

BoostUp 

10 Metrics to Drive Sales Forecast Accuracy

BUYER'S GUIDE TO ACCURATE FORECASTING



MEASURE YOUR FORECAST WITH THESE METRICS

The one way to guarantee an accurate sales forecast is to properly triangulate and verify your prediction. After all, if you are measuring sales performance, you also should be monitoring forecast performance.

When it comes down to what KPIs to use, operations leaders who regularly achieve a 95% (or greater) forecast accuracy swear by the following 10 metrics.

1. **Current Quarter Pacing**
2. **Historical Pacing**
3. **AI Projections**
4. **New Pipeline Expected**
5. **Pipeline Coverage**
6. **Next Quarter Pipeline**
7. **Committed/Best Case Roll-Ups**
8. **Manager/Rep Roll-Ups**
9. **Submission and Override History**
10. **Big Deal Dependence and Slips**

In the following pages, you'll learn how to use them to triangulate your forecast and make your most accurate sales projection yet.

1.

CURRENT QUARTER PACING

Current quarter pacing is simply the amount of revenue your team has created in your current quarter, versus the revenue goal.

This can be further broken down to month-by-month or week-by-week pacing. Then, use the breakdown to determine if your team is on track to meet their target, or if more revenue must be generated. If the team is lagging behind their weekly or monthly targets, then your forecasted number may not be met and requires adjustment.

Search for deals, meetings and calls

DASHBOARD WATERFALL ROLL UPS **PACING** TARGETS

Changes Since: Last 7 days Closing in: Current Quarter (Q2 2021) Manager: All Reset to Default

How are your reps pacing? Last updated on Jun 07 at 3:30PM

SELLER	TARGET	WEEK OF SEPT 13							TARGET	BOO
		BOOKED	BOOKED PACE	COMMIT	BEST CASE	PIPELINE	TOTAL PIPE	PIPELINE CO...		
Brett Turner	\$850,000	\$450,000 56%	Ahead by 6%	\$320,000	\$510,000	\$1,280,000	\$2,110,000	108%	\$850,000	\$400,000
Joseph Stevenson	\$820,000	\$450,000 55%	Ahead by 5%	\$340,000	\$490,000	\$1,230,000	\$2,050,000	97%	\$820,000	\$390,000
Lee Hicks	\$850,000	\$425,000 50%	At pace	\$325,000	\$565,000	\$1,215,000	\$2,105,000	103%	\$850,000	\$365,000
Lillie Bowen	\$800,000	\$380,000 47%	Behind by 3%	\$350,000	\$555,000	\$1,175,000	\$2,080,000	98%	\$800,000	\$380,000
Lelia Chambers	\$800,000	\$350,000 44%	Behind by 6%	\$360,000	\$490,000	\$1,148,000	\$1,998,000	92%	\$800,000	\$350,000
Alta Ramsey	\$800,000	\$320,000 40%	Behind by 10%	\$340,000	\$480,000	\$1,110,000	\$1,930,000	102%	\$800,000	\$320,000
John Hamilton	\$820,000	\$310,000 38%	Behind by 12%	\$330,000	\$490,000	\$990,000	\$1,810,000	95%	\$820,000	\$310,000
Inez Gibbs	\$850,000	\$315,000 37%	Behind by 13%	\$320,000	\$480,000	\$1,305,000	\$2,105,000	103%	\$850,000	\$315,000
Victoria Alvarado	\$800,000	\$287,000 37%	Behind by 13%	\$350,000	\$410,000	\$1,020,000	\$1,780,000	98%	\$800,000	\$287,000

