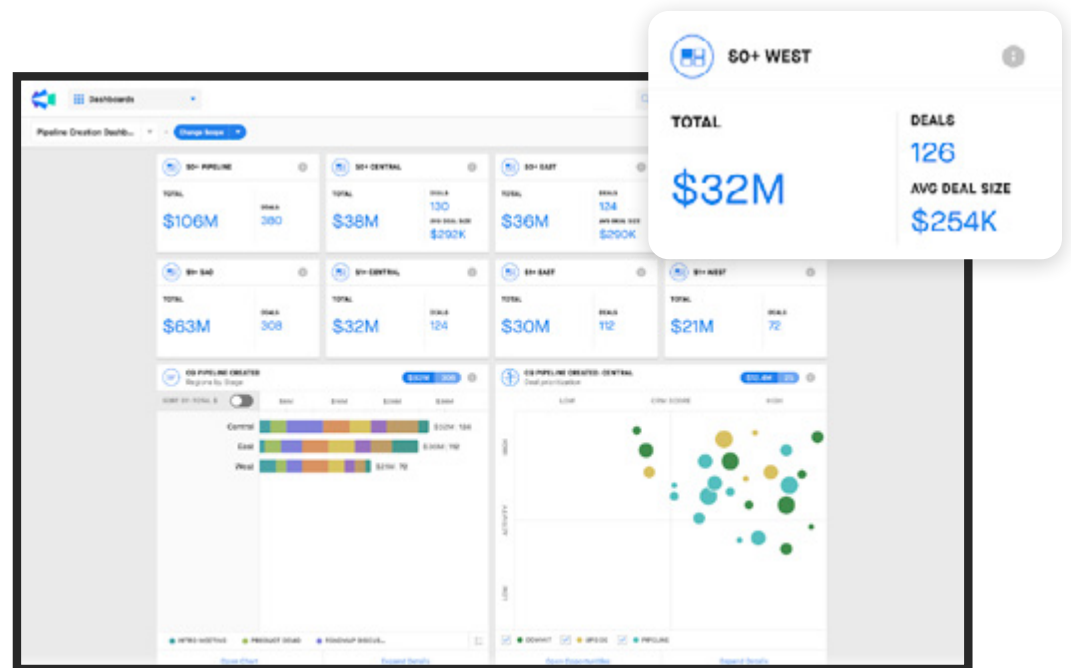
The **Account Engagement** module allows you to track activity on your target accounts and keep your team focused on the right net-new and customer accounts. In this image you can:

- 1) See every engagement with every buyer
- 2) Understand relationship strength and influence in the account
- 3) Identify key internal SMEs / execs not engaged on the account

Star important deals so you can easily track top deals, run analysis, and calculate best/worst case projections based on whether deals are likely to close.

The marketing and sales teams can aggregate all of their information into a single source of truth with the **Dashboard** module. Here, White's teams can monitor how their strategy is working on a daily basis, identify new areas of focus, and build pipeline more effectively.

The numbers show that marketing needs to focus on key accounts in order to hit pipeline goals in the West because while they have a similar number of deals to East and Central markets they have about \$4M less pipeline.



The **Dashboards** module allow your entire team to see the same up-to-the-minute view of your business. They can visualize their pipeline in real time to easily see what deals are moving, stalled, or at risk, so you can align your entire revenue team around a single source of truth.

Clari Customer Spotlight

sumo logic

—When you go public, all your revenue information will soon be under a microscope. Your pipeline inspection needs to be airtight well before the IPO.

Steve Fitz
CRO @ Sumo Logic

Sumo Logic, a Clari customer that went public in 2020, uses Clari to measure business performance throughout the quarter and take action to address gaps or opportunities in the pipeline. Weekly stand-ups with sales and marketing at the executive level, regional, and sub-regional level are run using insights from Clari. Counterparts from different programs conduct a detailed inspection of what's working, what's not, and what's converting at each stage, then create an action plan to strengthen plans.



3. How well is your business driving net retention?

Net Retention is all about protecting the base. Before revenue operations tools like Clari, revenue teams had to base churn on a gut feeling, and faith that your customers like you. Clari offers the visibility you need to identify risk and opportunity in your renewals, forecast churn so you can track your progress against recurring revenue goals, and make sure your team is focused on the right accounts.

In order for Jason White and GSS to hit their growth targets, they need the customer success and account management teams to maintain a 120% net retention supported by a 85% renewal rate. To drive the operational rigor needed to accomplish these goals, the customer success team uses Clari to gain better visibility into their accounts and predictably manage their deals.

Clear Skies Tomorrow

White and the team start their weekly net retention call focusing on some of the biggest renewals at the company. They analyze account health to track week over week progress and focus on the accounts with a red **Account Health Score**, like the renewal for Data Storage, a customer.

Flexible Forecasting allows you to view your forecasting by net new, renewals, churn, next quarter pipeline, and product families.

Account Health Scores allow customer success teams to view their forecast by health score in order to better understand where there is risk in their accounts.

