

How to run the **Forecast Call**

The forecasting cadence creates a progressive roll up of forecast accuracy from Rep to [Manager] to [Second Line Leader]. Each layer adds inspection, validation, and strategic context while maintaining accountability through system commits.

WHO	WHEN	FOCUS	THE QUESTION IT ANSWERS
[Manager] + Reps, plus assigned [Sales Engineer]	Mondays, 60 minutes, weekly	The number, not pipeline health	"What will we land on, within tolerance?"

Prep

REPS

- Update forecast categories (Commit, Best Case, Pipeline)
- Identify one or two deals for inspection
- Prepare deal status, next steps, blockers

[MANAGER]

- Review rep prep and select deals for a deep dive
- Note patterns across the team (stage movement, slip risk)

Agenda · 60 minutes

- 10 min Kickoff**
Team wins and recognition; weekly focus and priorities
- 5 min Pacing**
MTD and QTD versus quota; closed, slipped, lost deals
- 40 min Rep by rep review**
Confirm forecast logic (Commit, Best Case, Pipeline). Inspect one or two deals: qualification, next steps, blockers. [Manager] provides direction and coaching; reps confirm weekly actions.
- 5 min Recap**
Pacing summary; key themes; rally cry for the week

After

- Reps execute on committed actions
- [Manager] updates the forecast in [CRM]
- Schedule deal specific coaching as needed

Discipline required

Forecast accuracy depends on honest categorization. Reps who sandbag or over commit make forecasting impossible. Coach to the definitions your organization uses for Commit, Best Case, and Pipeline.

Questions to ask

Use this framework when reviewing each [Manager] or Rep.

PACING

"You are at X percent to quota. Talk to me about your Commit number. What makes you confident?"

DEAL INSPECTION

"Walk me through [Deal Name]. What stage are they in, who are you engaged with, what is the next step, and when do you expect it to close?"

RISK ASSESSMENT

"What could derail this deal? What do you need from me or the team?"

BEST CASE AND UPSIDE

"What is in Best Case that could pull into Commit this week? What would it take to get there?"

ACTION COMMITMENT

"What are your top three priorities this week to move the number?"

Keep it out of this room

- Prospecting and coverage gaps: pipeline review
- Win and loss analysis: the weekly 1:1
- Career development and performance concerns: the weekly 1:1

The rhythm

Reps meet with their [Manager] on Monday. [Managers] roll up and review with their [Second Line Leader] on Friday. Commits are entered into the [CRM] at set times: Rep commit Monday AM, [Manager] commit Monday PM, [Second Line Leader] commit Tuesday PM.

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