

Revenue Operations & Forecasting

Forecast revenue, manage pipeline, and align teams with real-time visibility and analytics.

Specification

SKU	BUS-REV-FRC
Solution area	Business Operations
Works with	Sales CRM, Customer Lifecycle & Success Management, Product Analytics & Insights
Updated	Sep 26, 2026
Datasheet	v1.0

What it is

Revenue Operations & Forecasting is the process of managing pipeline performance, forecasting revenue, and aligning sales, customer success, and finance teams. It ensures that organizations can predict and optimize revenue outcomes.

SmartSuite’s Revenue Operations & Forecasting solution provides a structured, scalable system to manage pipeline performance, forecast revenue, and align teams across the full revenue lifecycle.

It enables organizations to move from disconnected spreadsheets and siloed reporting to a centralized, real-time revenue system.

Core capabilities

Pipeline Visibility & Management

Track deals and opportunities across stages.

Revenue Forecasting & Projections

Forecast revenue based on pipeline and trends.

Forecast Accuracy & Variance Tracking

Monitor forecast performance and deviations.

Sales & Customer Success Alignment

Connect pipeline with retention and expansion.

Revenue Reporting & Dashboards

Provide executive-level insights.

Deal & Pipeline Analytics

Analyze performance and conversion rates.

Scenario Planning & Forecast Modeling

Model different revenue outcomes.

Integration with CRM & Financial Systems

Align data across teams and systems.

Workflow Automation & Alerts

Trigger actions based on pipeline changes.

The Revenue Lifecycle

Step 1 Capture Pipeline Data Track opportunities and deal progress.	Step 2 Analyze Pipeline Health Identify risks and opportunities.	Step 3 Forecast Revenue Project future revenue based on data.	Step 4 Align Teams & Actions Coordinate sales, CS, and finance.	Step 5 Optimize & Improve Continuously Refine forecasts and strategies.
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Who it is for

Revenue Operations Teams Manage forecasting and pipeline performance.	Sales Leaders (CRO, VP Sales) Monitor pipeline and revenue outcomes.	Customer Success Leaders Track retention and expansion revenue.
Finance Teams (CFO, FP&A) Align forecasts with financial planning.	Executive Leadership Monitor business performance and growth.	Analysts Generate insights and forecasts.

Works with

Sales CRM Provides pipeline and deal data.	Customer Lifecycle & Success Management Tracks retention and expansion.
Product Analytics & Insights Supports usage-based forecasting.	

Built differently. Revenue Operations & Forecasting runs on the same relational platform as every other SmartSuite product, so its records link to the risks, controls, issues and evidence they affect, and every report reflects the current state rather than a copy.

See it working with your data

Ask your SmartSuite account team for a demo of Revenue Operations & Forecasting configured for your organization, or read the full product entry at smartsuite.com/products/revenue-operations-forecasting.

Schedule a demo