

The Art & Science of Sales Forecasting Thursday, July 21th at 11 am PST / 2 pm EST

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mindtickle



Art & Science of Forecasting



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Linked in

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Future Proof your Forecasting

Bring Structure & Scalability to RevOps





Nice to meet you!

Team:

- 40 sales reps (not including BDRS)
- 6 regional managers
- Multi-product business

Goals:

- Forecast accuracy
- Reduce deal variance & slippage
- Improve productivity
- Greater visibility for coaching & enablement



VP, Revenue Operations

CRO Top Priorities

CRUSH QUOTA CONSISTENTLY

Deal intelligence and fact-based forecasts

BUILD A REVENUE ENGINE

Systematic enablement + coaching that creates more winners



Our approach



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Our forecasting roll-out process

- Weekly forecast submission
 - Thursday AEs
 - Friday Managers
 - Monday review with CRO
- Current Quarter + Next Quarter
- Current Quarter with breakdown for Month 1 & Month 2



Focus Area #1: Risk Assessment

- Review pipeline at scale. Then, zero in on at-risk opportunities
- Uncover risks & mitigate deal slippage
- Empower managers & help them focus with account & deal level data
- Enable reps to self-coach

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Focus Area #2: Build a Bridge to Enablement

- Inspect emails/calls
- Know which deals & calls to review without much thinking
- Compete coaching forms & sessions
- Enable self-coaching & role-plays



1Passw@rd

The Art & Science of Sales Forecasting

Navin Persaud

Head of Revenue Operations

1Password

July 21st 2022

Process, People, Platforms

- Build efficient, scalable & repeatable processes.
- Guide & enable **people** to understand & use the processes.
- Leverage a unified **platform** to accelerate business insight.

Forecast Foundation

1Passw@rd



Art vs Science

• A delicate balance that differs in every organization.

1Passw@rd

- Master the science, be aware (beware) of the art.
- Continually learn, refine, improve over time.



The Power of Predictability

- The goal of every company.
- The role in setting wider organizational priorities.
- Elevate your team/function within your organization.

1Passw@rd



The BoostUp Impact

- A simplified extension of what I see in the business.
- The empowerment of our sales leaders to take action.
- Actionable insight to drive continual learning & improvement.

1Passw@rd

• Time savings: work to improve vs analyze the business.



"Accountability through visibility"

	Q 8	Search for	deals, meetings and	calls						\$	96	
Roll Ups	J <mark>ps</mark> Pacing Targets							() DUE IN 2	DAYS	Submit Foreca	st	
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00,000	\$820,000	- 55%	\$460,000 +\$75k	108%	\$46	Team's Avg pipeline conversion rate is 30% in the last 4 weeks of the quarter at an ASP of \$150K, current pipeline is \$15.7M and contributes \$4.6M				\$1,600,000	↑	
50,000	\$785,000	- 54%	\$455,000 +\$60k	102%	\$44	Team on average creates \$2M in pipeline in the				\$1,550,000	¥	
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Lucas Lam Product and Solutions Director BoostUp

The [Science] of

Sales Forecasting



Custom Formula Weighted Roll-Up

Does your organization have specific indicators that they use as a barometer in each rollup?

You can use BoostUp to calculate commit gaps, weighted scores based on intent, and more. These custom metrics are all point and click configurable and self-service by your administrators.

2. Custom Forecasting Business Rules

Guide your team's forecasting submissions by setting automatic qualifiers or validation rules to determine what deals are eligible to be submitted into their forecasts, including auto-include and auto exclude.

This is a reliable way to promote best practices, data hygiene and more thoughtful rep forecasting.

				is, meetings, and calls				
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3. Global Business Types

Global Business Types allow you to delineate your business in ways that are meaningful for each role.

Global Business Types provide a way to create multiple instances of BoostUp inside one experience based on how you structure SFDC and segment your business or your sales team.

View: Opportunities - Cite	sing in: Current Qui	rter v Changes since	Last 30 Days + U	sers All - Deel Stage	45 AE Qualified (+6	0 v Fores	ast Category	Pipeline (+2) +	Opportunity Type	s New Business (+5)	 Risk Score Al 	• Stre	View		
Risk Categories All + Product	Type All + Licens	e Start Date All - Reco	and Type 012280000	009y1PAAQ (+1) + L	ast Touch Attributio	n All + M	sibility All -	Reset to Default							
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OPPORTUNITIES (2253)										Q. Search	Odar	wa • 🛃 10f46 4			
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Lewis, Robinson and Thompson	Adam Robinson	Define Busines	is Type												
Park-Jackson - Opportunity #74	Dryan Murphy	If your organization	n is using busines	ss types for forecas	t and sales targ	jets then s	et up your	business types							
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4 Blended Forecasting Models

As your teams progress through a quarter, you'll want flexibility in their month over month forecasting and how it can apply to the sum total of their overall quarterly call.