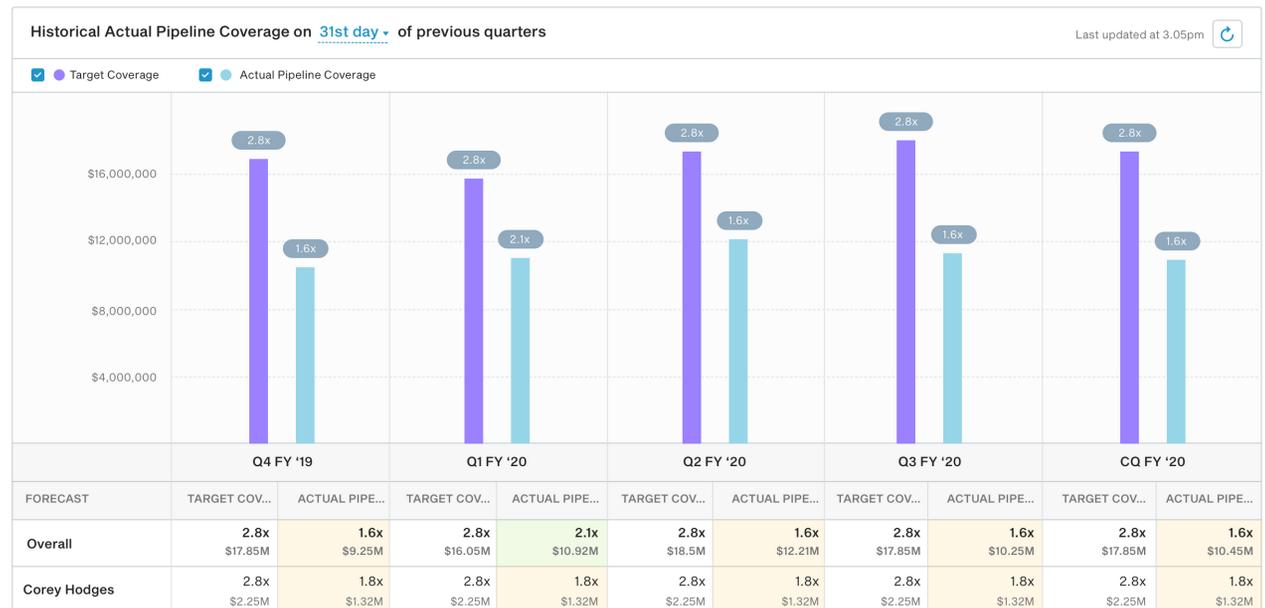
2.

HISTORICAL PACING

This KPI uses historical data on revenue generated in previous periods. You can use both the forecasted number and final outcome from the same time in the previous year, or even prior quarters.

Historical pacing can be difficult since it will not take into account additional headcount or different sales tools, but it can be extrapolated on a rep by rep number for better comparison.

Historical pacing can also be used with your current pacing to examine your team's performance on a monthly or weekly basis for more granular analysis. If your current quarter lags behind similar time periods, then your forecast is likely not accurate



4.

PIPELINE COVERAGE

Even if your team hasn't signed or committed enough deals to hit your forecasted number, there may be enough revenue in your pipeline to bring you to your goal.

Examine the total value of your pipeline to see if it is trending upward, downward, or remaining the same, and if there is enough potential revenue to meet your targets.

AI-generated risk scores and projected outcomes can be extremely useful in sorting out which deals will close. If there is not enough, your team needs to find new revenue, or your forecast must be adjusted.

