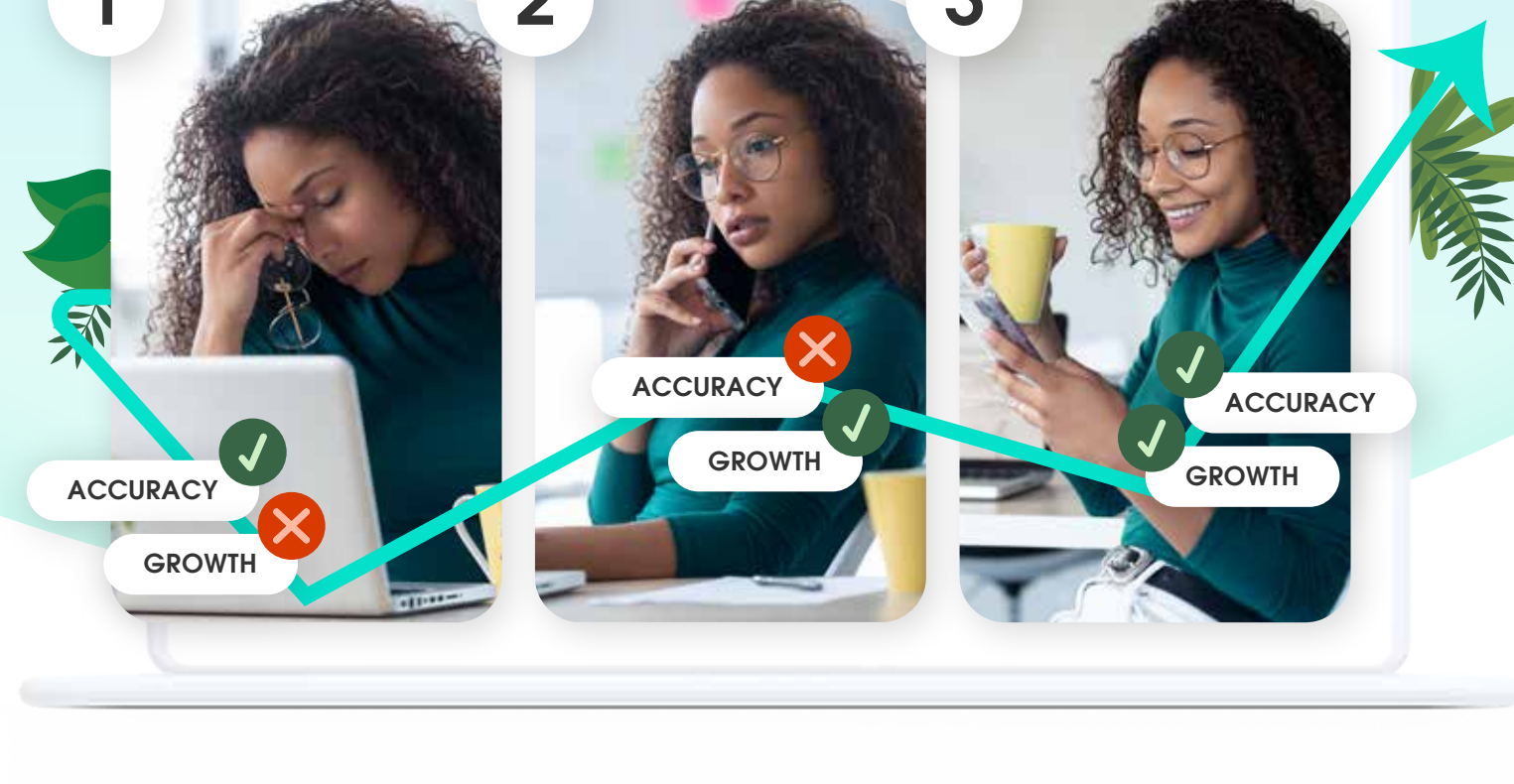




Forecast Your Way to Revenue Growth: A Blueprint for Sales and Revenue Leaders

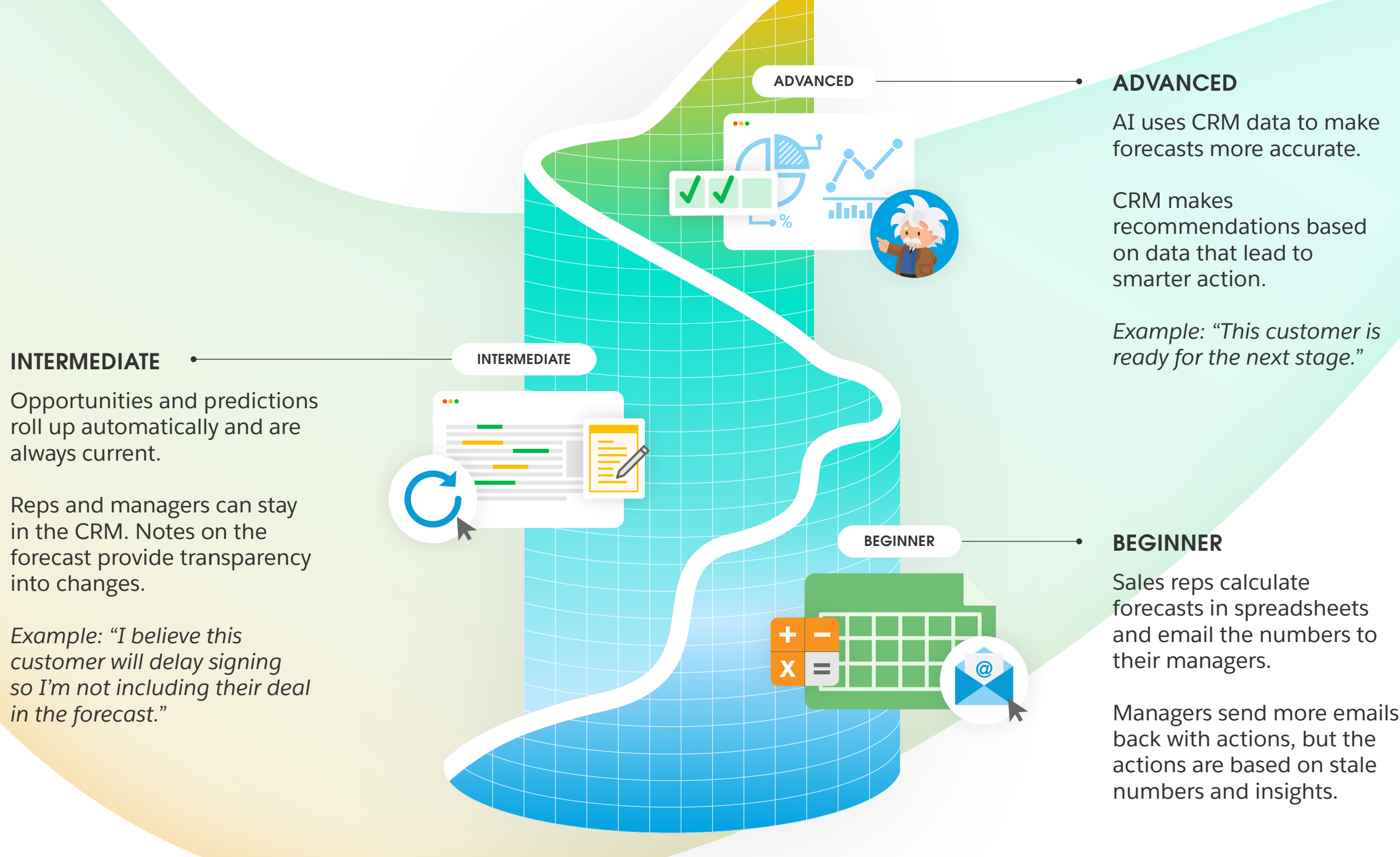
Great sales forecasting isn't just about accuracy. It's about growth. (You want both.)



SCENARIOS

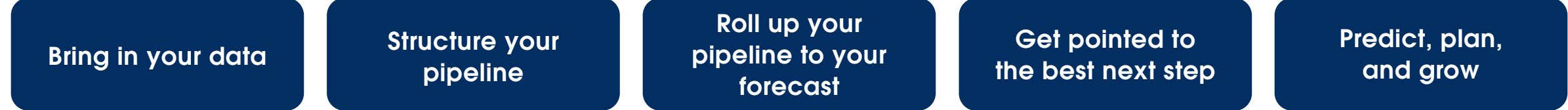
- 1 Revenue falls – as predicted.
- 2 Revenue grows – not as predicted.
- 3 Revenue grows – as predicted!