The screenshot displays a forecasting dashboard for the current quarter (Q4 2020). The main table lists accounts with their respective renewal targets, forecasts, and health scores. A detailed view for Jason White's account is shown on the right, including a forecast of \$16,800,000 and a 69% forecasted renewal rate. Below the main table, there are sections for 'OPPORTUNITIES' and 'Data Storage' accounts.

NAME	RENEWALS TARGET	RENEWALS CURRENT	RENEWALS FORECAST	FORGOTTEN RENEWALS	RED RENEWALS	YELLOW RENEWALS	GREEN RENEWALS
JW Jason White North America	\$30,000,000	\$13,895,000 46%	\$26,800,000 \$16,800,000 89%	\$26,800,000	\$2,126,000	\$4,525,000	\$15,995,500
CL CH's Lark East	\$10,000,000	\$6,600,000 66%	\$9,500,000 \$8,500,000 89%	\$9,500,000	\$1,032,000	\$2,243,000	\$6,930,000
ES Eric Stevens West	\$10,000,000	\$2,440,000 24%	\$7,800,000 \$7,800,000 78%	\$7,800,000	\$400,000	\$1,220,000	\$2,460,000
RS Rebecca Sanders Central	\$10,000,000	\$4,665,000 47%	\$9,000,000 \$9,000,000 90%	\$9,000,000	\$694,000	\$1,062,000	\$3,605,500

RENEWALS FORECAST	RENEWALS FORECAST
\$16,800,000	69%

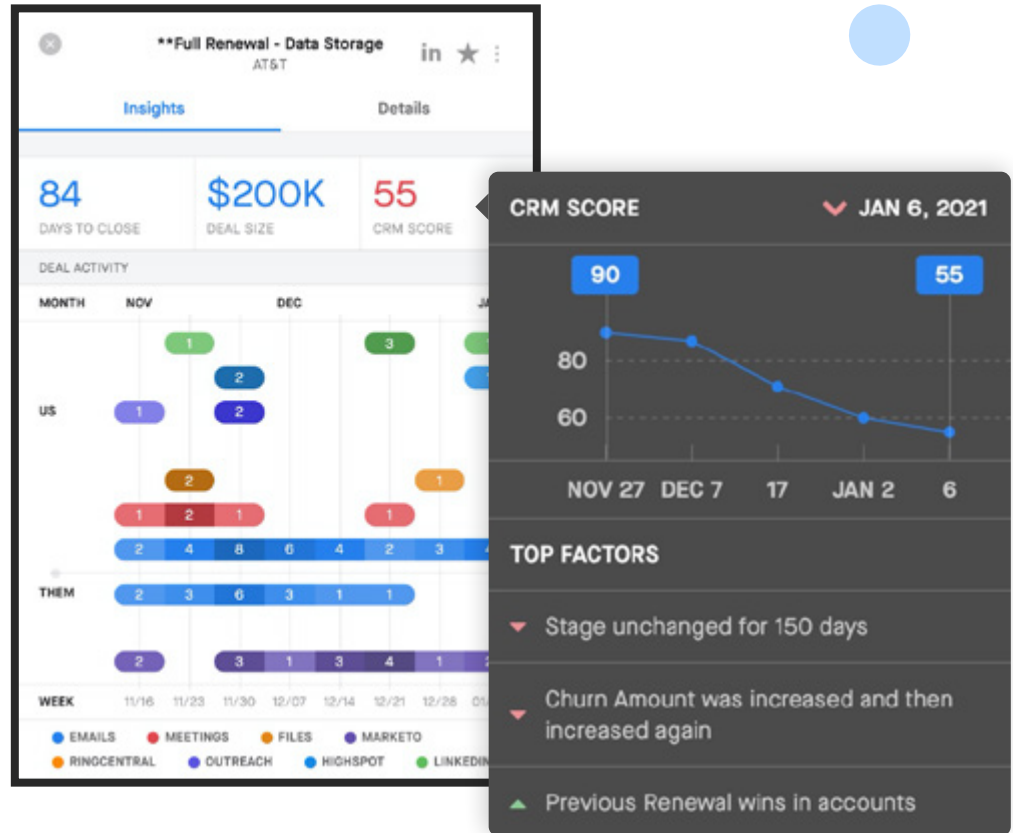
OPPORTUNITIES	View Deals
Total @	\$37,000,000
Closed @	\$13,665,000
Open	\$17,198,000

CM	Account	Est.	SPY + CL
73	Data Storage - ContusLabs	USD	263K Dec 31
77	Data Storage - Galcom	USD	210K Dec 31

Clari pulls in data that tracks adoption and usage trends, so everything is displayed in the details section of account opportunity. This way the team has a 360-degree view of the customer and the team can comprehensively manage their renewals and forecast them with greater accuracy.

As the team discusses the renewal for Data Storage, they notice that executive engagement should be higher this close to a renewal. The lack of engagement indicates the deal is less likely to close.

To save this account, White's team needs to identify and engage with the executive buyer.



