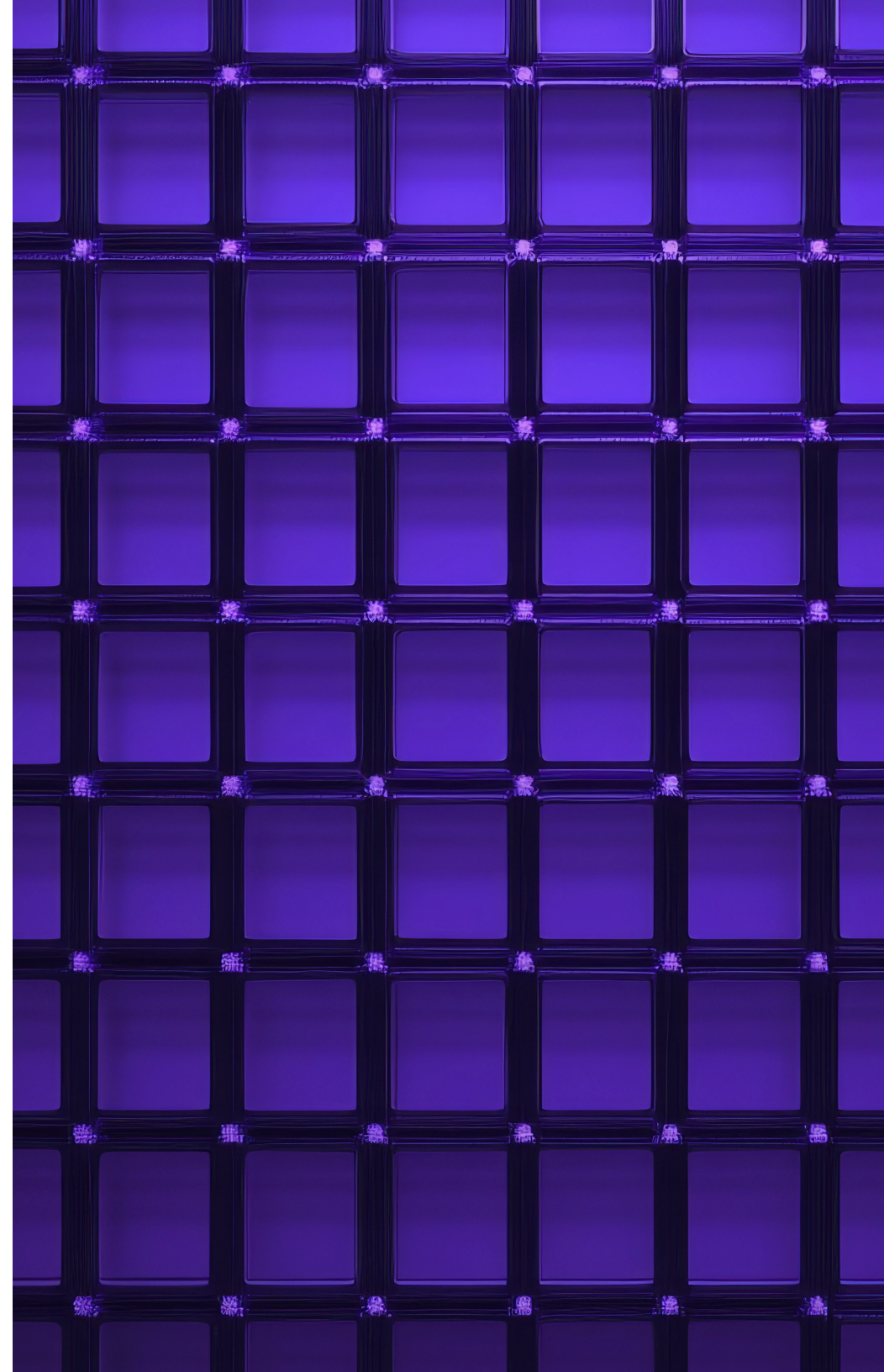


GUIDE

ELIMINATE DATA SILOS

The 4 elements of forecast
maturity



In revenue organizations, guesswork doesn't cut it

Sales forecasting isn't just an exercise in reporting. It informs revenue projections, helps allocate resources, and provides a clear roadmap for sustainable growth. But forecasting is not a one-size-fits-all process.

