From Gut-feel Forecasting to 95% Accuracy

How a B2B SaaS company transformed its forecast into something the board could trust.

95%
Forecast accuracy, three quarters running

~6 months
Sustained, embedded engagement

1 shared motion
Reinforced in 1:1s, deal reviews, and forecasts

THE CHALLENGE

Five products, multiple acquisitions, a global sales team assembled from assorted company backgrounds, no shared sales playbook, no commonly practiced methodology, and a forecast built mostly on gut feel. Not an easy starting point for a world-class private portfolio company and not a way to impress a seasoned board.

Reps were getting first meetings but no second dates. They would identify a prospect's broken toolset or need for workflow efficiency, then jump straight to the product features, without uncovering whether the business impact was big enough to justify a decision or budget priority.

The forecast suffered. It swung quarter to quarter, and the board could not always trust it. Deals stalled or were lost slowly to "no decision," not to competitors. Leadership knew the GTM strategy was sound, but somewhere between the conference room and the customer, it was breaking down and inconsistent from rep to rep.

The CRO was aligned from the start. The company needed a real enablement function, not a one-day workshop. He knew behavior change is a journey, not an event. We started with a Gap and Friction Analysis: conversations with the strongest reps and the newest BDRs, input from RevOps and channel partners, and a hard look at the marketing collateral and knowledge repositories that already existed across the products. That showed us where the motion was breaking and where the team had the biggest opportunity and desire to improve. Over two quarters, we built a standardized motion together, deliberately taking the time to coach, support, and reinforce the process rather than rushing a quick fix.

The foundation came first. We rebuilt the deal stages with real exit criteria, so deals couldn't advance on optimism, and anchored the team on a shared standard for qualifying, using MEDDPICC as a consistent way to answer why change, why now, why us, applied the same way by every rep.

WHAT MADE IT WORK

The standard only mattered because of how consistently it showed up. A shared language is easy to announce and easy to forget. What changed behavior was building it into the daily motion, so reps met it everywhere they worked:

- A deal sheet built into the CRM, so the qualifying questions lived in the tools reps used every day, not in a slide they forgot after kickoff.
- Deal reviews were conducted based on that sheet format. If those qualifying questions were not answered, the review call was staring at a blank deal sheet. It did not stay blank for long.
- The standard was reinforced in forecast calls, deal reviews, and one-on-ones, so reps saw it from every direction: tools, managers, and leadership.

Then came the coaching that changed rep behavior. Reps were treating end users who wanted a new tool as champions, and stopping at surface-level pain. We drilled past it, explaining that "I'd save three hours a day" is not business impact. The real question is what the business does with that time, why the end user's boss would care, and which company priority it ladders up to. That shift, from workflow complaints to measurable business impact, is what turned first meetings into second meetings.

The manager layer is where most rollouts fail and where the real work lives, where behavior change sticks or dies. As the CRO put it, "if the frontline leaders aren't pulling it through, it's never going to work." Managers were equipped with the rubrics and resources to reinforce the standard in every review, so it held after the enablement engagement ended.

THE RESULT

The forecast became something the board could trust.

Actuals landed within 95% of forecast for three consecutive quarters. The shared motion equalized reps of very different tenure and skill, cutting through the inconsistency that had made the pipeline impossible to read. The CRO presented those numbers to the board with confidence, on a platform where predictability had been the open question.

WHY IT WORKED

Two conditions made this the right answer. The fundamentals were sound: there was product-market fit and real pipeline, and deals were being lost to "no decision," not to competitors. The methodology fit because it matched the actual problem, not because it's a cure-all.

It worked because the person at the top wanted it to. The CRO didn't outsource the change and walk away. He sponsored it, amplified it, and held the line in his own deal reviews and forecast calls. A committed leader is the difference between a methodology that drifts and one that becomes how the team works, through reinforcement and accountability.

IN THE CLIENT'S WORDS

"A common language became the great normalizer. It let us cut through the differences in background, product knowledge, and skill, and forecast accurately." *- CRO, high-growth-stage portfolio company*

The strategy was already there. Now it is being executed consistently.

Seeing the same patterns in your field execution?
Let's start a conversation about how to get the field to consistently execute your strategy.
Schedule an exploratory call to talk about eliminating friction in your GTM motion.

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