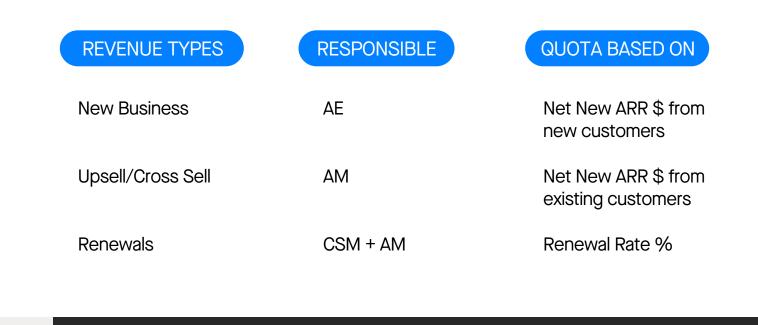
# Forecasting Blueprint

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.



### **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

### **Pipeline Generation**

Renewal Rate / Churn

- 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. What part of the business What else do we want to are we forecasting? have visibility into to make How do we make our call? the call? Who is forecasting? **COMMIT UPSIDE PIPELINE NAME QUOTA COVERAGE COMMIT COVERAGE** 40k 43k 25k 1.3X 1.8X 89% 96% 14k 15k 7k **1.2X** 1.2X 100% 93%

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

**Operating Cadence** 

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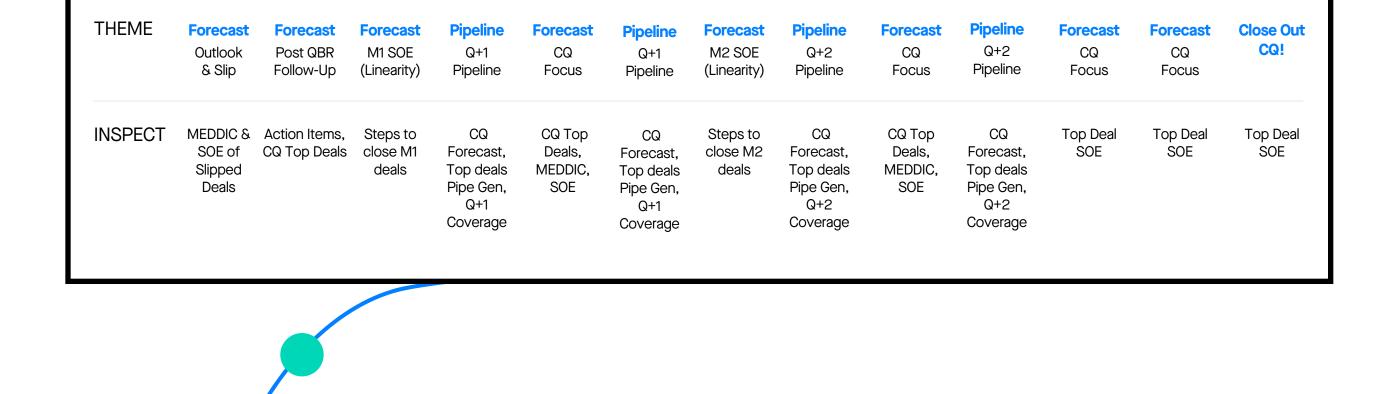
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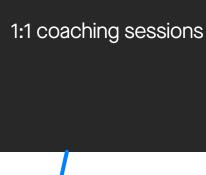
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## consistency and alignment across the revenue organization.

**Moments that Matter** 

Design key interactions (i.e. 1:1s, forecast calls, pipeline reviews) that drive



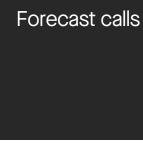
Align on delivery schedule

**WEEK** 

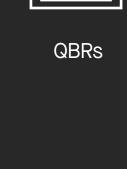
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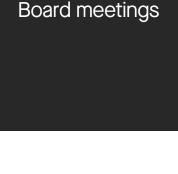
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Send launch

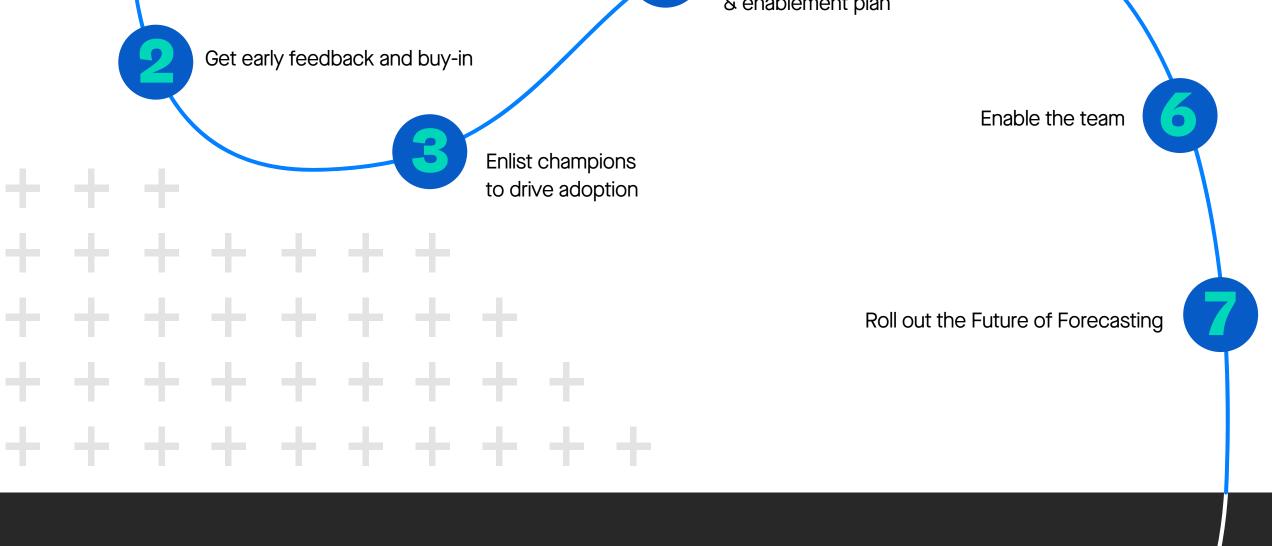
communication from CRO



**Adoption Plan** 

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

Create communication & enablement plan



**Continuous Maturation** 

Now repeat

How do we continue to inspect how this is going and mature our process

as we excel in what we are doing today?



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