

# 7 Keys to Unlocking Accurate Sales Forecasts

(Hint, It's All About That Pipeline)



## RevOps leaders, something needs to be said – you can't forecast your way to growth.

Don't get us wrong – the forecast will always be important. Yet, many organizations struggle with accuracy.

The solution isn't a shiny new forecasting tool. Our take? Prioritize pipeline using these 7 keys, and forecasting accuracy will follow.

### Key 1

#### Fuel your CRM with better data

Is bad data costing you? You're not alone.

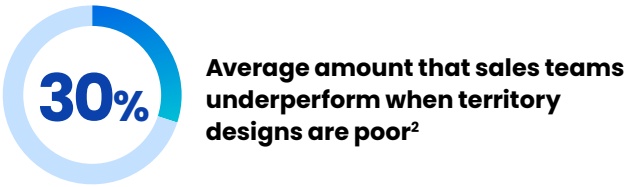


**What to do:** automate sales activity capture to forecast with accurate, complete data.

### Key 2

#### Execute your sales methodology in CRM to strengthen opportunity qualification

Sales territories feel out of balance? Can you validate reps are working top-priority accounts?



**What to do:** Use engagement data to pinpoint how many accounts each rep can successfully manage. Reallocate resources. Increase sales capacity. Build more pipeline.

### Key 3

#### Build and manage account plans directly in your CRM

MedDIC. MEDDPIC. BANT. No matter the methodology, you invested a ton of time and money to roll it out, yet struggle to measure adoption and impact.

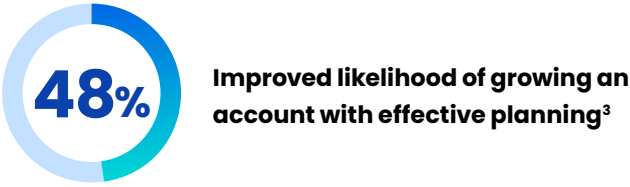
**Wish to wash your hands of it? (Yeah, that's probably not an option.)**

**What to do:** Find a low-touch way to enter qualification data, update steps, and use those insights to help track adoption and success – all from the CRM your reps already mastered.

### Key 4

#### Improved likelihood of growing an account with effective planning

No breaking news here, but effective planning helps with account expansions. Yet, ensuring reps execute those plans isn't easy. Or is it?



**What to do:** Explore account planning software that resides natively in your CRM – where your sales team already lives – and make it easy to assess account health, visualize buying groups, and identify whitespace opportunities.

### Key 5

#### Improve deal coverage using cross-functional multi-threading

Today's buying groups are complex – more people to convince, less time to do it.



**What to do:** Multi-threading as a team keeps deals on track and can help surface larger opportunities. Look for AI-driven alerts that can tell you if a opportunity is multi- or single-threaded so you can course-correct before the deal slips.

### Key 6

#### Prioritize leading indicators over lagging indicators to empower sales coaches

Enjoy reading the news? Yeah, it's informative, but you can't exactly enact change just by reading. It's kind of like relying on lagging indicators like average deal size to predict future outcomes.

**What to do:** Use leading indicators such as meetings booked per month to benchmark top-performing behaviors. Then, use these metrics to provide data-driven coaching to other reps and improve their performance.

### Key 7

#### Apply engagement scores to identify stalled pipeline and at-risk revenue

Use opportunity and stakeholder engagement scores to surface deals that have become stuck or stalled in the sales process. Then plot proactive next steps to resolve the issue, keep the customer engaged, and prevent the deal from falling through to ensure pipeline health and forecast accuracy.



## Ready to prioritize your pipeline?

Yes, forecast accuracy matters. But pipeline creation, coverage, and conversion are king. [Read our blog](#) for more details, then [register for a demo](#) to build a high-performing pipeline engine.

Get a Demo

<sup>1</sup> eWeek, "Study Looks at CRM Data, from Accuracy to Business Impact," May 3, 2022  
<sup>2</sup> Xactly, "Sales Territory Planning Best Practices," Aug. 15, 2022  
<sup>3</sup> Gartner, "B2B Sales: Why Your Account Growth Strategy Needs an Update," Aug. 13, 2018  
<sup>4</sup> LinkedIn, "Global State of Sales 2022"  
<sup>5</sup> Ramaswami, Rama, "Future of Sales 2025: Deliver the Digital Options B2B Buyers Demand," Gartner, March 21, 2021  
<sup>6</sup> LinkedIn, "Global State of Sales 2022"