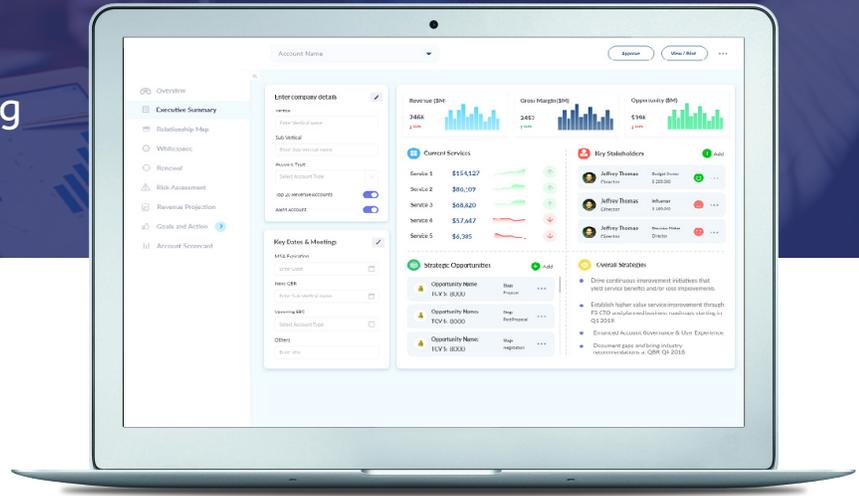


Account Plan Navigator

 ForecastEra

The End of Broken Sales Planning



Data-Driven Growth Planning & Forecasting Solutions for High-Performance Teams

Enterprise sales planning is broken.

Sales and finance leaders spend hours in spreadsheet and powerpoint hell manually producing and consolidating account plans that are supposed to bring clarity unity to sales organizations. Instead, they create massive visibility gaps that make it harder for:

- Sales reps to identify new revenue opportunities
- Sales leaders to prioritize sales strategies
- Sales operations/sales enablement teams to create unified sales plays and programs to support business goals

High performing sales organizations have mastered the ability to identify high-value opportunities and create roadmaps that align their products or services to their clients' and prospects' business goals.

ForecastEra is empowering more sales teams to achieve greater results with the world's first holistic application to power sustainable account revenue growth by digitizing previously analog data, providing unrivaled data analytics, and using AI to create actionable, prescriptive growth strategies.

51%

of companies surveyed by CSO Insights indicated they needed a better account planning tool

CSO Insights

45%

Only 45.6% of the surveyed companies produced revenue forecasts that were within 5% of actual revenue

KPMG

Modern Sales Planning for the Digital Enterprise

ForecastEra helps enterprise teams suffering from a lack of external insights, generic sales plays, and static account plans created in PowerPoint to operationalize their account planning efforts, make it a live document, improve sales productivity, and boost revenue growth a smarter way.



51% of enterprise organizations believe they need better account planning tools.

Source: CSO Insights

Forecastera Account Plan Navigator is the first SaaS application that tightly integrates CRMs, ERP systems, and operational models and applies artificial intelligence to extract meaningful, actionable insights in a fraction of the time as other sales planning methods. Account Plan Navigator gives sales leaders and their teams a comprehensive, on-demand, 360-degree view of all their key existing accounts and highest-value targets from anywhere.

Now, you can leverage real-time data and augmented intelligence to uncover white space and new revenue opportunities in your current accounts, identify previously hidden buying triggers, and create detailed guided selling actions to strengthen areas of weakness, transform the way you sell, and consistently hit your sales goals.

Predictability, Insights, and Double-Digit Growth

Account Plan Navigator Core Benefits

ACTIONABLE ACCOUNT INTELLIGENCE WITH CONTEXT

Build a 360-degree view of your customer, powering your account relationships and nurturing customers to improve retention. Breakdown inter-departmental barriers and data silos across the organization to uncover whitespace, gain new customer insights, identify buying triggers, and achieve transparent real-time intelligence that can grow accounts by as much as 25%.

INCREASED PRODUCTIVITY AND REPEATABILITY

Benchmark your current planning processes against business objectives to find the most direct, efficient, and effective path to more revenue. Monitor and analyze the most successful sales workflows and processes and deploy them as standard practice across your organization to improve sales productivity, efficiency, and effectiveness.