Current Pipeline Coverage

MANAGER	Q1 TARGET	Q1 PIPELINE CO...	Q1 PIPELINE NEEDED	Q2 TARGET	Q2 PIPELINE	CFY TARGET	CFY PIPELINE
✓ Vincent Griffith VP North America	\$1,350,000	2.8x	\$4,050,000	\$1,250,000	\$3,550,000	\$4,350,000	\$13,050,000
> Bernard Gordon Regional Mngr US East	\$500,000	1.8x	\$1,500,000	\$450,000	\$1,250,000	\$1,500,000	\$4,500,000
> Eddie Mendez Regional Mngr US North	\$450,000	3.2x	\$1,350,000	\$400,000	\$1,150,000	\$1,450,000	\$4,350,000
> Adele Nichols Regional Mngr US West	\$400,000	2.5x	\$1,200,000	\$400,000	\$1,150,000	\$1,400,000	\$4,200,000
✓ Dale Douglas VP EMEA	\$1,250,000	2.1x	\$3,750,000	\$1,200,000	\$3,450,000	\$4,250,000	\$12,750,000
> Jason Townsend Regional Mngr Europe	\$450,000	1.7x	\$1,350,000	\$400,000	\$1,200,000	\$1,450,000	\$4,350,000
> Johanna Wise Regional Mngr Middle East	\$420,000	2.3x	\$1,260,000	\$400,000	\$1,180,000	\$1,420,000	\$4,260,000
> Mabelle Frazier Regional Mngr Africa	\$380,000	2.2x	\$1,140,000	\$400,000	\$1,070,000	\$1,380,000	\$4,140,000
✓ Lina Norton VP APAC	\$1,200,000	3.1x	\$3,600,000	\$1,200,000	\$3,150,000	\$4,200,000	\$12,600,000
> Eddie Fisher Regional Mngr India	\$400,000	3.0x	\$1,200,000	\$400,000	\$1,100,000	\$1,400,000	\$4,200,000
> May Curry Regional Mngr China	\$400,000	3.2x	\$1,200,000	\$400,000	\$1,050,000	\$1,400,000	\$4,200,000
> Dennis Cummings Regional Mngr Rest of APAC	\$400,000	3.1x	\$1,200,000	\$400,000	\$1,000,000	\$1,400,000	\$4,200,000

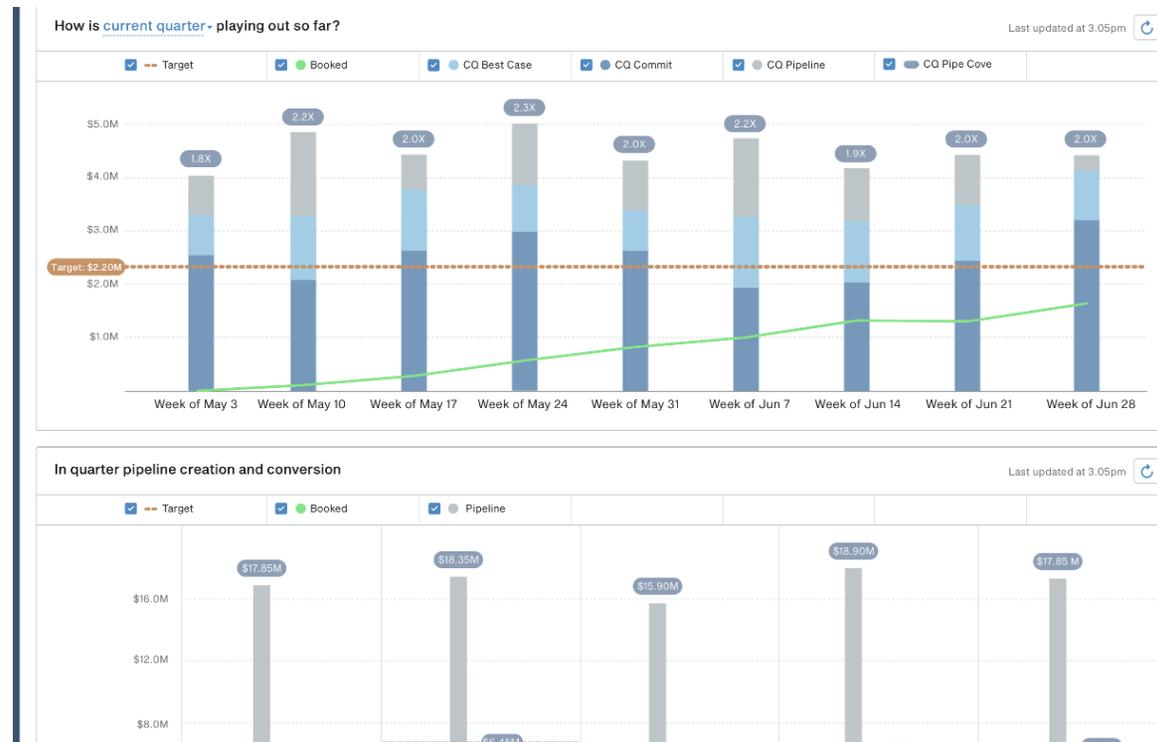
5.

