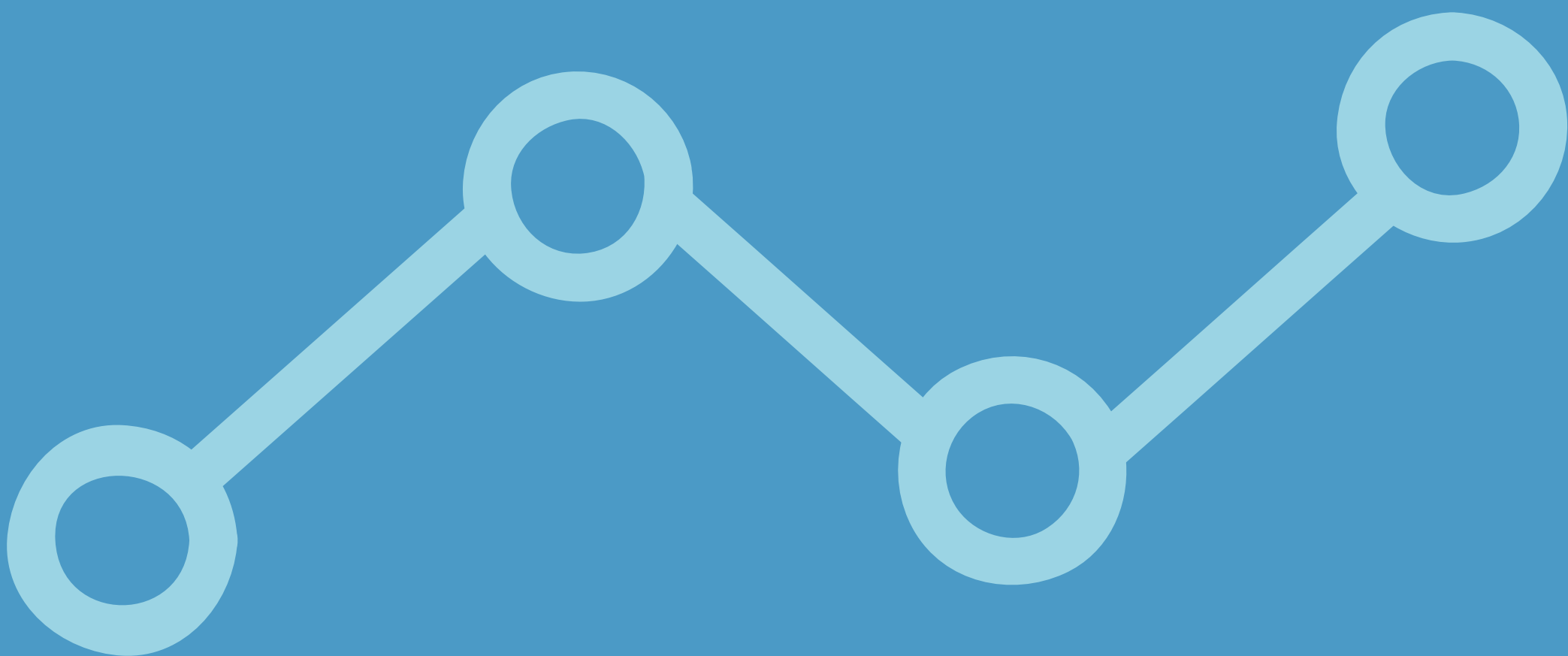


# A Buyer's Guide to Choosing the Right Sales Forecasting Software

9 considerations for evaluating and  
selecting the right forecasting provider  
for your business



# Finding the right provider for your business

## 9 considerations when evaluating and selecting a sales forecasting provider



### 1. Forecasting methods tailored to your business

No two businesses are the same. So why should they use the same forecasting method? A good forecasting software provider will have:

- Expertise around forecasting models
- Knowledge of which models or combinations of models are best suited to your business and data set (and they will be able to explain why)
- The ability to align these models to the success criteria of your business



### 2. Customisation capabilities

Businesses change, grow and mature. You need a provider who can evolve with you. Key questions to ask here include:

- Is the platform "out of the box" or can it be built around you and the processes you already have in place?
- Can the platform be customised as the business matures, as stakeholders become hungrier for data insights or as entire sales processes change?



### 3. Technical flexibility

Everyone uses Salesforce differently. You need a provider who can work around your unique CRM setup. An important question to ask here is whether you will need to code or write your own logic to customise the tool? Or will this be offered as part of the service?

Technical flexibility checklist:

- Custom objects and fields
- Cross object reporting
- Multiple currencies
- Multiple amount fields
- Opportunity types and record types
- Alternate sales processes
- Business segmentation leveraging certain fields and custom logic



### 4. System scope

A forecast doesn't exist without a sales machine and vice versa. Forecasting software that works in isolation isn't enough. Key questions to consider are:

- How does the provider help you develop and optimise the machine that fuels the forecast?
- How does the provider offer value, clarity and tools to optimise across your forecasting **and** funnel?



## 5. Custom reporting

- Pipeline and forecasts go hand in hand. What reporting and warning systems does the provider offer around pipeline?
- How does the provider help you visualise your forecast so it is easily digestible for key stakeholders across the business. Is this visualisation consistent across all stakeholders from salesperson to CEO?



## 6. Ability to segment

You probably want to forecast and manage your business by hierarchy, vertical etc. How can the provider prove that:

- their forecasting system works across all of those business segments?
- their forecasting system can maintain integrity across all of them?