Scenario Forecasting

Once the team has reviewed some of the deals at risk, they shift to review their forecast against their plan. The team is on pace to exceed their renewal target for the quarter, with a 90% renewal rate forecasted for the North American region. However, Eric Stevens, Account Manager for the West, forecasts more churn than their goal for the quarter, at 78% dragging down the overall renewal rate for the business. The team agrees on additional review to identify the trends that may impact future performance.

As they review the growth revenue in their install base, the team sees that although Stevens' renewal rate is lower than expected, his team is effectively driving growth in their healthy accounts, with him landing at 123% of goal. That offsets a higher level of churn in other accounts. According to Clari, the team appears to be on track to exceed their net retention forecast for the quarter. Forecasted net retention is an example of an **Adaptive Revenue Metric**.

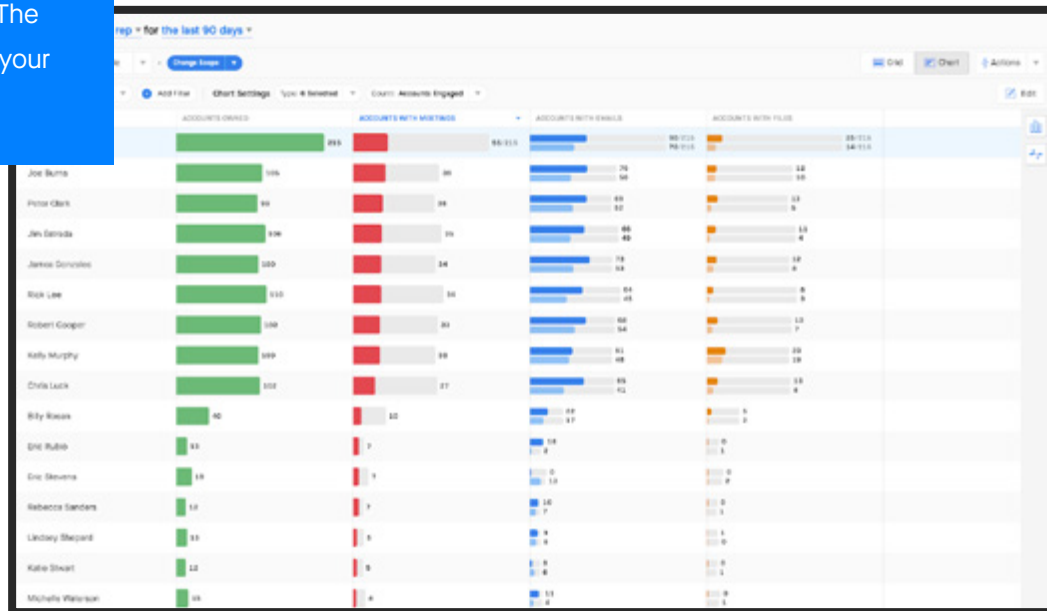
QUARTER (Q4)								
NAME	RENEWALS TARGET	RENEWALS CLOSED	RENEWALS FORECAST	FORECASTED RENEWA...	UPSELL TARGET	UPSELL CLOSED	UPSELL FORECAST	FORECASTED NET RET...
JW Jason White North America	\$30,000,000	\$13,695,000 46%	\$26,800,000 \$26,300,000	89% \$26,800,000	\$11,000,000	\$9,460,000 86%	\$11,500,000 \$7,400,000	128% \$38,300,000
CL Chris Luck East	\$10,000,000	\$6,600,000 66%	\$9,500,000	95% \$9,500,000	\$7,500,000	\$6,000,000 80%	\$1,300,000	108% \$10,800,000
ES Eric Stevens West	\$10,000,000	\$2,440,000 24%	\$7,800,000	78% \$7,800,000	\$3,000,000	\$2,000,000 67%	\$4,500,000	123% \$12,300,000
RS Rebecca Sanders Central	\$10,000,000	\$4,655,000 47%	\$9,000,000					

Adaptive Revenue Metrics allow revenue teams to dynamically inspect and analyze their business by focusing on the revenue health metrics that matter most, so they can identify risk and act on opportunity with confidence.

Following the renewal meeting, White and Stevens discuss their customer base, reviewing all of their accounts and the activity of the teams supporting those accounts. Clari's **Account Engagement** helps them see how well the teams have covered their account base over the past 90 days while comparing that information against account health information aggregated from outside sources to get a sense of where additional attention is needed. This data also helps White and Stevens understand which team members have the largest gaps in coverage and might need additional coaching and support.

To ensure they reduce churn risk for next quarter, the two leaders create a list of accounts with renewals coming due, and plan how to revitalize those accounts.

Account Engagement allows you to view your data by account, opportunity or by rep. The rep chart view allows you to benchmark your reps against their account coverage.



Clari Customer Spotlight



—Clari makes understanding our business effortless, from new logo opportunities to upsell opportunities with existing customers. Greater visibility and rich real-time information allow us to collaborate in new ways to drive net dollar retention and expansion.

Ed Meyercord
President and CEO @ Extreme Network

Extreme Networks uses insights from Clari to understand which revenue streams are performing well, and which might need a different engagement strategy.