NEW PIPELINE EXPECTED

If your team doesn't already have enough committed revenue to meet your forecasted number, the expected pipeline metric will tell you if there is enough coming pipeline to meet your goals.

With this number, the crucial component is exactly how much of that pipeline is expected to close in your given quarter. You may have enough expected revenue, but you must ensure there is enough committed revenue.

The AI-generated risk score can help determine exactly which deals will close when you need them to.

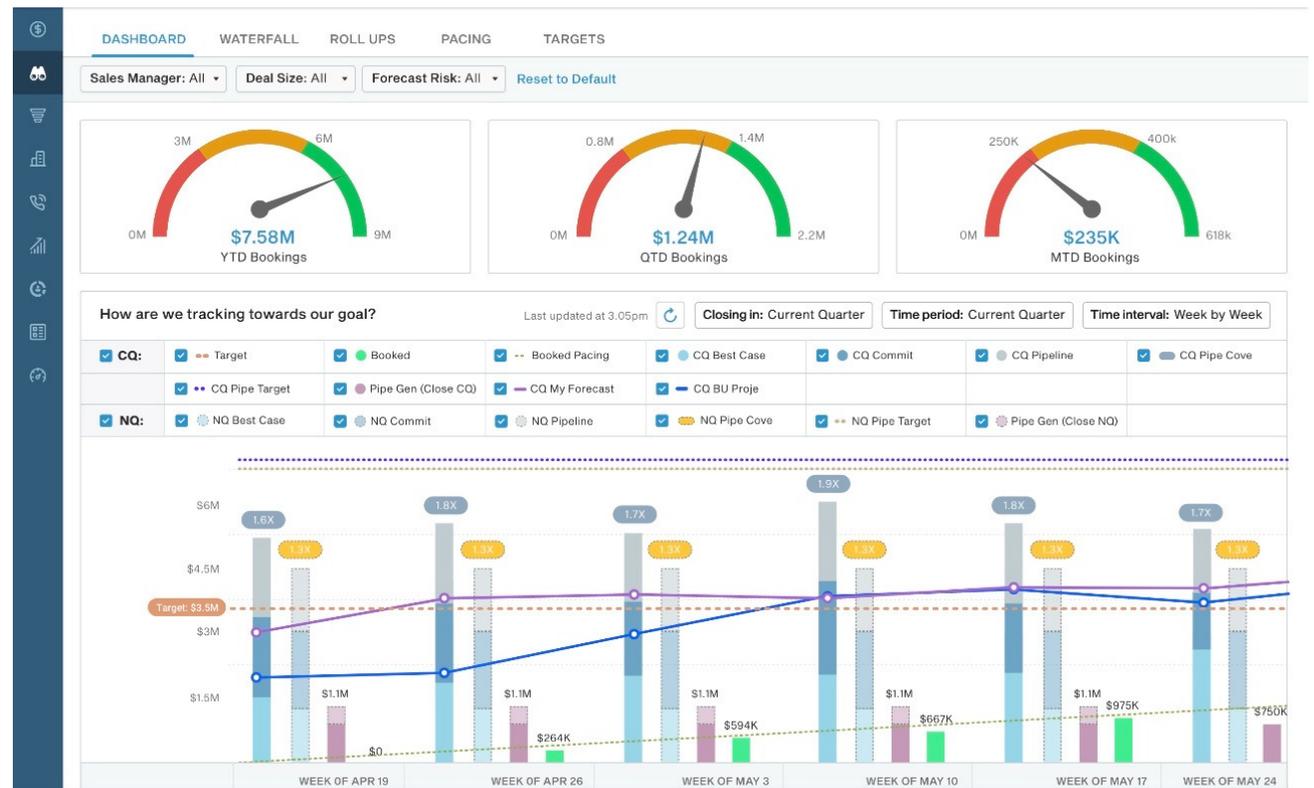


6.