Early-stage businesses often rely on CRM data and manual spreadsheets, while more mature organizations implement AI-powered solutions to gain a precise, unbiased view of pipeline health. As companies evolve, so must their forecasting methodologies.

By refining how you forecast — through better data, processes, and systems — your organization gains accuracy, reduces busywork, and ensures long-term business viability.

In this guide, we'll outline the four core components of a truly mature forecasting practice and provide a roadmap to help you evolve your forecasting strategy.

The four elements of forecast maturity

To build a forecasting process that supports and informs growth, businesses must focus on these four key elements:

- 1 Technology and processes used to assemble the forecast
- 2 Revenue dimensions that organize and segment forecasts effectively
- 3 Data and analytics that drive accuracy, streamline reporting, and remove silos
- 4 Forecasting approaches that evolve with business needs

Each element is critical in building a reliable, scalable forecasting system.

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The technology and processes behind forecasting

Immature organizations rely on manual CRM roll-ups. As companies progress, they integrate future pipeline projections and algorithmic modeling. The most advanced businesses leverage AI-driven forecasting to automate insights and provide real-time, unbiased predictions.

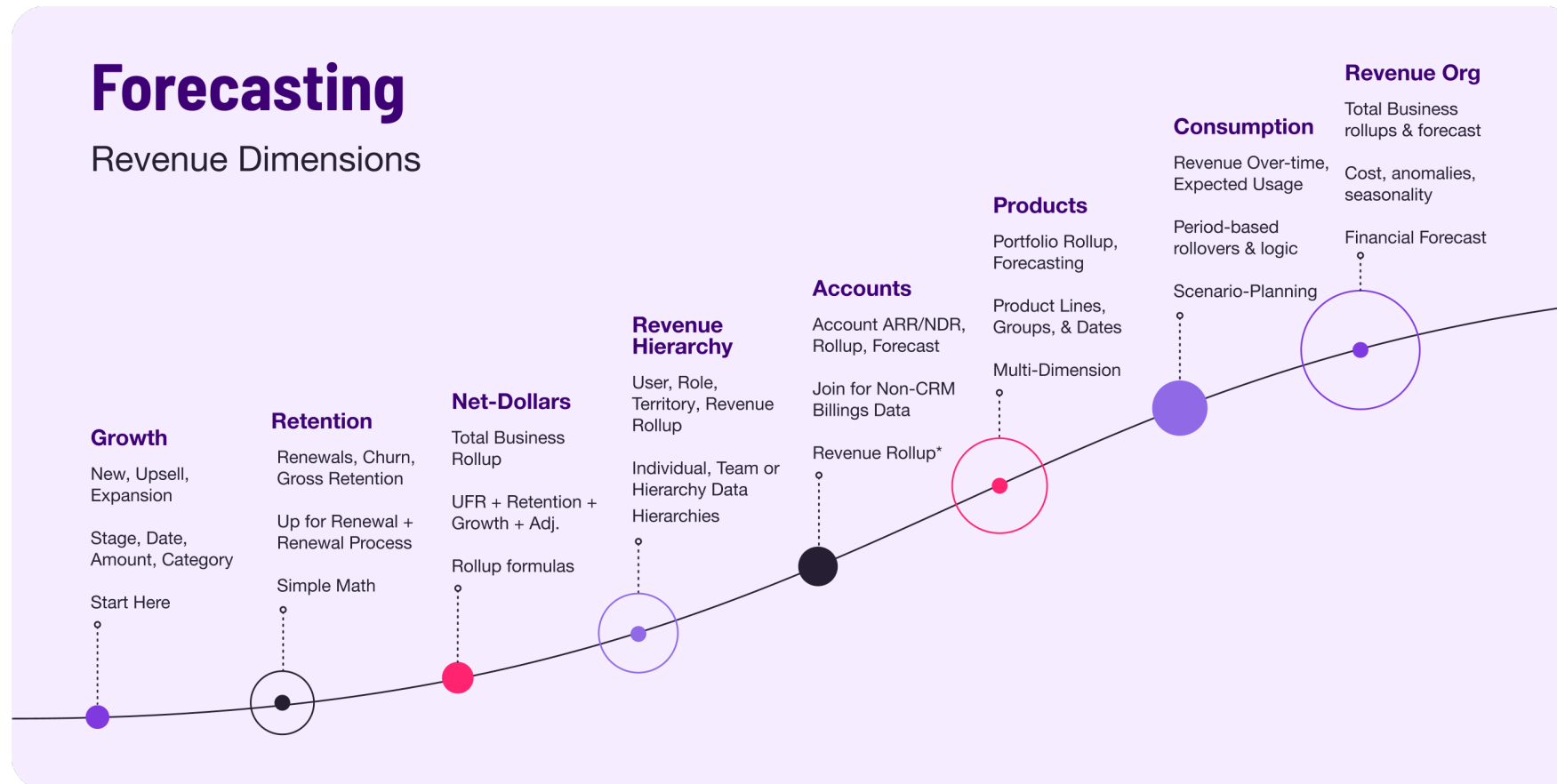
A mature forecasting practice starts with a solid technological foundation. The right tools and frameworks ensure that forecasting isn't just a best guess — it's an informed projection backed by data.

