

Sales Forecasting Cheat Sheet for B2B SaaS companies

Process: Forecasting is a process, not a number. The better your process, the more accurate your forecast.

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Step 1: Forecast number

Most SaaS companies forecast on bookings, not revenue.

Bookings

OR

Revenue

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Step 2: Forecast frequency

Typically, this depends on your sales cycle. Examples:

Sales cycle	Frequency	Example
7 - 30 days	Daily - Weekly	B2C or SMB
30 - 90 days	Weekly	Mid-market
90+ days	Weekly - Bi-weekly	Enterprise

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Step 3: Opportunity record types

Run separate forecasts for different opportunity types to get higher accuracy. Each opportunity type has its own requirements for the forecast process. Aggregate numbers at the end to a single number or range.

New logos

Bookings from new customers that you win **for the first time**.

Expansions

Bookings from existing customers that **expand** seats or **buy another product**.

Renewals

Bookings from **existing customers** that are renewing their terms.

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Step 4: Forecast categories

Reps & managers can classify each opportunity in terms of confidence in winning the deal in the given timeframe.

Pipeline

Deals that have a **low closing likelihood** in the given time period. Customer is in the early stages of the buying process. Expect to win around 10-25% of these opportunities.

Best Case

Moderate likelihood of closing. Deals are fully qualified and have a closing plan, but there's work to do to advance those opportunities. Expect to win 30-50% of these opportunities.

Commit

High likelihood of closing at targeted value with a credible & documented close plan. Only unpredicted changes will make these opportunities slip. Expect to win 90% of these opportunities.

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Step 5: Forecast type

Start with one forecast type and keep it simple at first. At some point, most advanced companies use all three forecasting methods to drive higher predictability and forecast accuracy.

Weighted forecast

Complexity: low Accuracy: low to medium

Each stage has a closing probability that is multiplied by the deal amount. Weighted forecasts are an easy, low-effort way to get started.

Example

Probability * amount = weighted forecast

- Discovery stage: 10%
- Demo stage: 20%
- Value alignment: 35%
- Proposal: 60%
- Negotiation: 90%
- Closed Won: 100%

Pitfalls

- Unclear **stage exit criteria**
- Sales **stages** not followed
- Probabilities are **wrong**
- Probabilities are **hard-coded**
- Probabilities are **not adjusted over time**

What to weight on

- Stage**
- Forecast categories** (pipeline, best case, commit, most likely)
- Other** (depending on your unique sales motion and business requirements)

and / or

Bottom-up forecast

Complexity: medium to high Accuracy: high

Reps and/or managers submit forecast calls that roll up the organization. Start with one team to reduce initial complexity before rolling it out.

What

Typically, companies run a **weekly-, or bi-weekly forecast cadence** to submit, review, and adjust forecast calls. Start with one team and a simple cadence before involving the entire revenue org. If done right, bottom-up forecasts **give you highly accurate forecasts**.

Pitfalls

- Poor **process governance**
- Poor **data and pipeline hygiene** inevitably lead to inaccurate forecasts
- Missing forecast submissions**
- Failing to create a culture** and accountability around forecasting

and / or

AI forecast

Complexity: high Accuracy: medium to high

AI forecasts based on historical data, snapshots, and deal velocity. Treat it as an additional data point after rolling up your bottom-up forecast.

What

AI can help you get a **more holistic forecast** by considering patterns and factors beyond those typically taken into account for weighted or bottom-up forecasts. Examples:

- Deal velocity
- Past forecast accuracy by rep/manager
- Closed/won probability depending on multivariate deal characteristics

Pitfalls

- Poor data and pipeline hygiene** inevitably lead to inaccurate forecasts
- Changes** in processes or external factors take time to be reflected in your forecast
- High technical complexity** often requires internal resources and knowledge
- Black box characteristics** can lead to low trust within the org

Implementation

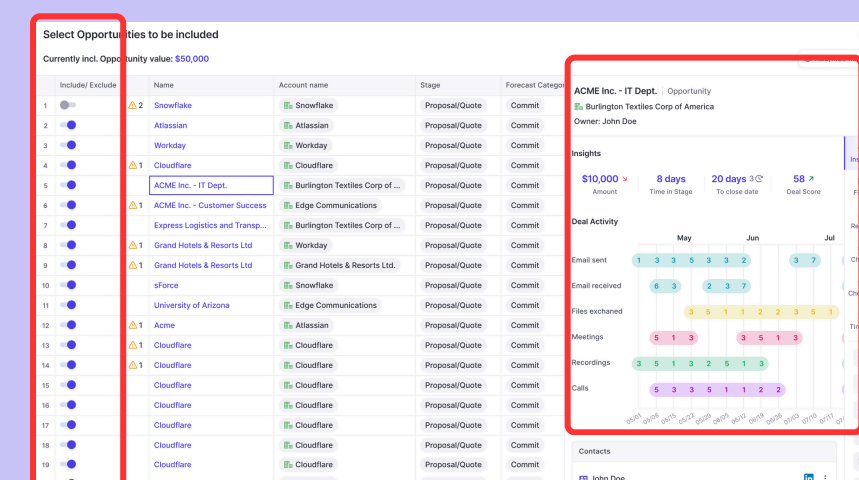
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Operating cadence (example)

