Sales Forecasting

ORACLE®

SALES CLOUD

Accurate sales forecasting enables sales leaders to make informed business decisions. Oracle sales cloud offers enterprise-level forecasting capabilities that help sales reps accurately estimate sales and give sales managers the information needed to project achievable sales revenue. Sales reps and sales managers can view, manage and submit real-time forecasts using desktop, tablet, or smartphone devices. Embedded analytics and custom reporting capabilities provide intelligence that sales teams can use to improve forecast accuracy.

KEY FEATURES

- Revenue and Unit-Based Forecasting
- Real-time forecast visibility
- Line and product-level adjustments
- Time period adjustments
- Formal submission process
- Change indicators
- Adjustment visibility
- Historical Snapshots
- Prebuilt reports with advanced visualizations
- 13 months of forecast trend data

KEY BENEFITS

- Get an accurate view of the entire business with real time forecasts
- Monitor key pipeline, forecast and quota ratios
- Track subordinate commitments through a formal forecast submission process
- Enhance sales performance through scheduled pipeline reviews and coaching sessions
- Identify seasonal trends with up to 13 months of historical forecast trends
- Leverage modern best practices and tailor forecasts to match business requirements

Forecast Anytime, Anywhere

Oracle Sales Cloud's easy-to-use forecasting tools are optimized for use on smartphones and tablets, allowing sales reps and sales managers to maintain accurate forecasts anywhere, anytime.
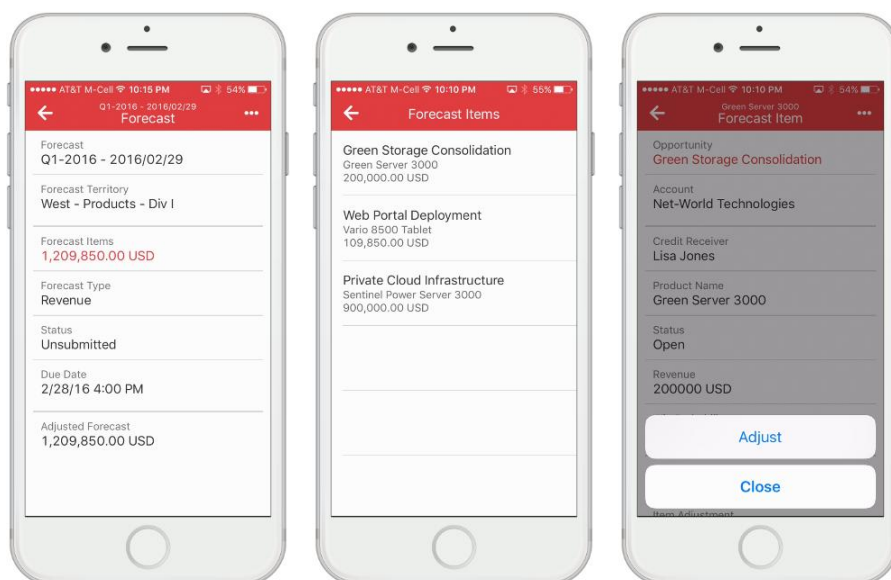

Image 1: View, submit, or adjust forecasts using the Oracle Sales Cloud Mobile app.

Gain Insights

Embedded, prebuilt reports display forecast details and comparisons in a simple, graphical format. Custom reporting capabilities offer expanded insights.

- Analyze forecast dollars next to won revenue and open pipeline by month.
- Compare projected forecast to target quota and pipeline revenue.

ORACLE®

- **Complete**: A comprehensive sales solution focused on driving performance and connecting business processes.

- **Innovative**: Productivity-driven apps offering deep customer insight with the flexibility to adapt and differentiate.

- **Proven**: Power global sales organizations and leverage recognized industry expertise for secure and scalable global operations.