Blended forecasting, which is a mix of quarterly and monthly forecasts, is invaluable in situations where there is cross-functional team selling and you want to understand the forecast from each team member's point of view.

												SUBMIT FORECAST	
Closing in: Cu	rrent Quarter •	Changes since Last	30 Days •	Users Al +	Deal Stag	pes AE Qualifi	ed (+6) •	Forecast Categ	ory Pipeline (+2)	•	Save View	Overall	
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- Isaac Sire	ph Brooks	uc •	53 Media	an AEQua	ified	Pipeline		\$38,220	110 Jun 21	New Business	2.0		
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5. Multi-Role Deal Override

In today's world of team selling businesses need to understand how each member of a team is trending within a deal and what their commit forecast is at a deal level.

Get input from each team member to get a comprehensive view into deal's health.

Garrett Ellison Director, Enterprise Account Executive - East	\$4,772,245 Team: \$3,997,438	67%	\$1,137,690	\$3,096,488	\$1,941,788 -\$363.60K	\$3,229,628 • \$889.40K	\$3,791,156 + \$834.53K	\$3,450,000 Team: \$2,890,603	\$5,150,000 Team \$3,665,362	\$2,967,00 Team: \$2,958.90
 Laura Lyons Regional Director, Enterprise Sales 	\$1,500,000 Team: \$1,856,250		\$353,442	\$1,338,721 - 89%	\$985,280 -\$149.52K	\$1,213,656 - \$475,75K	\$1,649,248 -\$429,25K	\$1,400,000 Tearn: \$2,225,420	\$2,000,000 Team: \$2,229,524	\$1,055,86 Team: \$1,055,86
Adam Sandoval Enterprise Account Executive	\$337,500	55%	\$99,619	\$464,863	\$365,244 +\$161.59K	\$145,230 + \$21.76K	\$130,473 +35.30K	\$1,200,000	\$520,000	\$284,60
Isaac Singh Enterprise Account Executive	\$337,500	102%	\$65,547	\$461,820	\$396,273 - \$755,26	\$242,580 -\$45,47K	\$249,660 - \$109.00K	\$360,000	\$550,000	\$389,64
Keith Owens Enterprise Account Executive	\$337,500	44%	\$49,679	869,239 275	\$19,560	\$85,000 - \$85.00K	\$0 - \$2.90K	\$100,000	\$200,000	\$69,43
Michael Wolf Enterprise Account Executive	\$337,500	4%	\$7,539	\$7,539	80 (-\$19.36K)	8212,020 +\$247.06K	\$790,646 -\$67.27K	\$266,420	\$423,128	\$33,14
Nicole Kelley Enterprise Account Executive	\$168,750	35%		8151,584	\$54,144 (+\$54,74K	\$63,796 - \$98,96K	\$160,560 - \$180,32K	\$25,000	\$198,895	\$183,71
Whitney Padilla Service Enterprise Account Executive	\$337,500	68%	\$33,617	\$183,676	\$150,059 - \$21,95K	\$465,030 + \$22,50K	\$317,910 - \$85.05K	\$275,000	\$337,500	\$95,32
> Robert Huff Regional Director, Enterprise Sales	\$1,817,438 Team: \$2,395,875	79%	\$541,738	\$1,345,632	\$786,884 -\$198.40K	\$1,264,018 -\$152,94K	\$1,759,908 -\$171,27K	\$1,490,603 Team: \$1,938,855	\$1,685,362 Tear: \$3,074,255	\$1,173,20 Tears: \$1,173,20
> Shannon Harris	\$650,000 Team: \$748,325		\$242,511	\$412,135	\$159,624	\$751,954 \$350,70K	\$355,140 - \$234,01K	TANY \$353.509	- Tears: 81 011.658	\$729,83 Team: \$729.83