Who	Monday	Tuesday	Wednesday	Thursday	Friday
CRO		Forecast meeting with managers, RevOps, etc.			
RevOps	Analysis & question formulation	Formulate action items	Chase action items from week before		
Managers					Forecast meeting with reps to inspect & adjust
Reps				Forecast call submission	
Forecast tool	Forecast call lock, snapshot, pacing		Reminder (submission, pipeline hygiene)	Final submission reminder	Automated roll-up, adjustments & track change

1. Forecast submission

Advanced forecast tools allow you to submit forecast calls by **including/excluding deals** into your forecast calls. **Deal insights** help you get better visibility and make a more accurate forecast call.



2. Inspection & Adjustments

What

Each manager can adjust the forecast calls of reps who report to them. The better your data and visibility into deals, the more accurate adjustments will be.

Pitfalls

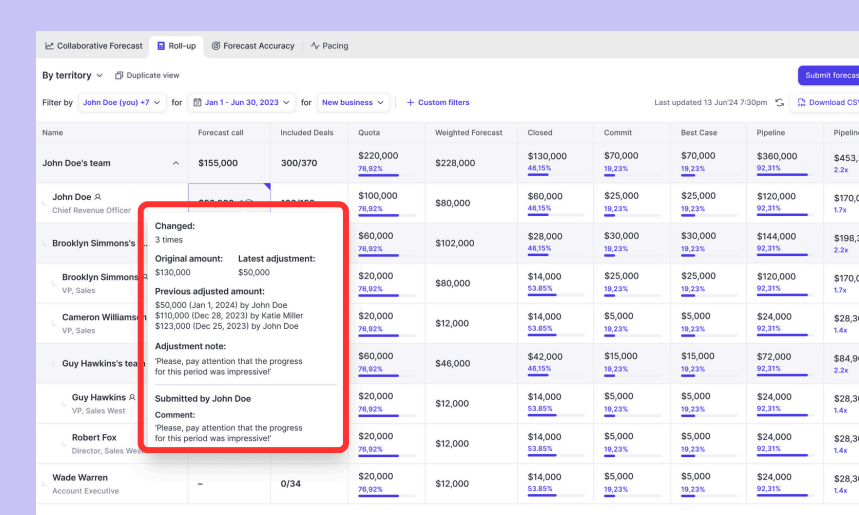
- No track change
- No adjustment notes
- No deal-by-deal adjustment snapshots
- Poor deal hygiene

Implementation

- Spreadsheet: Use comments to adjust (not reliable as it's not tracked/stored)
- Salesforce: Not possible
- Forecasting software (getweflow.com)

3. Roll-up

Advanced forecast tools allow you to **roll up your forecast** by role hierarchy, product, or territory. They also allow you to see how the **forecast call has changed** (increased or decreased), how often, and by whom.



4. Reporting & Snapshots

Snapshot your pipeline & forecast to track deal, pipeline, & forecast changes.

Why

Deals and forecasts change week by week:

- Slipped to next quarter
- Stage progression
- Amount changes

What

Pipeline:

- number of deals
- deal amount
- forecast category
- close date

Forecast: amount

Implementation

- Duplicate** spreadsheet tabs
- Snapshot reporting** in Salesforce
- Forecasting tool**
- Database** (BigQuery)

Systems: Systems follow the process, not the other way around. They should enable higher efficiency & forecast accuracy.

Pipeline hygiene

Current way

Your **poor data and pipeline hygiene** leads to:

- Inaccurate forecasts
- Poor pipeline visibility
- Bad deal execution
- Lost strategic insights
- Unclear hiring plan
- Low productivity
- Low discipline

Better way

Simplification and robust technology are key:

- Well-communicated and clear process
- Simple workflows
- Automated data entry (emails, meetings)
- Hygiene score

[FREE Salesforce Data Hygiene Cheat Sheet](#)

Submission process

Current way

- No operating cadence
- Poor stage definition
- Poor deal visibility
- Not data-driven
- Forecast adjustments & reviews not tracked
- Spreadsheet doesn't feed back into CRM
- Complicated submission flow

Better way

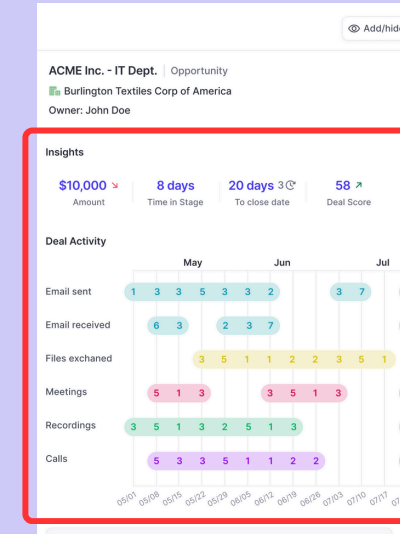
- Clear and simple operating cadence
- Easy & data-driven submission flow
- Flexible set-up
- Easy to implement
- Tracked forecast adjustments & reviews
- Syncs with your CRM if done externally

