

# Forecasting Blueprint

A short guide for designing a repeatable forecasting process that drives efficiency and accuracy.

With the right forecasting blueprint, you can effectively drive predictable revenue. Here are the key steps you need to take to create a forecasting process that drives alignment across your revenue team and leads to forecast consistency quarter after quarter.

## Go-To-Market Framework

Start by outlining your GTM strategy and growth initiatives and how your revenue team is structured to support it.

REVENUE TYPES	RESPONSIBLE	QUOTA BASED ON
New Business	AE	Net New ARR \$ from new customers
Upsell/Cross Sell	AM	Net New ARR \$ from existing customers
Renewals	CSM + AM	Renewal Rate %

## Metrics and KPIs

Define the key metrics you need to measure and inspect so you can track and report on the performance of the business to the board or the street.

### Metrics

- Attainment
- Growth/Retention
- Renewal Rate / Churn

### Pipeline Generation

- X # deals generated per w/m/q
- X% deals sourced from abc

### Accuracy

- + / - % from week 2
- + / - % from week 10

### Coverage

- X coverage for CQ by week x
- X coverage for CQ+1 by week x
- X coverage for CQ+2 by week x

### CRM Hygiene

- No overdue deals
- Close Date, Stage, Forecast Category, Next Steps are updated before Rep<>Manager 1:1

### Linearity

- X% of quota closed by month 1
- X% of quota closed by month 2

## Forecasting Structure

Determine what you need to forecast and who submits a forecast.

Who is forecasting?

What part of the business are we forecasting?  
How do we make our call?

What else do we want to have visibility into to make the call?

NAME	COMMIT	UPSIDE	PIPELINE	QUOTA COVERAGE	COMMIT COVERAGE
[Avatar]	40k	43k	25k	1.3X	1.8X
[Progress Bar]	89%	96%			
[Avatar]	15k	14k	7k	1.2X	1.2X
[Progress Bar]	100%	93%			

## Operating Cadence

Design the sequence of meetings throughout the quarter including the themes, KPIs and participants of each meeting.

WEEK	1	2	3	4	5	6	7	8	9	10	11	12	13
THEME	Forecast Outlook & Slip	Forecast Post QBR Follow-Up	Forecast M1 SOE (Linearity)	Pipeline Q+1 Pipeline	Forecast CQ Focus	Pipeline Q+1 Pipeline	Forecast M2 SOE (Linearity)	Pipeline Q+2 Pipeline	Forecast CQ Focus	Pipeline Q+2 Pipeline	Forecast CQ Focus	Forecast CQ Focus	Close Out CQ!
INSPECT	MEDDIC & SOE of Slipped Deals	Action Items, CQ Top Deals	Steps to close M1 deals	CQ Forecast, Top deals Pipe Gen, Q+1 Coverage	CQ Top Deals, MEDDIC, SOE	CQ Forecast, Top deals Pipe Gen, Q+1 Coverage	Steps to close M2 deals	CQ Forecast, Top deals Pipe Gen, Q+2 Coverage	CQ Top Deals, MEDDIC, SOE	CQ Forecast, Top deals Pipe Gen, Q+2 Coverage	Top Deal SOE	Top Deal SOE	Top Deal SOE

## Moments that Matter

Design key interactions (i.e. 1:1s, forecast calls, pipeline reviews) that drive consistency and alignment across the revenue organization.

- 1:1 coaching sessions
- Forecast calls
- Pipeline reviews
- QBRs
- Board meetings

## Adoption Plan

Align and execute on the Future of Forecasting in your organization.



## Continuous Maturation

How do we continue to inspect how this is going and mature our process as we excel in what we are doing today?

Now repeat