## 7. Permissions

Each stakeholder has different requirements. A good forecasting platform will serve each stakeholder differently while keeping them aligned. Key question to ask:

- Does the platform have the ability to present the right numbers to the right people according to each stakeholder's needs?



## 8. Change management process

Any forecasting provider you choose should be experts in change management processes. When selecting a provider, ask them:

- What processes they follow or recommend for successful change management and why was it successful with other clients?
- Is the roadmap clear, are they asking for your desired outcomes, and are they aiming the project towards those desired outcomes?
- Do they recommend templates such as data dictionaries to ensure alignment across the business?



## 9. Best practice

The ideal sales forecasting provider will build a community of clients and will draw forecasting best practices from that pool of knowledge. Ask any potential forecasting provider:

- What best practices from other leading businesses they can share with you?
- How can you learn from those best practices and utilise them in your business?

# About Kluster

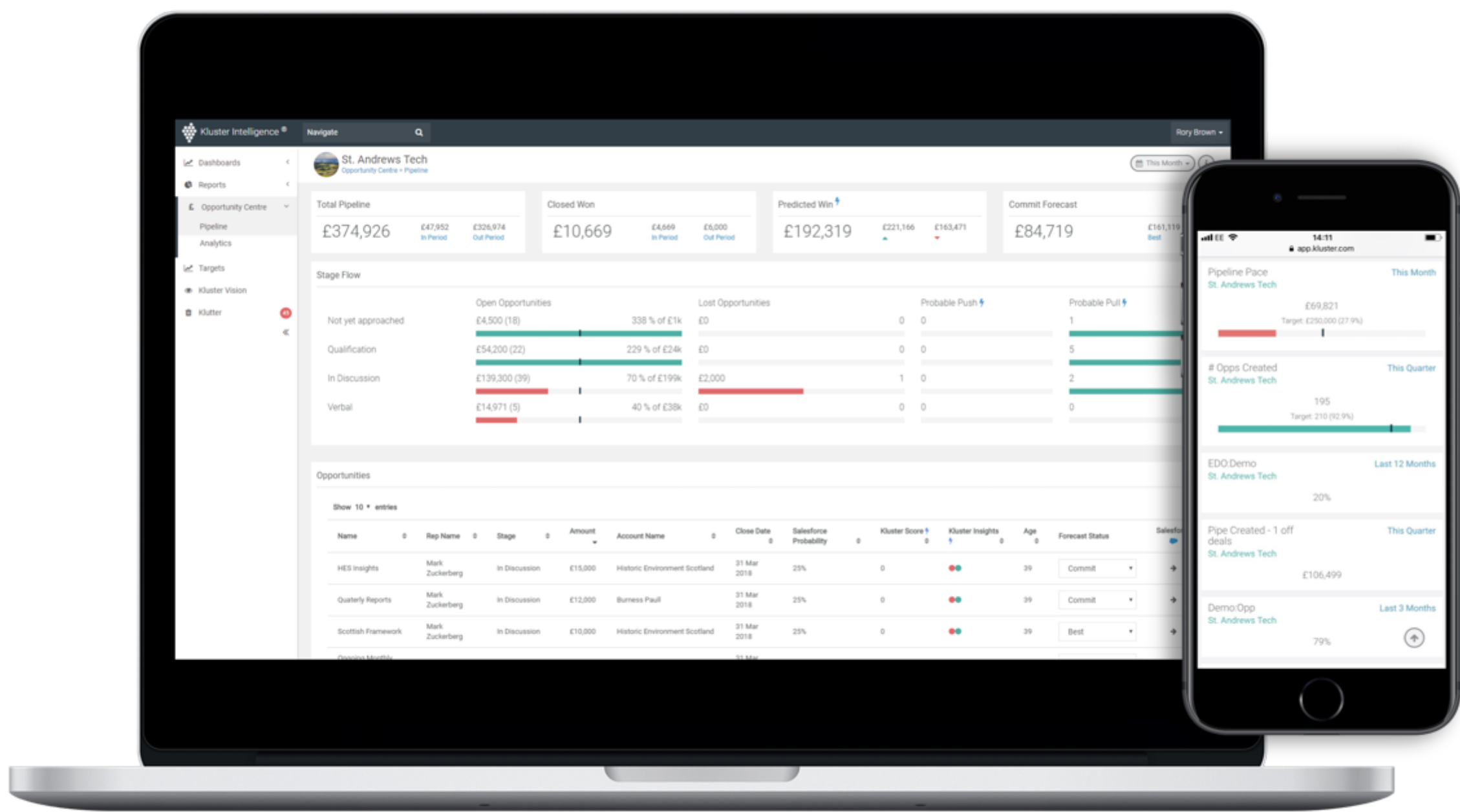
Revenue leaders struggle to trust the accuracy and visibility of sales forecasts. Our mission is to help revenue leaders optimise their sales machines and generate credible forecasts, so they can focus on doing what they do best: growing their businesses.

That's why we created Kluster, the flexible, end-to-end sales forecasting platform.

Our predictive early warning system surfaces unique data and enables revenue leaders to present accurate forecasts to the board, enable their teams effectively, and confidently make decisions that drive predictable growth.

## The outcome

Companies that use Kluster see an average 23.4% increase in revenue, 8.25% increase in deal value, and 16% reduction in sales cycle.



Request a demo

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