NEXT QUARTER PIPELINE

While the current quarter may be your focus, the next one is always closer than it may feel. To consistently hit your forecast, you must constantly be thinking about how to build pipeline for the next quarter.

To meet your annual or semi-annual goals, you should always watch the revenue that is slated for the next quarter. Especially in organizations with longer sales cycles and complex products, it may take months before a deal can be considered “ready”.



7.

COMMITTED AND BEST-CASE ROLLUPS

Bottom-up rollups of committed and best-case deals are the most common way of forecasting today and can be used to verify your forecast.

Traditionally, this is how the majority of salespeople submit their forecast, but it can also be used as a factor to confirm the accuracy of your forecast.

Take the total roll-up of what reach rep believes they will close, and their best-case scenario and look for discrepancies between that number and your forecast, your accuracy may be at risk.

7.

Search for deals, meetings and calls
DG

DASHBOARD WATERFALL **ROLL UPS** PACING TARGETS
DUE IN 2 DAYS [Submit Forecast](#)

Changes Since: Last 7 days
Closing in: Current Quarter (Q2 2021)
Opportunity Types: All [Reset to Default](#)

CQ Target
\$12.8M

Total Booked
\$6.6M +52% to Target

CQ Managers' Call
\$12.2M -\$280K

CQ Reps' Call
\$13.8M +\$105K

CQ BU Projection
\$11.2M -\$185K

CQ Total Pipe
\$15.7M -\$385K

[Org Hierarchy View](#) [Org Level View](#)
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Last updated on Jun 07 at 3:30PM [Refresh](#) [Download](#)

MANAGER	CQ TARGET	CQ BOOKED	CQ COMMIT	CQ PIPELINE GAP	MAY'21 FORECAST	CQ FORECAST	CQ BU PROJECTION	NQ FORECAST
* Ethel Alexander <small>VP Enterprise Sales</small>	\$4,350,000	\$2,350,000 <small>54%</small>	\$1,350,000 <small>+\$90K</small>	90%	\$1,300,000 ⬇ <small>Team: \$1,350,000</small>	\$4,200,000 ⬇ <small>Team: \$4,350,000</small>	\$3,800,000 ⬇	\$4,500,000 ⬇ <small>Team: \$4,650,000</small>
> Julia Young <small>Regional Mngr US East</small>	\$1,500,000	\$820,000 <small>55%</small>	\$460,000 <small>+\$75K</small>	108%	\$465,000 ⬆	\$1,550,000 ⬆	\$1,550,000 ⬆	\$1,600,000 ⬆
> Allen Wilkerson <small>Regional Mngr US North</small>	\$1,450,000	\$785,000 <small>54%</small>	\$455,000 <small>+\$60K</small>	102%	\$445,000 ⬇	\$1,550,000 ⬇	\$1,400,000 ⬇	\$1,550,000 ⬇
> Alfred Fisher <small>Regional Mngr US West</small>	\$1,400,000	\$745,000 <small>53%</small>	\$435,000 <small>-\$45K</small>	106%	\$440,000 ⬇	\$1,400,000 ⬇	\$1,400,000 ⬇	\$1,500,000 ⬇
* > Theodore Reid <small>VP Commercial Sales</small>	\$4,250,000	\$2,200,000 <small>52%</small>	\$1,310,000 <small>-\$45K</small>	90%	\$1,300,000 ⬆ <small>Team: \$1,430,000</small>	\$4,050,000 ⬆ <small>Team: \$4,250,000</small>	\$3,700,000 ⬆	\$4,400,000 ⬆ <small>Team: \$4,500,000</small>
> Jim Sullivan <small>Regional Mngr Europe</small>	\$1,450,000	\$750,000 <small>52%</small>	\$435,000 <small>+\$30K</small>	95%	\$460,000 ⬆	\$1,450,000 ⬆	\$1,450,000 ⬆	\$1,550,000 ⬆
! > Irene Phillips <small>Regional Mngr Middle East</small>	\$1,420,000	\$730,000 <small>51%</small>	\$445,000 <small>-\$45K</small>	85%	\$470,000 ⬇	\$1,350,000 ⬇	\$1,350,000 ⬇	\$1,450,000 ⬇

8.

