

# HOW XACTLY TRANSFORMED ITS SALES FORECASTING PROCESS AND ACHIEVED INCREASED ACCURACY WITH A DATA-DRIVEN SOLUTION

## » » » Xactly on Xactly Forecasting for Sales Operations Professionals

### SITUATION

Xactly's Intelligent Revenue platform supports an organization's decision-making through the full revenue lifecycle. By focusing on planning, territories, quotas, incentives, and pipeline management and forecast accuracy, teams are able to seamlessly transition from strategy development through execution and prioritization of all aspects of the revenue optimization process.

With a new CSO coming on board, there was an enhanced need to hone in on improving revenue predictability, increasing rep performance, and strengthening the partnership between Sales and Finance. Xactly Forecasting allowed the team to have readily consumable insights at hand to make rapid, educated decisions that increase forecasting precision and revenue predictability.

### CHALLENGE

Prior to the creation of Xactly Forecasting, deal reviews and pipeline calls were all manual, relying heavily on gut instinct. Going through the sales forecasting process this way was based more on past experience and instinct rather than hard data, often leading to last-minute changes, missed numbers, and a lack of trust in forecasting calls. Prior to implementing Xactly Forecasting, there was no unified platform that could give sales leadership a comprehensive and integrated view of their revenue pipeline health.

### SOLUTION


When you look at Sales Forecasting from the perspective of a Sales Operations or Sales Enablement leader, specific concerns and priorities take center stage. For our Sales Operations team, they were interested in implementing Xactly Forecasting in order to:

- ▶ Continue to build an effective and integrated sales tech stack
- ▶ Ensure we had the right data to report on
- ▶ Increase our reporting ease
- ▶ Build board-ready dashboards to increase team efficiency
- ▶ Enable front-line sales managers to coach reps more effectively

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Coming up with an accurate forecast can be challenging for organizations across all industries and sizes. I've been able to use Xactly Forecasting to increase this accuracy by gaining better pipeline visibility based on hard data and AI-optimized predictions.”

- **Clark Green**  
Vice President,  
Sales Operations



When we sat down with Clark Green, our VP of Sales Operations and Enablement, he emphasized how important monitoring and managing pipeline health is for success in his role. He shared that, “If a solution doesn’t help productivity or visibility then it’s not a priority for me in 2021.”

Even with tight processes and a skilled sales team, if you don’t have the right solution for sales forecasting it’s not possible to maintain the level of rigor and consistency needed to forecast accurately.

### RESULTS

- ▶ Achieve increased forecast accuracy
- ▶ Add a new level of intelligence and transparency to the sales process with Xactly Forecasting’s user-friendly dashboard
- ▶ Closed the gap between commit and quota using AI-guided sales coaching
- ▶ Easily manage and explain multi-level sales forecasts from sales rep to CEO
- ▶ Increase the quality and completeness of CRM data without taking any more time from the sales team
- ▶ Consistently execute on winning sales strategies

### KEY BENEFITS

- ▶ Visual Pipeline Management
- ▶ Intelligent Sales Forecasting
- ▶ Guided Coaching & Selling