RELATED PRODUCTS

- Oracle Sales Performance Management Cloud

- Oracle Incentive Compensation

- Oracle CPQ Cloud

- Oracle Marketing Cloud

- Oracle Service Cloud

- Oracle Commerce Cloud

- Oracle Social Network Cloud

- Oracle Transactional Business Intelligence Enterprise for CRM Cloud Service

- Review forecast items and open pipeline.
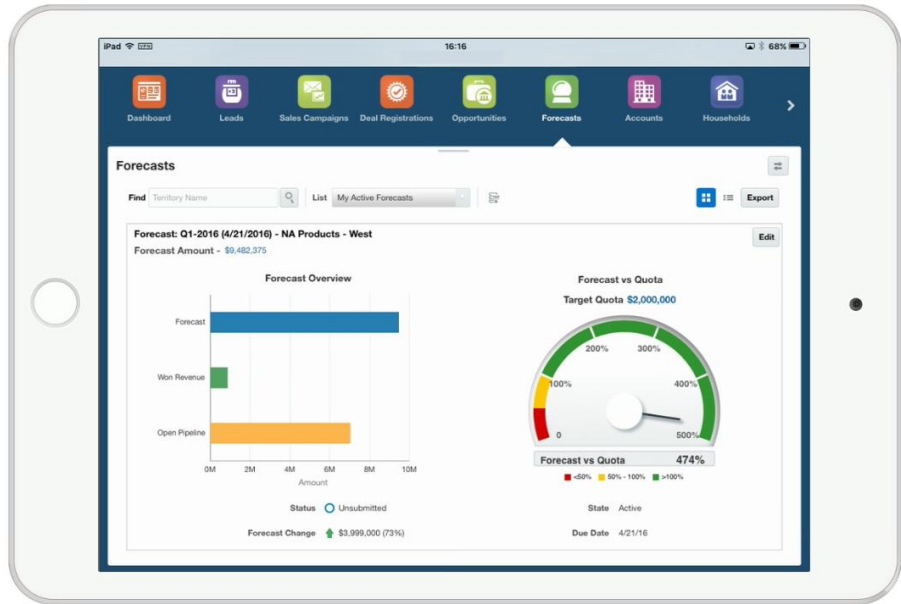- View forecast comparisons for each sales rep on the team.

Image 2: Sales reps and managers can see a quick snapshot of pipeline vs. forecast vs. quota.

Adjust for Accuracy

Sales managers and executives can view up-to-date forecasting data and can easily make adjustments to improve forecast accuracy.

- Adjust forecast values at an item level.
- Make adjustments to product or territory totals.

Forecast adjustments are clearly identified throughout the forecast hierarchy, allowing managers to quickly view the changes made by sales reps and managers on their team.

Image 3: Sales Managers can edit forecasts by forecast item.

Edit Forecast: Q1-2016 - NA Product... : Products   Actions ▼   Submit   Save   Save and Close   Cancel

Last Updated Won Revenue and Open Pipeline
1/25/16 11:44 AM

Territory Name   NA Products - West   Forecast $9,482,375.00
Territory Owner   Mateo Lopez   Won Revenue $876,000.00
Status   ○ Unsubmitted   Open Pipeline $7,023,375.00
Submission Window   2/5/16 - 4/21/16   Forecast Change   ▲ $3,999,000.00 (73%)