Where are you on the sales forecasting journey?



Growth forecasting: How it works in Salesforce

Dream of big numbers and hit them — without ever leaving the CRM. Here's how it works.

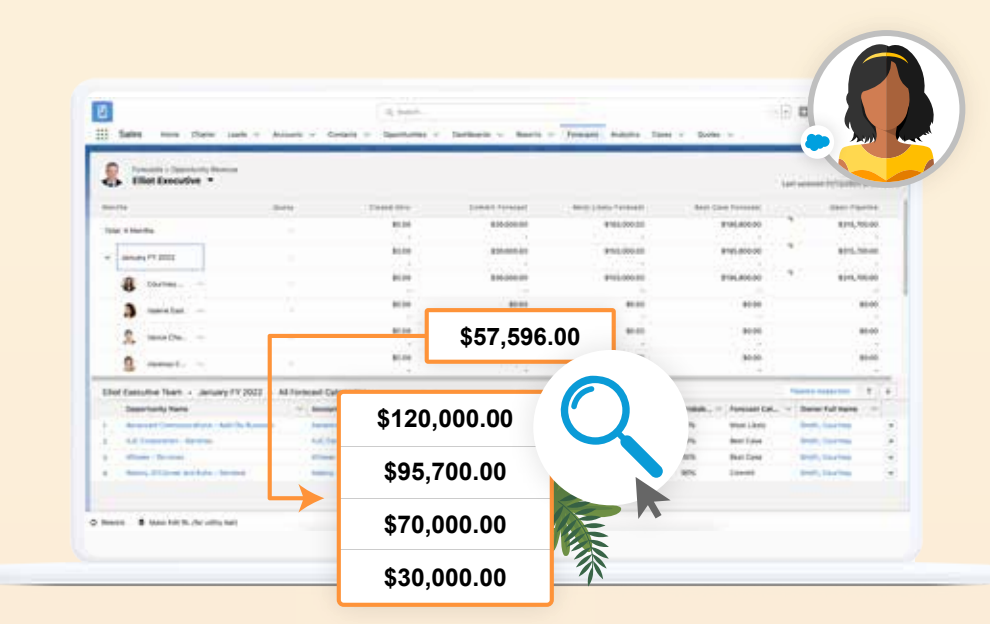
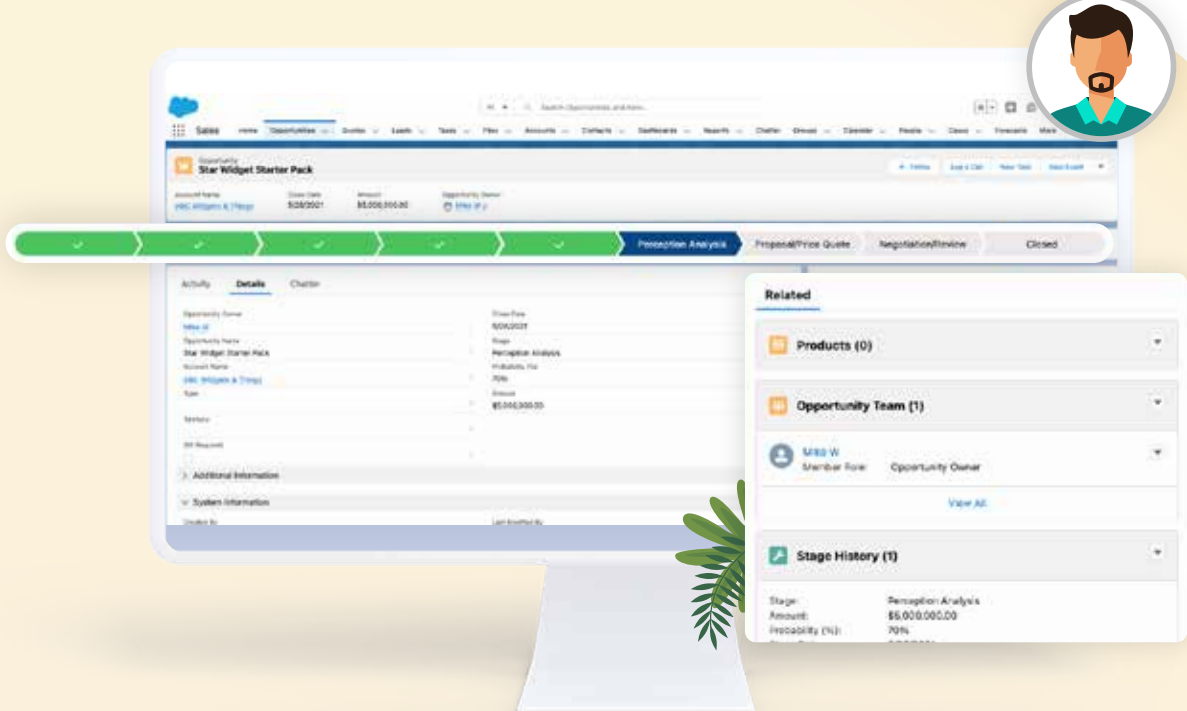


