Checklist For Accurate Forecasting & Pipeline Review

☑ Determine your forecasting period

☑ Use historical trend data (e.g.) revenue figures from previous quarters, to help determine the pipeline number you're likely to end on

☑ Monitor what each rep calls and view their accuracy - step in when necessary to address any discrepancies

☑ Don't create a culture of over-forecasting due to fear - make sure it's fully accurate.

☑ Run multiple types of forecasting to help guide your decisions: manager gut-feeling and hard data bring a very accurate forecast.

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