4. Are you filling whitespace across your accounts and products?

Understanding your cross-sell and upsell opportunities is critical to taking charge of your forecast across accounts. For many companies, whitespace is something that has to be manually tracked on an account by account basis. Clari allows you to quickly identify key accounts that are the lowest hanging fruit for cross-sell and upsell opportunities.

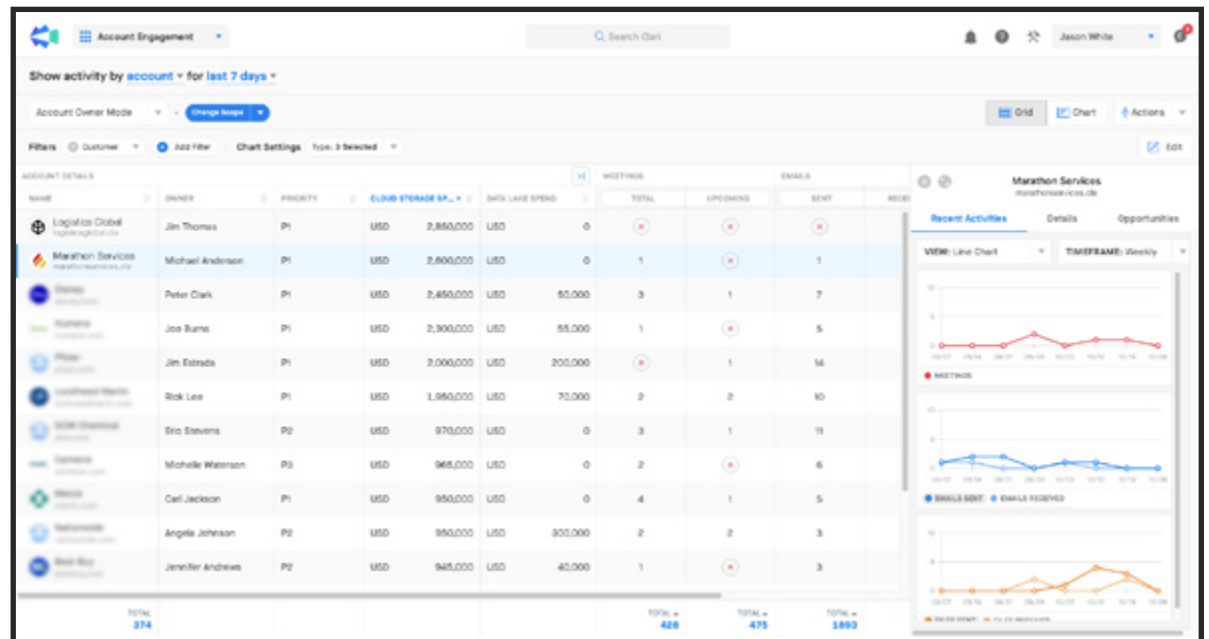
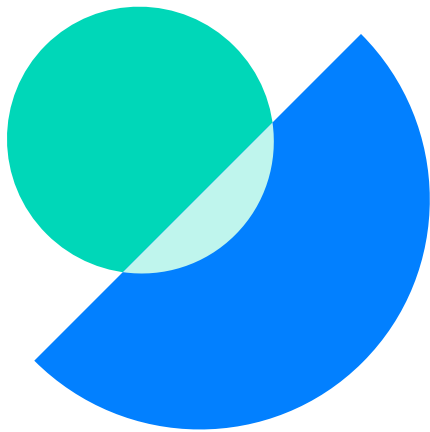
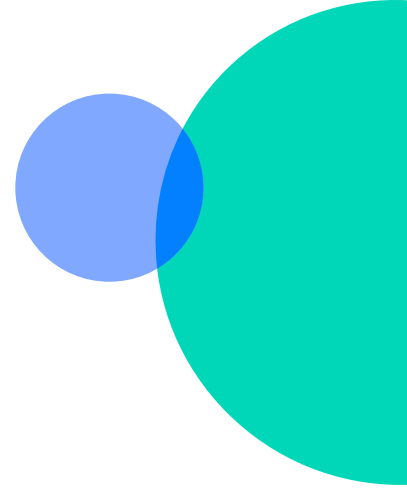
GSS's executive team can track how well the new product is being brought to their customer base, executing on these deals and predictably forecasting for their board. To do this, Jason White and the account management team need to identify which accounts to target, how they manage their new selling motion, and forecast the new product GSS introduced to the market—the GS Data Lake. They perform product **Whitespace Analysis**.

Product **Whitespace Analysis** allows you to track which accounts have additional opportunities with a view into whitespace across accounts. Easily spot opportunities for additional penetration and expansion.

The sales team starts with their account view in Clari, where they can track whitespace in their account base and identify the lowest hanging fruit for cross-sell.

For example, they want to target customer accounts that have the highest propensity for a successful cross-sell opportunity. For GSS, this would be customers that have spent a high amount on their Cloud Storage product, and approach those accounts about the new Data Lake capabilities.