View: Opportunities ~ C	losing in: Current Qua	rter + Changes si	nce Last 30 Days +	Users All - Deal St	ages AE Qualified (+6) +	Forecast Category	Pipeline (+2) +	Opportunity Type	is New Business (+5	Risk Score /	d +	Save View
Risk Categories All - Produc	Type All - License	e Start Date All •	Record Type 01238000	00009y1PAAQ (+1) •	Last Touch Altribution Al	Visibility All -	Reset to Defau	e				
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OPPORTUNITIES (2253)							Opp 5	plit View 🥌 🤇	Search	Con	anns • 🛃	1 of 46 <
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Alchael, Hawkins and Wong - Op	Colton Sharp	Michael, Hawkins an	• 31 Low	0 · Not Score	d Proposal/Price	\$5,609 ĸ	5/3	Not Available	23	10 months ago	Best Case	31et Me
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Park-Jackson - Opportunity #74	Bryan Murphy	Park-Jackson	• 28 Lew	o · Not Score	I Proof of Conce	\$9,920	6/8	Not Available	39	10 months ago	Best Case	16th Ma
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laz-Hunter - Opportunity #7947	Nicholas Hubbard	Diaz-Hunter	o Gl Medium	o - Not Score	d AF Qualified	\$9.920	2/8		39	(*)	Pipeline	705-340

6. Opportunity Splits

Make it easy for your revenue team to collaborate and share opportunity revenue by enabling opportunity splits and customizing them for your business. This is extremely helpful for solution consultants, product specialists, renewal teams, and any scenario where partial deal attribution is present.

Account-Based Forecasting

There is often a need to break opportunities out within an account to accommodate different offerings, deal types, and cross-sell/upsell situations.

With BoostUp's flexible pivoting, you can view a rollup dashboard for each account that shows every opportunity within an account and all the associated deal indicators for each opportunity associated with that account.

View: Accounts ~ Clo	sing in: Current Quarter +	Last activity: La	st 30 Days + Us	ers All - Risk	Score All - Accou	unt Type Custom	er Account (+1) +	Created Date A	Visibi	ility All - Reset to D	Default		Save View
ACCOUNTS (2871)										Q Search	Colur	mns 🔹 🛓 1 of 5	58 < >
NAME	ACCOUNT OWNER	TIME SPEN	RISK SCORE	OPEN OPPS	OPEN AMO	WON OPPS	WON AMO 🗸	MEETINGS	NEXT MEETI	LAST CALEN	LAST TOUCH	LAST ENGAG	CONTACT
Mueller, Bowman and Sims	James Hansen	51	• 0 Low	5	\$76,440	44	\$2,160,163	0	10 months ago	a year ago	a year ago	a year ago	206
Armstrong-Willis	Martin Ellis	9	• 28 Low	3	\$0	2	\$1,635,938	0	۲	a year ago	a year ago	a year ago	65
Mclaughlin-Waters	Christopher Hickman	41	• 9 Low	6	\$49,250	41	\$1,357,141	0	10 months ago	a year ago	a year ago	a year ago	160
Krueger, Cunningham and Wilso	n Martin Ellis	29	o 57 Medium	0	\$0	8	\$1,057,595	0		a year ago	a year ago	a year ago	101
Mitchell PLC	Edward Evans	16	• 23 Low	3	\$319,250	18	\$729,354	0	10 months ago	a year ago	a year ago	a year ago	106
Dominguez, Carrillo and Mayo	John Flowers	27	0 39 Low	7	\$0	44	\$515,706	0	10 months ago	a year ago	a year ago	a year ago	115
Juarez-Wyatt	Jill George	53	o 3 Low	3	\$48,750	8	\$499,060	0	10 months ago	a year ago	a year ago	a year ago	273
Butler LLC	John Flowers	41	• 0 Low	1	\$0	20	\$452,426	0	10 months ago	a year ago	a year ago	a year ago	148
Allen and Sons	Mrs. Virginia Walter	32	• 18 Low	6	\$519,200	8	\$431,630	0	10 months ago	a year ago	a year ago	a year ago	100
Davis Inc	Richard Soto	8	• 45 Low	1	\$0	4	\$424,360	0	۲	a year ago	a year ago	a year ago	14
Herring Ltd	Daniel Reed	50	0 16 Low	9	\$178,652	9	\$404,551	0	10 months ago	a year ago	a year ago	a year ago	1101

Best Practices

Good Forecasting starts with Good Sales Process

- Sales Process should feed the Forecast Assembly & Submission
 - Ex. Pipeline inspection -> Deal Progression -> Forecast Submission(s)

Create Rules for "What can or cannot be Forecastable"

- Importance of adhering to sales process while allowing flexibility in forecasting
 - Ex. Deals in Commit must alway be in your forecast, Best Case is the bucket of deals that we review in the forecast meeting

Understand your "People + Process Interaction" and Continually Revise

- Are these interactions conducive to your forecasting process?
 - Ex. Are reps and managers aligned in the Forecast opinion or do they have differing opinions?

Next Month's Topic

"Data-Informed Revenue Decision-Making Using Sales Analytics and RevBI"

Thursday, August 18th, 11 am PT, 2 pm ET