Visibility & Insights

Most managers have **poor pipeline visibility**. **Surface insights in your CRM** for data-driven forecast calls:

- Amount changes
- Time in stage
- # of close date pushes
- Deal velocity / engagement score

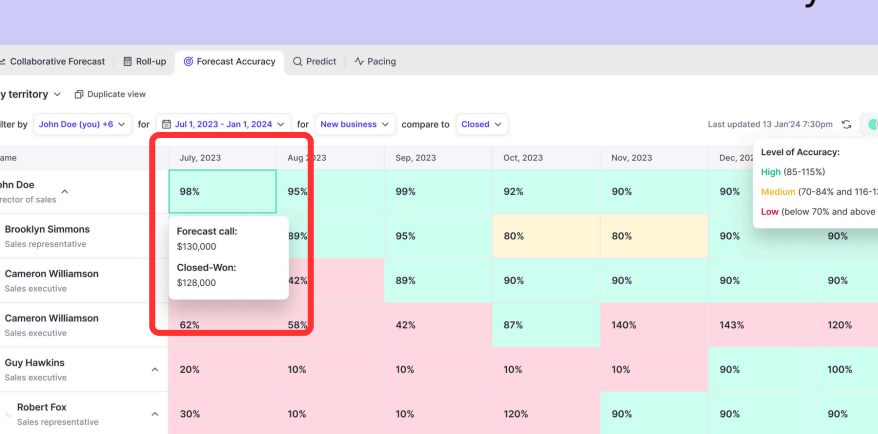
Tools like Weflow surface this for you automatically.



[FREE Pipeline Visibility Cheat Sheet](#)

Forecast accuracy

Track forecast accuracy by rep to learn for future calls. Tools like Weflow do this automatically.



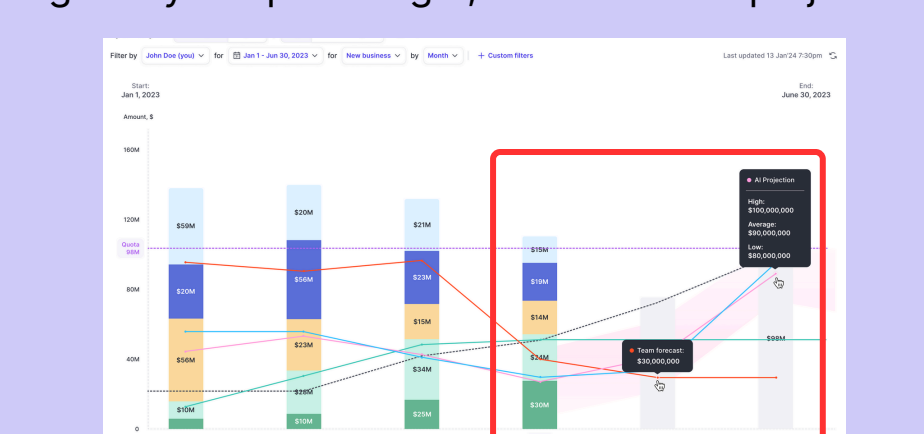
Snapshots

Snapshot your pipeline and forecast every week to track deal, pipeline, and forecast changes.

- Use **CRM-native snapshots** functionalities (e.g. snapshot reporting in Salesforce)
- Advanced forecasting **tools like Weflow** take snapshots automatically
- Consider moving data & snapshots to a **database** (BigQuery, Redshift): **disadvantage: doesn't sync back** to your CRM
- Spreadsheet** - duplicate tabs to track data; **disadvantage: doesn't sync back** to your CRM

Pacing

Use your snapshots to **display how you're pacing** against your quota target, hard commit & projection.



People: Your process and systems should make it easy for your people to forecast with accuracy.

Communicate benefits

Forecasting should not feel like something you impose on your revenue org. A good forecasting process **makes reps and managers more successful**, which should be well-communicated. Better forecasts start with better, data-driven pipeline management, which **eventually leads to a higher win rate as you gain deal visibility**.

From rep to CRO

Getting to an **accurate forecast is a team effort** by the entire revenue organization. Nevertheless, everyone from the individual rep to the CRO should be **accountable for their submissions** and part in the process. Create transparency by sharing your operating cadence, outlining each person's responsibilities.

Forecasting culture

Strategy eats culture for breakfast. While easier said than done, you need to work on a culture that enables accurate forecasts. **Communicating and showing the benefits** for everyone is a starting point, while an effective **operating cadence institutionalizes** desired behavior on a weekly/monthly basis.

Enablement

Implementing a forecasting process often means a new way of running revenue. Start by **clearly defining and communicating the process** from a conceptual level (i.e., how should they get to their final forecast call, step-by-step?). **Easy-to-use software** should enable your team to easily follow a data-driven approach to forecasting.



Weflow is an **advanced pipeline management & forecasting tool** that combines 50+ deal signals, AI insights, and efficient workflows to manage, inspect, and forecast your Salesforce pipeline. See how Weflow simplifies the submission process, rolls up forecast calls, and makes it easy to compare calls against quota, pipeline pacing, and AI prediction on [getweflow.com](#).