Furthermore, the technology and processes are the prerequisites for the next three elements of forecast maturity. Whether it's a CRM-based process, predictive analytics, or AI-guided forecasting, the tech stack is the backbone of forecast maturity.

Once you have your tech in place, who will follow the process? Sales reps, frontline managers, and even revenue leadership must all contribute to and rely on the forecast as a critical business tool.



Revenue dimensions: Structuring your forecast for success



A forecasting model is only as effective as the structure behind it. Revenue dimensions define how businesses organize accounts, pipeline, and revenue sources.

Without a structured approach, forecasts lack alignment across teams. Companies that only focus on net-new sales miss key revenue streams like renewals and expansions. Mature forecasting ensures total business roll-ups that align all revenue units under a single forecast view.

Changes in leadership (such as a new CRO, CFO, or CEO) or a business expansion often necessitate a more mature forecasting approach.

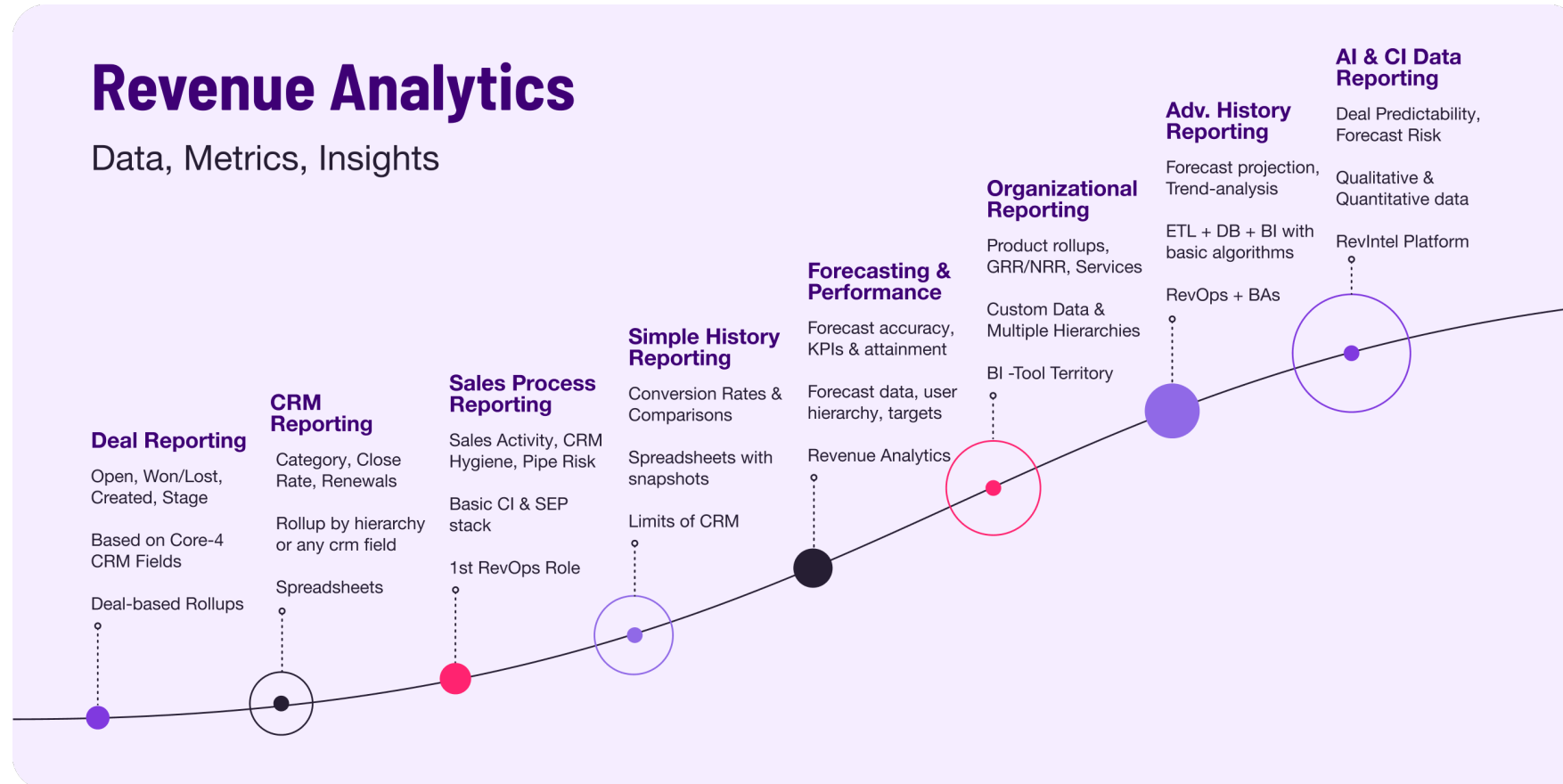
Growing businesses must adapt to include:

- **Renewals and expansions as core revenue contributors**
- **Pipeline generation strategies that align with leadership goals**
- **Cross-functional alignment across sales, product, and customer success**

Without these dimensions, businesses risk misalignment, missed revenue opportunities, and inaccurate forecasts.



Data and analytics: Eliminating silos for greater accuracy



Data quality is the single biggest factor in forecasting accuracy — and data silos often get in the way of accurate forecasts in the early stages of this maturity model.

Many early-stage companies rely solely on CRM data and manual roll-ups, which are error-prone and lack depth. Business intelligence solutions can help but don't provide real-time, actionable insights.

The more mature organizations understand that forecasting requires a mix of qualitative and quantitative insights and eventually AI-based conversation intelligence data reporting to remove any silos that stifle accuracy.

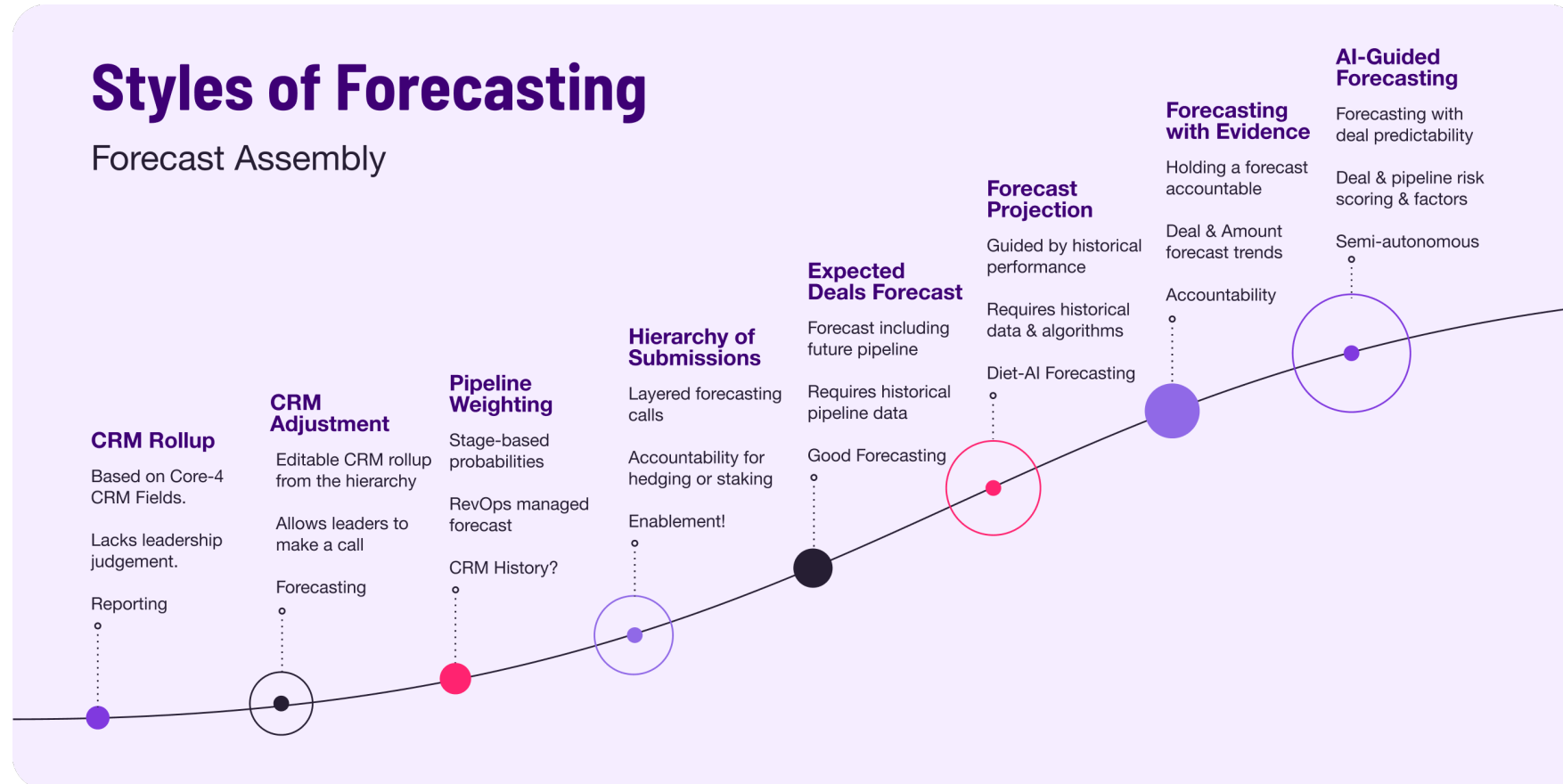
Mature organizations integrate data from multiple sources, including:

- **Sales activity tracking (calls, emails, meetings) to gauge deal health**
- **Conversation intelligence (CI) data to understand the context of what's happening throughout those sales activities**
- **AI-powered analytics that synthesize multiple data points into predictive insights**

With a revenue-aware system, sales teams no longer rely on intuition. Instead, they leverage AI-driven intelligence to forecast accurately, identify risks early, and act decisively.



Forecasting styles: How different approaches impact decision-making