For instance, the team should be targeting customers like Logistics Global and Marathon Services, two customers that are great candidates for the Data Lake product - and currently do not have upcoming meetings scheduled.



As the revenue team's efforts translate into pipeline, Clari provides organization-wide, real-time visibility into how well these deals are progressing. The GSS team has been engaged with a new persona, from the IT team, frequently in deals. With **Clari Autocapture**, everyone is automatically associated with opportunities so marketing and enablement teams can track trends, and use the data to sell more effectively. **Clearbit for Clari** even adds information like title, function, and seniority to make the data even more useful.

Since IT is the target persona of this new product, Autocapture ensures that all IT contacts from previous sales cycles are in the system so that the marketing team can include them in future campaigns.

The screenshot displays the Clari Autocapture interface. At the top, there are navigation elements like 'Autocapture' and 'Search Opportunities'. Below this, a summary bar shows 'NEW CONTACTS ADDED: 501', 'LEADS CONVERTED: 51', 'CONTACTS RE-ADDED: 605', and 'OPPORTUNITIES: 0'. A 'RECENT CONTACT CHANGES' chart is also visible. The main part of the interface is a table with columns for 'FIRST NAME', 'LAST NAME', 'EMAIL ADDRESS', 'ACCOUNT NAME', 'OPPORTUNITY', 'ACTIVITY TIME', 'PREVIOUS TIME', and 'STATUS'. A dropdown menu is open over the 'TITLE' column, listing various job titles such as 'IT Project Manager', 'IT Manager', 'CIO', and 'Engineering Manager'.

FIRST NAME	LAST NAME	EMAIL ADDRESS	ACCOUNT NAME	OPPORTUNITY	ACTIVITY TIME	PREVIOUS TIME	STATUS
Charles	Wilson	char@wilson.com	Physical Financial	Data Storage Renewal	Apr 25, 2020 12:00	Apr 23, 2020 12:00	New Contact Sync Co
Robert	Williams	rob@williams.com	General Motors	Security Renewal	Apr 18, 2020 11:00	Apr 18, 2020 11:00	New Contact Sync Co
Michael	Jones	michael@jones.com	Autobay Automotive Group	Data Storage	Apr 4, 2020 11:00	Apr 23, 2020 11:00	New Contact Sync Co
Jason	Lee	jason@lee.com	Neuro	IT Storage Renewal	Apr 12, 2020 12:00	Apr 23, 2020 12:00	New Contact Sync Co
James	Smith	james@smith.com	United Health Group	Data Storage	Apr 25, 2020 12:00	Apr 23, 2020 12:00	New Contact Sync Co
David	Clark	david@clark.com	FBC Financial Services Co.	Data Storage Renewal	Apr 17, 2020 11:00	Apr 23, 2020 11:00	New Contact Sync Co
Brian	Robinson	brian@robinson.com	Community Health Systems	Platform Renewal	Apr 14, 2020 11:00	Apr 23, 2020 11:00	New Contact Sync Co
George	Martin	george@martin.com	Aflac	IT Storage Renewal	Apr 15, 2020 11:00	Apr 23, 2020 11:00	New Contact Sync Co
Donald	Harris	donald@harris.com	General Dynamics	Data Storage	Apr 4, 2020 11:00	Apr 23, 2020 11:00	New Contact Sync Co
David	Scott	david@scott.com	UPS	Security Renewal	Apr 25, 2020 12:00	Apr 23, 2020 12:00	New Contact Sync Co
Mark	Lee	mark@lee.com	United Way	Security Renewal	Apr 21, 2020 11:00	Apr 23, 2020 11:00	New Contact Sync Co
Paul	Jackson	paul@jackson.com	Nike	License Renewal	Apr 15, 2020 11:00	Apr 23, 2020 11:00	New Contact Sync Co

The **Autocapture** module automatically gathers all of your sales and activity data, giving you visibility into who is involved in deals and driving better sales and marketing alignment.

Clearbit for Clari allows you to automatically flag which deals have involvement from a key decision maker and build reporting on it that doesn't rely on reps manually updating a field on the opportunity.

Adaptive Forecasting includes a product mode forecast, which uses data and Clari AI to showcase growth forecasts for specific products. White's team is executing well and forecasting above their number for the quarter—with strong performance in Enterprise, and lagging performance in SMB. This aligns with the team's expectations.

New Business ● Renewals ● Churn ● Next Quarter Pipeline ● Pipeline Gen ● <u>Products</u> ●							
QUARTER (Q1)							
NAME	PLAN	BOOKED	GAP TO GO	TOTAL FORECAST	GS COMPUTE	GS CLOUD STORAGE	GS NETWORKING
JW Jason White North America	\$45,000,000	\$25,820,000 57%	19,180,000	\$42,500,000 \$40,200,000	\$15,000,000 \$13,750,000	\$11,000,000 \$9,950,000	\$10,500,000 \$9,700,000
CL Chris Luck East	\$15,000,000	\$9,235,000 62%	5,765,000	\$13,000,000	\$3,500,000	\$4,200,000	\$4,500,000
ES Eric Stevens West	\$15,000,000	\$9,955,000 66%	5,045,000	\$14,950,000	\$7,500,000	\$3,250,000	\$2,200,000
RS Rebecca Sanders Central	\$15,000,000	\$6,630,000 44%	8,370,000				

Adaptive Forecasting allows you to slice and dice your forecast by any attribute, including segment, product, and time-period, to understand your business and take the right actions to ensure you're investing in the right opportunities.

