

Research Plan: Forecasting Discovery

Study Type	Quantitative survey and qualitative interviews
Personas	Frontline managers, AE's, sales directors, sales VP's, sales ops, and internal CRO's
Segments	Variety across all segments
Participant Goals	Interviews: 5-7 / Survey: 35+
Stakeholders	PM and UXD

Research Goals

What does the team want to learn and/or walk away knowing?

- a. *Have confidence on which personas to focus on initially and whether to start with solving top-down OR bottoms-up - Bottom up approach with AE + Frontline Manager or Top Down with CRO?*
- b. *Have an initial set of designs/concepts tested with customers and have their feedback*
- c. *Have a recommendation for our initial concept to try and launch in Q1*
 - i. *+ Rough idea of future state beyond*
- d. *I hope we have an opinion on how much flexibility vs. prescriptive : tell me the number they need to have*
 - i. *Clarify what our customers will use and trust*
- e. *A detailed workflow of the steps that each persona takes in forecasting*
 - i. *Journey Map*
- f. *Identify how this works with existing platform*
- g. *How do we accommodate for different forecasting methodologies for the different sales segments for one sales team/customer?*

Assumptions

What do we assume to be true?

- a. *Customers will adopt a tool for forecasting and ditch their plethora of spreadsheets if we solve the right problems*

- b. *Customers are regularly meeting and updating their forecasts (most likely on a weekly cadence)*
- c. *Customers know how to calc run rate*

Personas

*Who should we be talking to for this research? Personas to focus on in **BOLD***

- a. *Frontline Managers + AE's***
 - i. *Validate what serves our front line managers and AEs who are on the ground level before moving up to higher leadership. Clari started from the top and moved down, which did not perform well with customers.*
- b. *Director of Sales***
- c. *VP of Sales***
- d. *SVP of Sales***
- e. *CRO (internal ask from Steve)***
- f. *Sales Ops (Support)***
 - *Segments - across the segments*

Methodology

To better understand how to help alleviate the pain points associated with the manual forecasting process today, UXR will survey and speak with Frontline Managers, AE's, Directors, VPs, and Sales Ops across various segments. We want to understand their expectations for a forecasting tool and where they expect a forecasting tool to live in the platform.

Survey

1. Do you perform sales forecasting as a part of your current role? (screener question)
 - a. No (screen out)
 - b. Yes
 - c. Unsure (screen out)
2. How often do you perform sales forecasting?
 - a. Daily
 - b. Weekly
 - c. Every two weeks
 - d. Monthly

- e. Quarterly
- f. Annually
- g. Something else: (open ended text box)

3. How often do you communicate sales forecasting data with your team?

- a. Daily
- b. Weekly
- c. Every two weeks
- d. Monthly
- e. Quarterly
- f. Annually
- g. Something else: (open ended text box)

4. Do you use spreadsheets to assist in your forecasting process?

- a. No
- b. Yes

5. What other tools do you use as part of your forecasting process? (open text box)

6. How far back does your historical sales data go?

- a. 1-2 quarters
- b. 3-4 quarters
- c. 1-2 years
- d. 3-5 years
- e. 6-10 years
- f. 10+ years
- g. Something else: (open text box)

7. Which forecasting method(s) do you use? (select all that apply)

- a. Length of sales cycle forecasting - Average length of sales cycle
- b. Lead driven forecasting - Assign value such as conversion
- c. Opportunity stage forecasting - Where is the deal in the pipeline
- d. Intuitive forecasting - How confident rep is deal will close
- e. Test market analysis - How well product sells in test group
- f. Individual rep performance - How well reps are doing
- g. Historical forecasting - How well reps have done in the past
- h. Something else: (open text box)

8. Do you calculate run rate as part of your forecasting process?
 - a. No
 - b. Yes
 - c. Unsure
9. If the platform were to automatically populate a forecasting score for the deals in your pipeline, what information would you expect to be included in this score? (open ended text box)
10. How confident would you be with this number? (rating scale question 1-10)
11. Which best describes your role?
 - a. Sales Development
 - b. Account Executive
 - c. Sales Operations
 - d. Sales Manager
 - e. Executive Leadership
 - f. Something else: (open text box)
12. How do you define success in your role? (select all that apply)
 - a. Booking a meeting with a prospect
 - b. Creating an opportunity
 - c. Upselling/renewals of existing customers
 - d. Closing a net new deal
 - e. Meeting team targets
 - f. Meeting quotas across all teams
 - g. Something else: (open text)
13. If you would like to be entered into the raffle for a \$20 Amazon gift card enter your email: (open ended text box)
14. Are you interested in speaking with the research team via a 30 minute Zoom call to discuss your forecasting process in more depth?
 - a. No
 - b. Yes

15. If yes, please provide your details below:

- a. Name and Email

Interview Guide

Thank you so much for scheduling time with us so we can better understand your needs and provide feedback on a design we'd like to show you. Our plan is to chat for about 30 minutes to understand how you use the platform today and your current sales forecasting workflow.

Can we record this conversation?

Do you have any questions before we get started?

Participant Name, Participant Company

General

1. Tell me about your role and how you define success in it?
2. How do you use the platform today?

Today's State

3. Tell me about the last time you worked on sales forecasting. Walk me through your process.
 - a. How often do you update your forecasts?
 - b. How often do you communicate forecasting data with your team?
 - c. What tools do you use in the forecasting process?
4. Do you calculate run rate as part of forecasting?
 - a. How do you calculate this?
 - b. What other calculations or data do you focus on?

Ideation

5. How do you picture us helping you with forecasting?
 - a. Which part of the forecasting process should we focus on first? Why?
 - b. Where would you expect this feature to be in the platform?
6. If the system were to automatically populate a score for the deals in your pipeline, how would you expect that to work?
 - a. What would you expect that to be called?
 - b. Where would you expect this score to be in the platform?

- c. How would you expect the system to calculate this number?
- d. How accurate would you expect this number to be percentage-wise?
- e. What information would you need to trust the accuracy of this score?

Wrap Up

- 7. What else would you like the team to know about forecasting?