



The Step-by-Step Guide to Building an Accurate Sales Forecast

6 Tenets of an Accurate Sales Forecast

Credibility in hitting the number is absolutely the most important thing for a sales leader. And leaders that hit their number regularly, don't have it easy. It is usually a grind with a mad scramble at the end of the quarter to hit +/-5%.



The good news? Accurate sales forecasting no longer has to be a painful process. The answer: intelligent sales forecasting software driven by AI-supported processes. It's time to gain the confidence you need to hit your numbers consistently.

6 Steps to Building an Accurate Sales Forecast



Define Your Sales Process and Sales Methodology

First things first, in order to call and attain an accurate forecast, you must define your sales process and methodology. Consistency and clear definitions across these two areas are key to achieving your forecasting goals.

Establish Your Sales Forecasting Process and Cadence

Next, you'll need to clearly establish your forecasting process and cadence, including your forecasting categories.



Automate to Boost Productivity

Automation is valuable because it saves time, organizes, and applies discipline and rigor without manual effort.

Inspect Your Pipeline

Ensuring your pipeline is accurate and up to date by removing deals that don't belong improves sales and revenue analytics immensely.



Leverage Data to Increase Accuracy

Keeping real-time data at your fingertips is key to increasing forecasting accuracy. With robust data, you can model multiple scenarios as well as consistently track against the target and forecast call

Understand Changes, Correlations, and Trends

While you can do everything in your power to accurately predict your forecast, there will, of course, be changes. It's important to dig into these changes, understand them, and find trends in your forecasting predictions.



By applying AI automation in the ways described, you can trust your sales forecast while developing and making your Sales team stronger.

To see how your organization can take advantage of forecasting automation to provide consistent sales processes that boost sales forecast accuracy - take [a tour of Xactly Forecasting today.](#)