Bring customer data into Salesforce for total visibility

Bring all your data in one place, and never lose track of customers as they make the journey downstream. Salesforce translates sales and revenue data into apples and oranges apples that you can see as they flow down your pipeline – as leads turn into deals and deals turn into revenue.

Structure your pipeline to see the status of every deal

Beyond common data, your teams need a common sales process, too. Define the stages of your pipeline in Salesforce so all your reps know what's required to move customers to the next stage. Leaders can view snapshots of opportunities to intervene when forecasts are at risk, and work with sales reps to advance deals together as a pack – no more lone wolves.

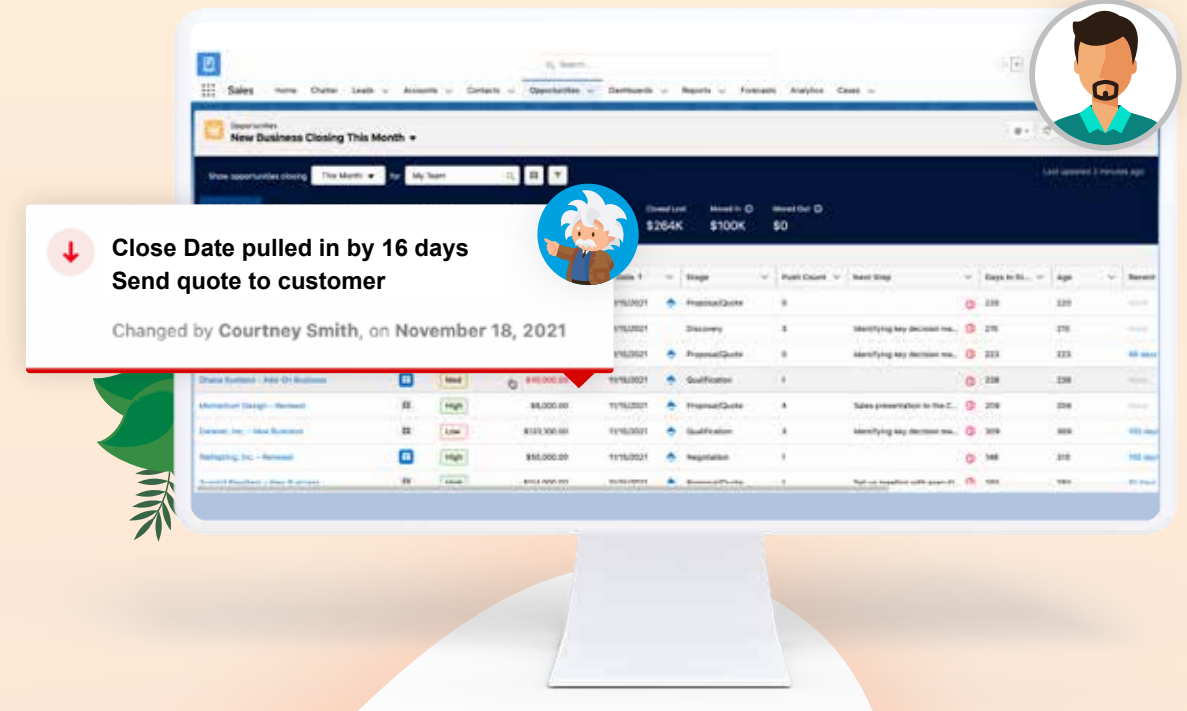


Roll up your pipeline to create automatic forecasts in real time

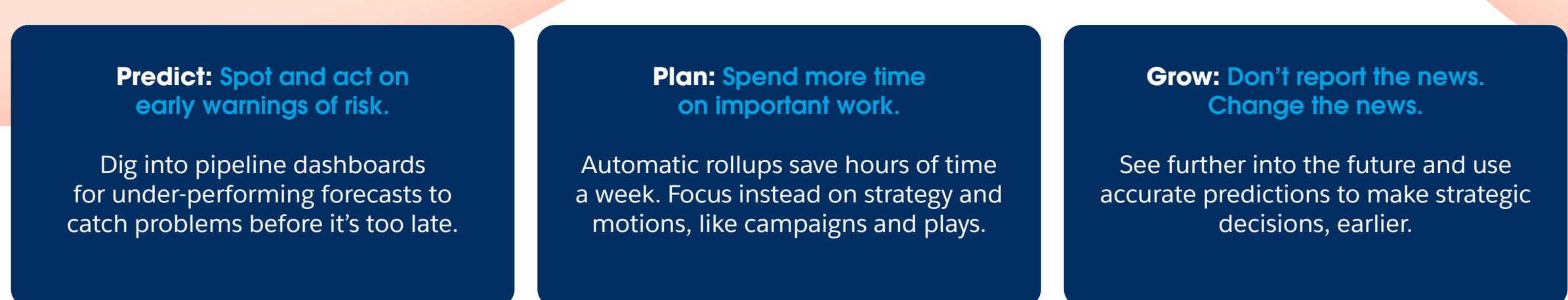
As you make changes to opportunities – by updating fields or moving them to different stages – forecasts update automatically in Salesforce. View forecasts for any category ("Best Case Forecast" for example), and get the flexibility to build custom categories (like "Annual Contract Value") that match how you manage your unique business.

Get AI-powered recommendations for what to do next

Salesforce does math behind the scenes of every deal, serving up recommendations for the best actions to take on your deals. Take action to hit your forecast on the same platform where you get insights by making pipeline adjustments on the fly.



Benefits of Forecasting in Salesforce



Case Study: Lindus Construction increased forecast accuracy by 50% with Salesforce

Some people are born forecasters. Some have forecasting thrust upon them. Alex Lindus was born into construction. He went from doing it himself to leading a business with 150 employees and nine different product lines. It was time to level up, and Salesforce helped.



