

## Team Sales Forecasting

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| <input type="checkbox"/> | <b>Review Sales Data and Key Metrics Regularly:</b><br>Your pipeline solution should show these in real time.  |
| <input type="checkbox"/> | <b>Have Clearly Identified Sales Process Stages:</b><br>Gather conversion rate and sales cycle per stage.  |
| <input type="checkbox"/> | <b>Monitor and Gather Individual Forecasts:</b><br>Help team members monitor each deal for accuracy.   |
| <input type="checkbox"/> | <b>Top of Funnel Forecasting:</b><br>Use the weighted probability formula, where each account is given a probability of closing based on stage, competitive analysis, and time frame for each opportunity. Then, aggregate the number. The formula is:<br><br>$\text{\$ Potential} \times \text{Probability of Close} = \text{\$ Weight Forecast}$ |
| <input type="checkbox"/> | <b>Weekly Health Checks:</b><br>Each rep should provide honest feedback and identify the stage of the opportunities in their own pipeline.   |