Clari Customer Spotlight



—Clari gives me the real-time visibility I need into how we are tracking for the quarter without interrogating our sales team. The forecast, pipeline, and potential slips are right at my fingertips.

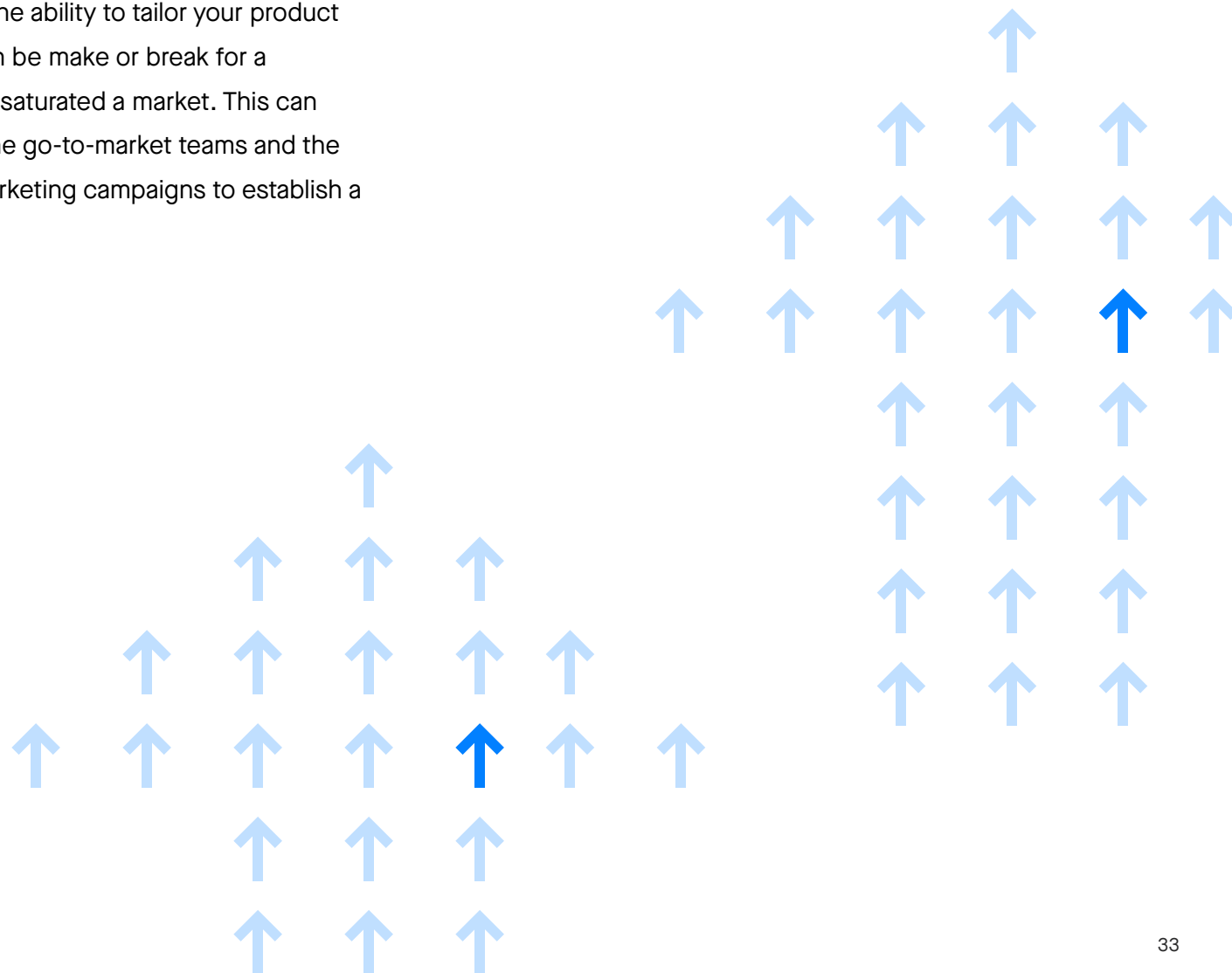
Anup Singh
CFO @ Illumio

For a hyper-growth security company like **Illumio**, the ability to capture and analyze a high volume of incoming business is critical. With Clari, Illumio now captures critical buyer contacts across a large set of fast moving deal inventory that provide insights into buyer intent, deal health, and potential risk.