Challenges	It was a struggle to see where every deal was in the pipeline. Pipeline data was trapped in spreadsheets and on post-it notes in service trucks. Sales reps invented the script as they went along, wasting time on unqualified prospects.	On-site workers weren't performing in-line with the forecast. "We did whatever it took to get the job done, and our revenue was suffering." Alex refocused his people's attention on margin: how profitable projects were after materials and labor.	Sales forecasts and production forecasts were disconnected. Teams in the field weren't seeing what was being sold, so workers weren't being put to use and materials weren't being ordered in time. "Sales were booming, but nothing was ready to go."
Solutions	Shared dashboards show deal health and guide teams to act. "We look at the big picture and drill down to act on anything that's clogging our pipeline. Then we study our top deals and our best reps, and that becomes our new process. It's all about the data now."	Managers get alerts when the forecast is threatened by margin. "We predict margins before jobs begin. As people go to work and materials come in, Salesforce alerts managers when they risk over-running the forecast. This means we're always on track."	Forecasting data is connected across the revenue lifecycle. "Shared goals trickle down into the business. Salesforce gives us a control room to hit our growth targets – spend this much on marketing, get this many leads, order this much material, sell this many jobs."
Results	5% Increase in close rates	7% Increase in margin	15% Growth year over year

Learn to love your sales forecasting

Watch the demo or hit us up.
We're here to help you every step of the way.

Watch Demo