Forecast Q1-2016

☑ Exclude Rows with All Zero Values   Show   Forecast   Collapse All   Export

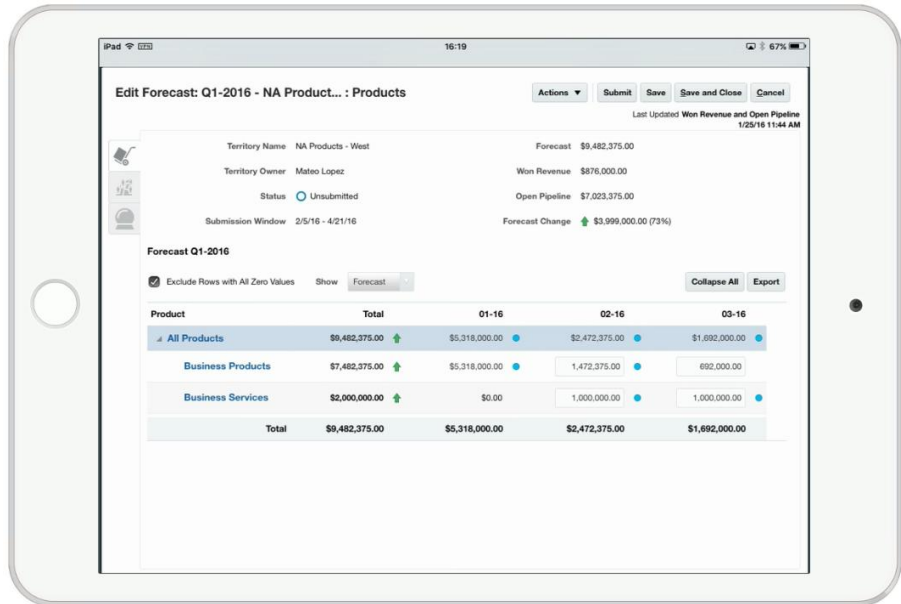| Product	Total	01-16	02-16	03-16
▲ All Products	$9,482,375.00 ▲	$5,318,000.00 ●	$2,472,375.00 ●	$1,692,000.00 ●
Business Products	$7,482,375.00 ▲	$5,318,000.00 ●	1,472,375.00 ●	692,000.00 ●
Business Services	$2,000,000.00 ▲	$0.00	1,000,000.00 ●	1,000,000.00 ●
Total	$9,482,375.00	$5,318,000.00	$2,472,375.00	$1,692,000.00

Image 4: Sales Managers can edit forecast totals by product.

Manage Sales Performance

Sales forecasting is fully integrated with Oracle Sales Cloud's sales performance management solution.

- Track performance by time and product or sales territory.
- Review projected quota attainment.
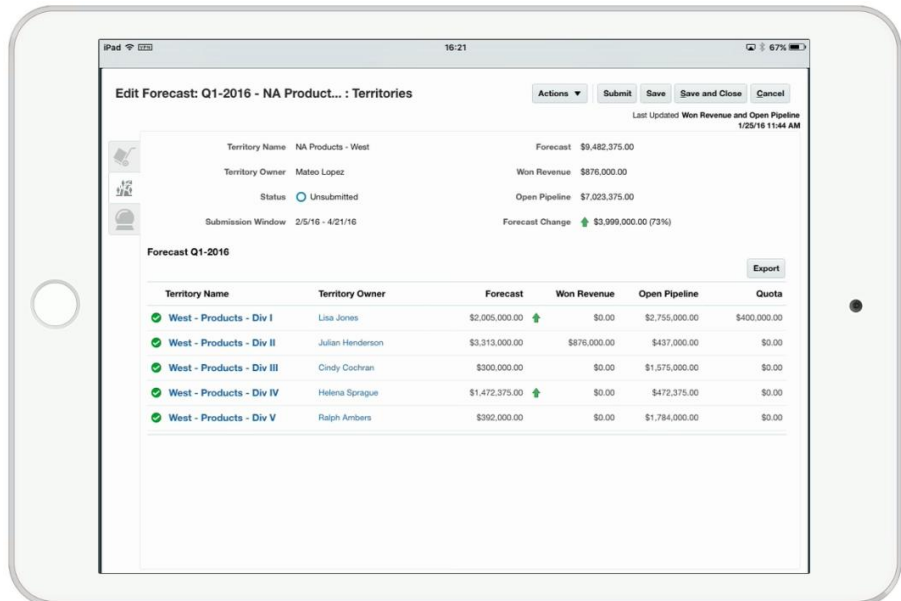- View forecast rollups by territory hierarchy.

