

# Sales Forecasting

**Epic:** Management Judgment

**User Story Title:** Make Forecasting Adjustments or Overrides

**Who?** Sales manager

**What?** Override my team's Forecast sales number at the aggregate level or the top level of account, opportunity or product

**Why?** To quickly ensure my forecast is accurate based on my judgment of my team's expected performance while maintaining the information provided by my sales representatives

**How?** Build a dashboard where all opportunities in my territory can be reviewed and can be adjusted as needed

**Description:**

As a sales manager, I want to override my team's Forecast sales number at the aggregate level or the top level of account, opportunity or product, so that I can quickly ensure my forecast is accurate based on my judgment of my team's expected performance while maintaining the information provided by my sales representatives.

I will know that this critical request is complete when I can use a dashboard where all opportunities in my territory can be reviewed and adjusted as needed, without changing the source of data (e.g. original opportunity information and details).

**Complexity Estimate:** Medium

**Level of Effort Estimate:** Low

**Sprint Cycle:** Sprint 1

**Sprint Points Assigned:** TBD

# Sales Forecasting

**Epic:** Management Review

**User Story Title:** Forecasting Summary Dashboard

**Who?** Sales manager

**What?** Review and drill down into the forecast

**Why?** To ensure that the forecasted commits are accurate and that my team has a feasible plan to achieve target

**How?** Build a dashboard that allows for review of high-level summary of forecasts as well as drill-down into individual details

**Description:**

As a sales manager, I want to review and drill down into the forecast, so that I can ensure that the forecasted commits are accurate and that my team has a feasible plan to achieve target.

This is a critical request, and I will know that it's achieved when I can review high-level summary and drill into details as needed, using one dashboard.

**Complexity Estimate:** Low

**Level of Effort Estimate:** Low

**Sprint Cycle:** Sprint 2

**Sprint Points Assigned:** TBD

# Sales Forecasting

**Epic:** Forecasting Accuracy

**User Story Title:** Snapshots and Comparison

**Who?** Sales manager

**What?** Capture weekly snapshots of the total forecast broken out by pipeline, bookings, product, and month for the remaining calendar year

**Why?** To compare period over period historical pacing based on a weekly point in time and have visibility required to guide sales managers on their plan to meet their sales target

**How?** Build a dashboard with total forecast broken out by pipeline, bookings, product, and month

**Description:**

As a sales operations team member, I want to capture weekly snapshots of the total forecast broken out by pipeline, bookings, product, and month for the remaining calendar year, so that I can compare period over period historical pacing based on a weekly point in time. This will provide me required visibility to guide sales managers on their plan to meet their target, including their overrides and adjustments numbers.

I will know that this critical request is achieved when I have the required visibility into forecasting opportunity details.

**Complexity Estimate:** Medium

**Level of Effort Estimate:** Medium

**Sprint Cycle:** Sprint 2

**Sprint Points Assigned:** TBD