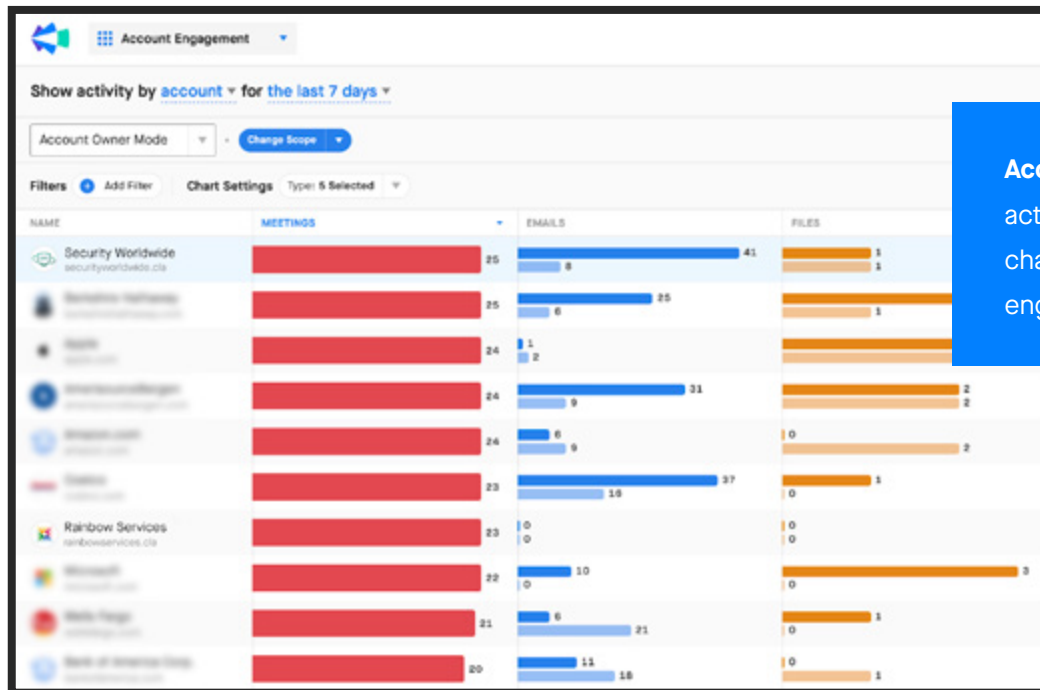
5. Is your go-to-market strategy working?

Moving upmarket or downmarket are strategic decisions for a business in order to expand their addressable market. The ability to tailor your product or services to multiple market segments can be make or break for a business that is high growth but has mostly saturated a market. This can be challenging to do without alignment of the go-to-market teams and the support of finance in funding substantial marketing campaigns to establish a presence in the new market tier.



Moving upmarket is a key strategy for the future success of GSS. Jason White uses Clari to align his entire revenue team, ensuring that the sales, marketing, finance, and customer success teams are all aligned around the upmarket strategy.

GSS has invested heavily in account based marketing around a select number of Enterprise prospect accounts, their Priority 1 accounts. The sales and marketing teams meet to review how well they are gaining traction to date. Thanks to Clari's Account Engagement chart view, they gain clear visibility into where the strategy is working with Security Worldwide and which reps aren't gaining traction with Rainbow Services. Activity data is critical to measuring success of your upmarket strategy because engagement with key accounts is an early indicator of success.



Account Engagement allows you to view your activity data by account or rep. The account chart view allows you to inspect activity and engagement across individual accounts.

Pivoting over to the account engagement grid view, they can see which accounts have successfully generated pipeline from the teams combined efforts. They spend most of their time discussing where sales is investing time to break into accounts like Flash Co., in the considering stage, and discuss how marketing can provide additional support. Security Worldwide and Hardware Global LLC are in the decision stage, which means that sales should consider investing more time. Marketing intent data, from sources like 6Sense or ZoomInfo, says this should be low hanging fruit and a good target area to create pipeline.

The screenshot displays the Clari Account Engagement interface. At the top, it shows 'Account Engagement' with a search bar. Below this, there are filters for 'Show activity by account' (set to 'for the last 7 days') and 'Account Owner Mode'. A 'Filters' section includes 'Add Filter', 'Chart Settings', and 'Type: 3 Selected'. The main table is titled 'ACCOUNT DETAILS' and has columns for NAME, OWNER, PRIORITY, OPEN \$ AMOUNT, INTENT BUYING STAGE, NOTES, INDUSTRY, MEETINGS (TOTAL, UPCOMING), and EMAILS (SENT, RECEIVED). A dropdown menu for 'INTENT BUYING STAGE' is open, showing options: Decision, Consideration, Target, Decision, Target, and Consideration. The table data is as follows:

NAME	OWNER	PRIORITY	OPEN \$ AMOUNT	INTENT BUYING STAGE	NOTES	INDUSTRY	MEETINGS TOTAL	MEETINGS UPCOMING	EMAILS SENT	EMAILS RECEIVED
Security Worldwide	Michael Anderson	P1	USD 324,000	Decision	1,100	Retail	25	21	41	8
Flash Co.	Peter Clark	P2	USD 809,000	Consideration	8,400	Financial	25	21	25	6
Flash	Michael Anderson	P1	USD 142,000	Target	200	Technology	24	19	1	2
Hardware Global LLC	Michael Anderson	P1	USD 5,800	Decision	8,800	Biotechnology	24	15	31	9
Hardware Global LLC	Michael Anderson	P2	USD 7,100	Decision	7,100	Retail	24	4	6	9
Hardware Global LLC	Michael Anderson	P3	USD 633,000	Target	6,600	Retail	23	12	37	10



The team wraps their review by discussing early stage Enterprise deals that look like they are stuck. This relationship insights view makes it easy to review deals that are single threaded or deals stuck in early stage for too long like Flash Storage.