MANAGER AND REP FORECAST CALLS

A great way to look for inaccuracies in the bottom-end of your forecast is to inspect the differences between your manager and sales rep calls.

Examine what your managers are calling for the quarter, versus what the reps themselves are calling. How far are they, and what deals are included or excluded?



9.

SUBMISSION AND OVERRIDE HISTORIES

In the same vein as your manager and rep call, examine what managers override rep submissions on both deals and deal amounts.

Look at what was changed and by how much. This is a key indicator of differing perspectives and may show that some opportunities may not be won.

The screenshot displays a CRM dashboard with a search bar at the top and navigation tabs for Dashboard, Waterfall, Roll Ups, Pacing, and Targets. The 'Roll Ups' tab is active, showing a summary of key metrics:

- CQ Target: \$12.8M
- Total Booked: \$6.6M (+52% to Target)
- CQ Managers' Call: \$12.2M (-\$280K)
- CQ Reps' Call: \$13.8M (+\$105K)
- CQ BU Projection: \$11.2M (-\$185K)
- CQ Total Pipe: \$15.7M (-\$385K)

Below the summary is a table of managers with columns for CQ Target, CQ Booked, CQ Commit, CQ Pipeline Gap, May '21 Forecast, CQ Forecast, CQ BU Projection, and NQ Forecast. A modal window titled 'CQ Forecast History' is open, showing a list of forecast updates with dates, amounts, and deal inclusion details.

MANAGER	CQ TARGET	CQ BOOKED	CQ COMMIT	CQ PIPELINE GAP	MAY '21 FORECAST	CQ FORECAST	CQ BU PROJECTION	NQ FORECAST
Ethel Alexander VP Enterprise Sales	\$4,350,000	\$2,350,000 (54%)	\$1,350,000 (+\$90K)	90%	\$1,300,000	\$4,200,000	\$3,800,000	\$4,500,000
> Julia Young Regional Mngr US East	\$1,500,000	\$820,000 (55%)	\$460,000 (+\$75K)					
> Allen Wilkerson Regional Mngr US North	\$1,450,000	\$785,000 (54%)	\$455,000 (+\$60K)					
> Alfred Fisher Regional Mngr US West	\$1,400,000	\$745,000 (53%)	\$435,000 (-\$45K)					
Theodore Reid VP Commercial Sales	\$4,250,000	\$2,200,000 (52%)	\$1,310,000 (-\$45K)					
> Jim Sullivan Regional Mngr Europe	\$1,450,000	\$750,000 (52%)	\$435,000 (+\$30K)					
> Irene Phillips Regional Mngr Middle East	\$1,420,000	\$730,000 (51%)	\$445,000 (-\$45K)					
> Carlos Moss Regional Mngr Africa	\$1,380,000	\$720,000 (52%)	\$430,000 (-\$30K)	90%	\$500,000	\$1,450,000	\$1,450,000	\$1,500,000
Beatrice Carroll Sr Director Enterprise Sales	\$4,200,000	\$2,100,000 (50%)	\$1,320,000 (+\$90K)	112%	\$1,250,000 Team: \$1,250,000	\$4,000,000 Team: \$4,150,000	\$3,700,000	\$4,200,000 Team: \$4,350,000
> Lydia Adams Regional Mngr India	\$1,400,000	\$725,000 (52%)	\$450,000 (+\$40K)	108%	\$450,000	\$7,450,000	\$7,450,000	\$1,500,000

