

# Stop working on your forecast. Start getting answers from it.

You know the number. You need to know if you can hit it.

You're heading into the board meeting. The number dropped \$3M and you don't know why. Pipeline views and rep updates got you here - but you need answers you can defend.

The gap isn't effort. It's that nothing connects what's happening in the field to what it means for your forecast.

The screenshot displays the Salesforce Backstory interface. At the top, it shows the user 'Lydia Aminoff' and the account 'Apex - Upsell - FY27Q1'. The 'SalesAI Forecast Headlines' section includes four cards: 'Deal Risk' (\$416,700, HIGH), 'Deals stalling due to legal issues' (\$352,418, 3), 'Security compliance issues' (\$156,418, 2), and 'No executive engagement' (\$352,418, 3). Below this, a detailed view of the 'Apex - Upsell - FY27Q1' opportunity is shown, owned by Brian O'Neil, with an estimated total of \$324,304 and a close date of 04/13/2026. The deal risk is HIGH, and the predicted stage is 5 - NEGOTIATION. A table lists five opportunities with their annual values and estimated totals. A summary row shows a total of \$416,700. The interface also shows a 'Commit' amount of \$18,674,552 and a 'Total Amount' of \$71,900,000.

Opportunity	Annual Value	Estimated Total	Term	Product	Product Family
1 Apex - Upsell- FY27Q1	\$3,220	\$3,220		MobiTrack UEM Solutions	SAAS
2 Apex - Upsell- FY27Q1	\$61,321	\$61,321		Insightful Observability Suite	SAAS
3 Apex - Upsell- FY27Q1	\$15,068	\$15,068		CloudSync ESG Manager	SAAS
4 Apex - Upsell- FY27Q1	\$61,576	\$61,576		DataShield Protection Platfo...	GBSSRV
5 Apex - Upsell- FY27Q1	\$76,219	\$76,219		AI-Driven Analytics Hub	GBSSRV
SUM	\$416,700	\$416,700			

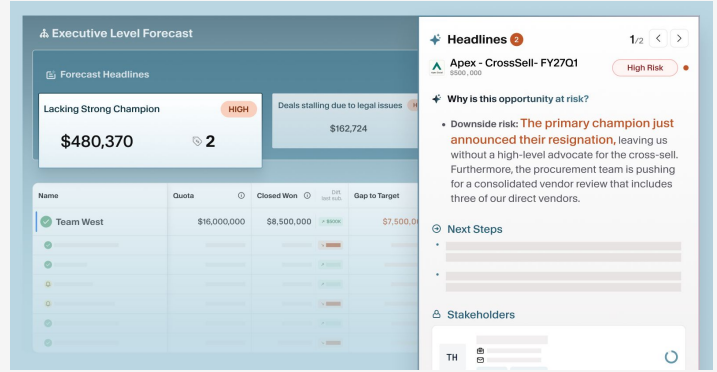
Sellers tell stories. Backstory gives you answers.

Every GTM activity gets captured automatically and powers every number in your forecast. What you're looking at reflects what's actually happening with buyers. From there, Backstory surfaces what's at risk, what's blocking it, and what to do about it - while there's still time to act. Walk into every forecast call with answers. Walk out with a number you can defend.

# How modern sales leaders forecast

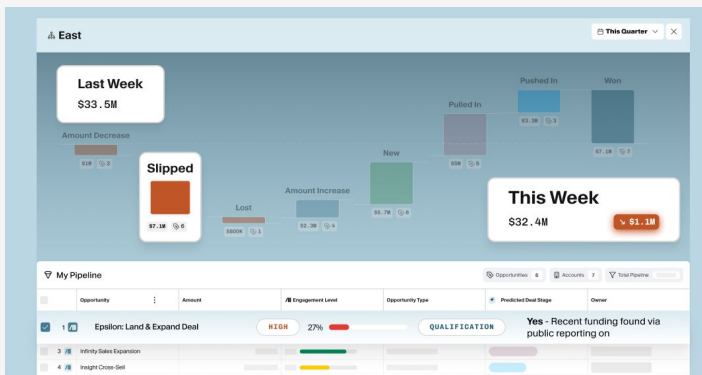
## Act on risk while there's still time

Commit category softening. Two reps with deals that haven't moved in three weeks. *Headlines* surfaces your top risk categories ranked by revenue impact - engagement gaps, stalled deals, missing stakeholders. Click any *Headline* to see which deals need attention and what to do. Get to the right deals in week two, with time to turn them around.



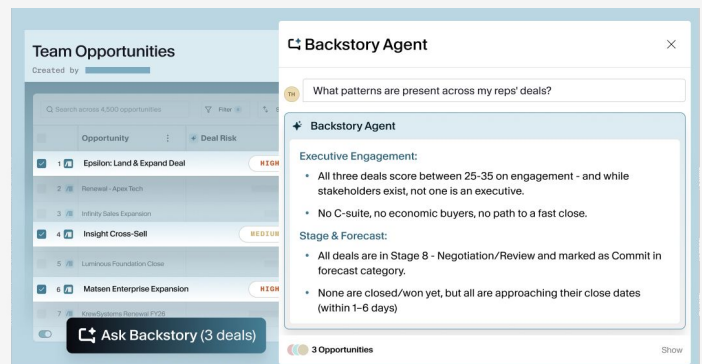
## Walk into every board meeting with the full story

The forecast dropped \$3M and the board wants to know why. *Waterfall Charts* shows exactly what changed - \$2M slipped, \$1M pushed indefinitely. *Headlines* flags engagement gaps in five deals. Drill in, see coaching plans already in motion. Walk in with the complete story and a clear action plan.



## Submit a number you can defend

Before you commit, confirm your high-confidence deals are as strong as they look. Select them with *Multi-Record Analysis*, and ask your Agent: "Are these deals as strong as they look?" and get a full evaluation with clear recommendations on where to shore up. Submit a number you can stand behind.



Andrew Brown

*"In high-performing sales teams, clarity is everything - visibility into activity, pipeline and execution is what fuels better decisions, faster course of correction, and more predictable outcomes."*

Senior Vice President and Chief Revenue Officer, Red Hat

