



Forecastmanager

QUALIFY COMMIT CLOSE



Forecastmanager puts you in control of every sales opportunity

People in a sales role are constantly under pressure to hit sales targets and deliver results. This can lead to a lack of good sales qualification which can cause inaccurate forecasting.

The opportunity development process can rely more on completing actions rather than taking responsibility for outcomes.

Being over-optimistic or too pessimistic can cause a misalignment between what is forecast and the product or service delivery capability.

Forecastmanager, an App on the Salesforce App Exchange helps to solve these issues.

It improves a user's time management and provides help to measure and track target account information.

Forecastmanager leads to better qualification, better pipeline management and more accurate sales forecasts.

It helps to demystify the subjective elements of the forecasting process in order to make the most out of EVERY sales opportunity.

It also has reports that can be used to review and manage opportunities. This enables users to QUALIFY prospects, COMMIT them to CLOSE sales with confidence to improve performance.

How Forecastmanager works



Qualify your opportunities

Forecastmanager provides 10 Sales Questions which cover the main issues faced by every sales user. Each choice of answer is then measured and compared to actual outcomes.

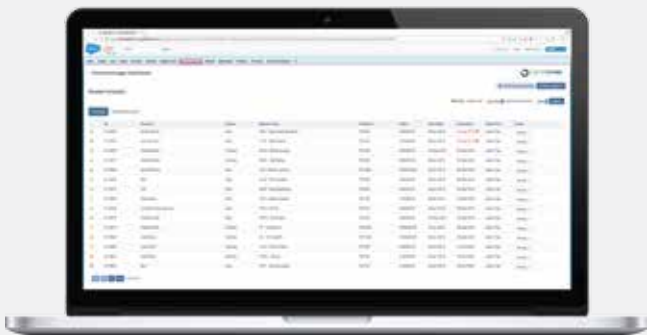
It makes the process of sales qualification easier and quicker to do. It guides users and helps them to get genuine commitment by asking the right questions. This improves their decision making and shortens the sales cycle.



Get a summary of your forecasts

Forecastmanager provides a summary of the Sales Questions with a current forecast projection percentage. This helps to better define, short, medium and long-term prospects.

It allows you to drill down into each Sales Question to review your answers and the progression of the opportunity. This helps users to manage forecasts in a way which is interactive.



Review your forecasts

You can review every forecast you produce in a clear and easy to understand way.

Forecastmanager uses a colour coded traffic light identification system to denote the current status of an open forecast and its percentage.

You can create new opportunities in Salesforce from within the App. It helps users keep on track with open forecasts as well as offering sales managers a chance to review opportunities.

Forecast with confidence and accuracy



See a breakdown of your forecasts

Forecastmanager offers a number of intelligent reports to help users and sales managers. It provides a breakdown of the latest forecasts and the opportunity, i.e. type, value, etc.

You can also see a recent history of previous forecasts to compare the progression of opportunities over time. This helps to identify which sales issues need working on.



Measure your Forecast To Order Ratio

Forecastmanager measures how good someone is at forecasting. This is done by creating a Forecast To Order Ratio which can give users 75%+ forecast accuracy.

You can also assess the strength of someone's future sales pipeline and view this as a list or a pie chart. This helps users and sales managers ensure that there are enough opportunities in the sales pipeline.



Get practical coaching advice

When someone gives an answer to a Sales Question, **Forecastmanager** offers practical coaching advice. It suggests realistic actions to help qualify the opportunity and gain the right level of commitment.

It helps to give users confidence to maximise every selling opportunity. It is also an essential coaching tool for sales managers to ensure that a sales pipeline is being developed well.

Forecast with confidence and accuracy

Mobile version

Forecastmanager also has a tablet and mobile version which is supported on the salesforce.com Cloud platform and is Salesforce1 compliant. It works on IOS and Android devices and enables every user to work with the App 'on the go'.

It enables users to complete new forecasts and modify existing ones, as well as viewing opportunities that have been won or lost.

The **Forecastmanager** mobile version is easy to use and an essential sales App for everyday use. It helps users and sales managers keep their forecasts up to date when working remotely in order to maximise their productivity.



How can **Forecastmanager** help to close more sales?

What Forecastmanager does	Benefits for the user
Provides simple questioning process with colour-coded traffic light system	Gives you greater control over your sales pipeline, making it easier to hit sales targets
Better sales development, qualification and accurate forecasting of sales opportunities	Gives users and sales managers greater confidence in the sales forecasting process
Helps users improve their time management	Increases productivity making it easier to meet deadlines and targets
Aligns the forecasting process and product or service delivery capability	It makes sales opportunities easier to manage
Provides realistic sales forecasts to avoid over-optimism or pessimism	Gives you an edge over your competitors when developing selling opportunities
Provides relevant and interactive user and sales management reports	Gives users more control over the sales process through improved communication

Forecastmanager value

Forecastmanager is intuitive and uses a process for evaluating the health of a sales opportunity that complements the weighted forecasting method.

It gives users a reality check in relation to the forecasting of sales opportunities. It also provides support and guidance in the form of an easy to use HELP guide and FAQs for users and sales managers. **Forecastmanager** enables a more confident approach by ensuring that everything has been done to maximise the chances of winning a sale.

It saves user's valuable time by making it clear whether an opportunity is worth targeting and if so, in a timeframe that is realistic. This makes it easier to deliver more accurate forecasts and close more sales.



T: +44 (0) 20 3034 0011