- Lack of engagement from our champions.
- They've replied to one of the 12 emails we've sent in the past month.
- No upcoming meetings scheduled.

EMAILS SENT
Dec 21, 2020 - Dec 27, 2020

Dec michael@getstoragesys.com
26 Re: Picking up from First Meeting
johnsmith@culicue.com

Dec michael@getstoragesys.com
23 Picking Up from First Meeting
johnsmith@culicue.com

Clari Customer Spotlight



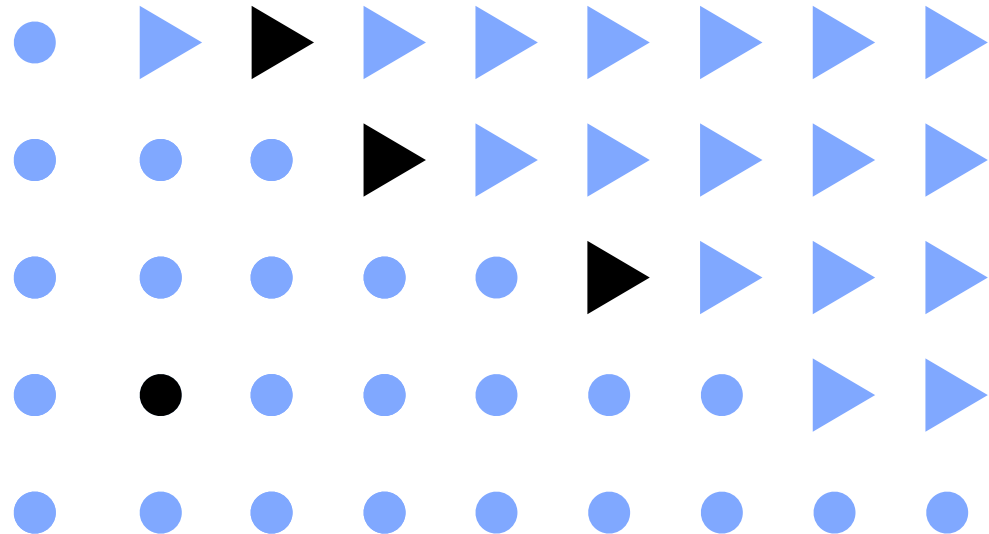
—Knowing where we stand with our target accounts is priceless. We used to run reports and request updates from individual reps to understand where we had risk and upside.

With Clari, we have all our account engagement data at our fingertips, so we can make informed decisions about account segmentation and territory planning, and understand what actions we need to take to accelerate conversions.

Jake Mars
SVP Americas @ Alteryx

On the path to becoming a public company, **Alteryx** moved to Clari to increase forecast accuracy and improve sales execution across their business.

Today, over 200 reps are managing opportunities and their forecast in Clari. With more pipeline visibility, sales managers and executives can now confidently project current and future quarters with accuracy backed by Clari AI insights.



Conclusion

After spending the day exploring these critical questions with his team, White feels ready to tackle his plan for the next fiscal year. He and his whole revenue team know the plan to reach the goals and predictably forecast for the future. While GSS Corporation is a fictional company that only lives in the Clari Demo Space, it's based on real life examples. Here at Clari, we partner with our customers to provide a best in class revenue experience and drive predictable revenue in your businesses.

The winds can blow, the rains can come, but with Clari even the cloudiest days can seem sunny because you'll be breaking through the data noise to better forecasting future.

If you're ready to join the future of forecasting, [book a demo here.](#)

—Clari gives us full visibility into our revenue performance from the rep all the way to our CRO and executive team, making our end-to-end forecasting incredibly efficient.

Mohit Daswani
CFO @ Thoughtspot

—We know with confidence where we are in the quarter, what's left to get done, and how we're going to get there.

Steve Winter
CRO @ Coupa



Clari's Revenue Operations Platform improves efficiency, predictability, and growth across the entire revenue process. Clari gives revenue teams total visibility into their business, to drive process rigor, spot risk and opportunity in the pipeline, increase forecast accuracy, and drive overall efficiency. Thousands of sales, marketing, and customer success teams at leading companies, including Okta, Adobe, Workday, Zoom, and Finastra, use Clari's execution insights to make their revenue process more connected, efficient, and predictable. Visit us at clari.com and follow us [@clari](https://www.linkedin.com/company/clari) on LinkedIn.