Edit Forecast: Q1-2016 - NA Product... : Territories   Actions ▼   Submit   Save   Save and Close   Cancel

Last Updated Won Revenue and Open Pipeline
1/25/16 11:44 AM

Territory Name   NA Products - West   Forecast $9,482,375.00
Territory Owner   Mateo Lopez   Won Revenue $876,000.00
Status   ○ Unsubmitted   Open Pipeline $7,023,375.00
Submission Window   2/5/16 - 4/21/16   Forecast Change   ▲ $3,999,000.00 (73%)

Forecast Q1-2016   Export

Territory Name	Territory Owner	Forecast	Won Revenue	Open Pipeline	Quota
✓ West - Products - Div I	Lisa Jones	$2,005,000.00 ▲	$0.00	$2,755,000.00	$400,000.00
✓ West - Products - Div II	Julian Henderson	$3,313,000.00	$876,000.00	$437,000.00	$0.00
✓ West - Products - Div III	Cindy Cochran	$300,000.00	$0.00	$1,575,000.00	$0.00
✓ West - Products - Div IV	Helena Sprague	$1,472,375.00 ▲	$0.00	$472,375.00	$0.00
✓ West - Products - Div V	Ralph Ambers	$392,000.00	$0.00	$1,784,000.00	$0.00

Image 5: Sales managers can view forecasts by territory.

Gain Enterprise-Level Forecasting Capabilities

Built on an extensible framework, Oracle Sales Cloud offers a complete forecasting solution that is both robust and customizable to meet the unique needs of large enterprises. Capabilities include:

- Matrix rollups
- Revenue splits
- Overlay forecasts
- Custom fiscal years
- Delegated forecasting administration
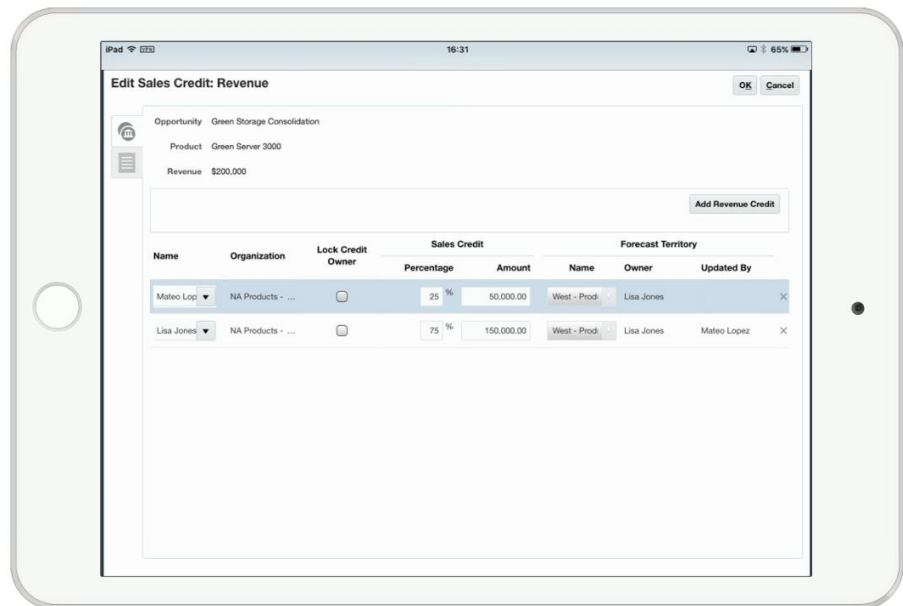- Formally scheduled forecasting submission windows

Image 6: Oracle sales cloud offers sales credit adjustments.

Oracle Sales Cloud offers easy-to-use tools that allow sales reps to create accurate forecasts and give managers the insights they need to make informed adjustments. Mobile forecasting capabilities and an array of forecasting options fit the needs of complicated sales forces and large enterprises.

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Integrated Cloud Applications & Platform Services

Oracle is committed to developing practices and products that help protect the environment