Forecasting isn't just about the numbers — it's about how those numbers drive business decisions. Different forecasting methods enable different levels of leadership engagement and strategic planning.

CRM rollup forecasting offers basic pipeline aggregation but is prone to bias and inaccuracies.

Expected deals-based forecasting adds a layer of objectivity with historical pipeline data but lacks real-time insights.

Finally, **AI-guided forecasting** is the gold standard — a data-driven, objective system that continuously refines forecasts based on real-time deal data.

Each forecasting style influences leadership decision-making differently. Sales leadership needs clear, actionable insights to coach reps and allocate resources. CSMs and enablement teams drive forecasting alignment across customer-facing teams. RevOps wants to ensure data consistency and accuracy.

The more mature the forecasting approach, the more leadership can make informed, strategic decisions that drive predictable revenue growth.



The power of a single, unified forecast

Mature sales forecasting isn't just about predicting revenue — it's about creating a single, reliable source of truth for the entire business. A unified forecast enables:

- **A clear view of growth potential and optimal resource allocation**
- **Early identification of pipeline risks to take proactive action**
- **A scalable process that evolves with business expansion**

Gong Forecast delivers unbiased, AI-driven deal predictability that allows you to run your business with confidence. And with new advanced **Revenue Analytics**, you get a 360-degree view of your pipeline health, forecast accuracy, and actionable insights — all in one place.



Ready to learn how Gong can transform your operating rhythm? **Get an instant demo today.**