CQ Forecast History

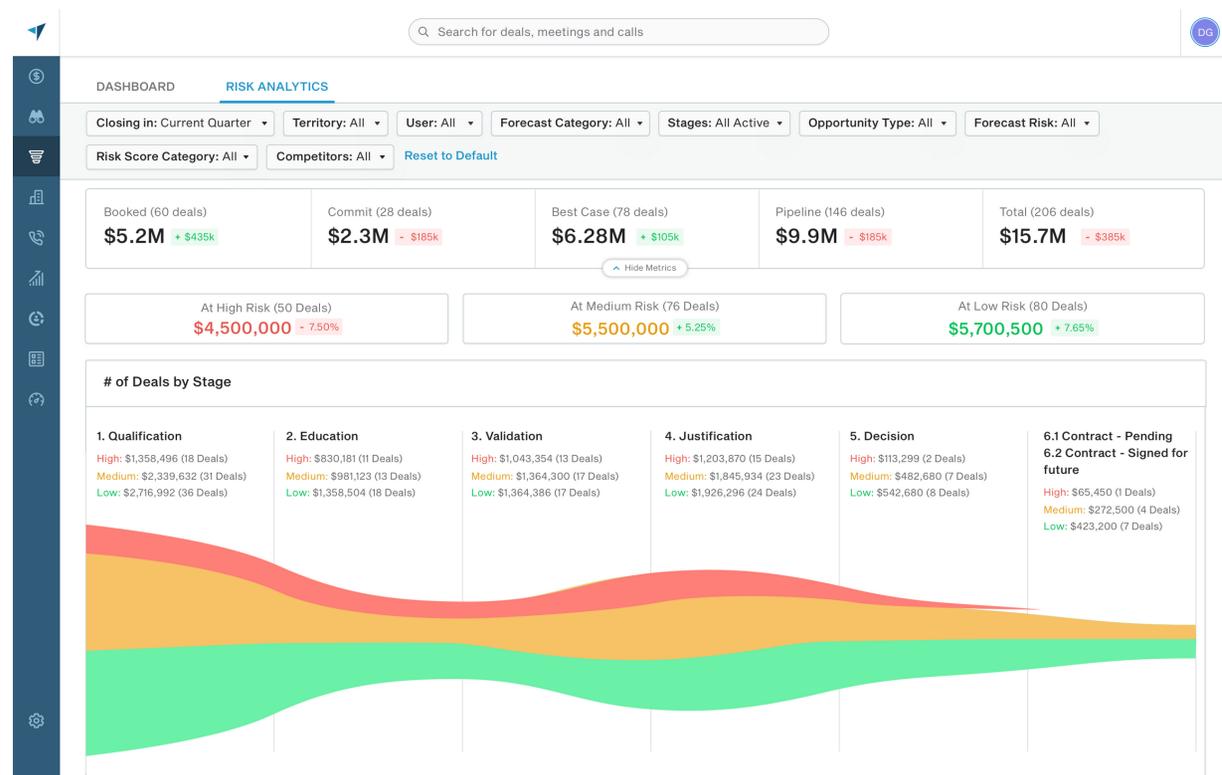
Date	Amount	Deals Included	Notes
Sep 10 '20	\$4,200,000	62 of 65	I excluded Acme, Sterling Corp & Duffcorp from this one, they are getting pushed out due to budget allocation.
Sep 3 '20	\$4,350,000	63 of 65	I excluded Acme, & Duffcorp from this one, they are getting pushed out due to budget allocation.
Aug 27 '20	\$4,300,000	63 of 65	Major Deals Duffcorp and Sterling Corp are on hold due to budget allocation of this quarter.
Aug 20 '20	\$4,300,000	65 of 65	Included all deals

10.

BIG DEAL DEPENDENCE AND SLIPPAGE

Is your forecast largely dependent on just a few large deals? If one slips, you may miss your mark.

Examine your forecast to determine what percentage depends on outsized deals, pay special attention to them, and watch how they progress. As time continues, work to decrease your dependence on large deals.



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