RELIABLE PREDICTABILITY

Replace outdated manual sales forecasts with digital ones that use automated data feeds and a unified database to create an easily accessible single source of truth. Aggregate territory and account plans across geography, products, or industries and use AI to score opportunities for dynamic, adaptable, and accurate forecasting.

RAPID CONFIGURATION & DEPLOYMENT

Account Plan Navigator is an easy-to-deploy, configurable Salesforce app you can launch with little or no IT intervention. ForecastEra solutions combine software integration best practices with a configurable platform specifically built for agile implementations. Begin your business transformation sooner and dramatically reduce time to value.

Powerful Features for Powerful Results

Account Plan Navigator Key Features

Account Navigator is a feature-rich, unique sales planning platform that delivers unrivaled transparency, intelligence, and performance

ROBUST REAL-TIME ANALYTICS

Get a complete, current snapshot of any part of your business on-demand. Slice and dice your enterprise's internal sales and revenue data to identify inefficiencies and revenue gaps, adapt strategies to meet quarterly targets, and see real-time translation of pipeline to sales and revenue forecasts. Easily configure dashboards for real-

time reports on everything from win/loss rates and pipeline velocity to sales forecasts and productivity scorecards.

DYNAMIC FORECASTING

Don't just revisit projected versus actual sales productivity and revenue each quarter. Account Plan Navigator's dynamic forecasting continually updates forecasts as new account or external data is available. Use dynamic forecasting to get an accurate point-in-time snapshot comparing your current sales results with quarterly or annual goals and take immediate corrective action for reps or accounts that are underperforming.

RELATIONSHIP MAPPING

Identify key decision makers, influencers, and blockers with Account Plan Navigator's proprietary relationship mapping tool. Highlight key interpersonal relationships in customer or prospect accounts to prioritize conversations and outreach. Distinguish customer contacts with budget authority, strong purchasing influence, and verifiable positive interactions with your team to quickly assemble a visual organizational chart that helps your team navigate complex sales processes with ease.

Account Plan Navigator Features At-A-Glance

- Executive Summary
- Relationship Maps
- Risk Assessment
- White Space Summary
- Portfolio Analytics
- Territory Planning
- AI-based Market Intelligence
- Pre-defined Sales Goals and Actions
- Competitive Assessments
- What-if Simulation

ACCOUNT RISK ASSESSMENTS

Understand your stakeholder relationships in each account and use ForecastEra's Risk Scoring Model to proactively identify accounts in need of immediate attention. Compare your in-account products with competitors's offerings to identify previously hidden risks of churn while mapping your products to other business drivers and uncovering new sales opportunities in the white space.

GUIDED SELLING

Success leaves clues. Analyze your most successful sales efforts and build prescriptive, repeatable sales plays for your entire organization. Augment internal data with curated access to over 75 million news media feeds and social intelligence, and apply AI to effortlessly create a targeted, effective sales plan specifically for each account. Define and prioritize specific tasks, and the strongest sales support content to simplify selling and improve productivity.

Potential results with Account Plan Navigator

70%

improvement in adoption of account planning

50%+

faster account planning

26%

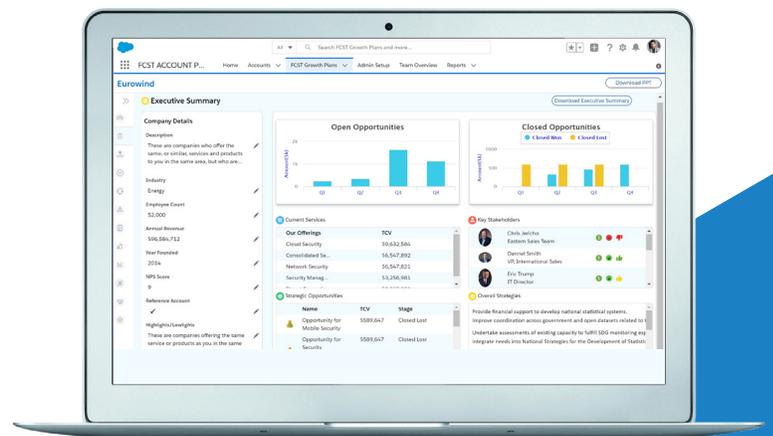
shorter sales cycles

25%

more accurate forecasting

25%

increase in account growth



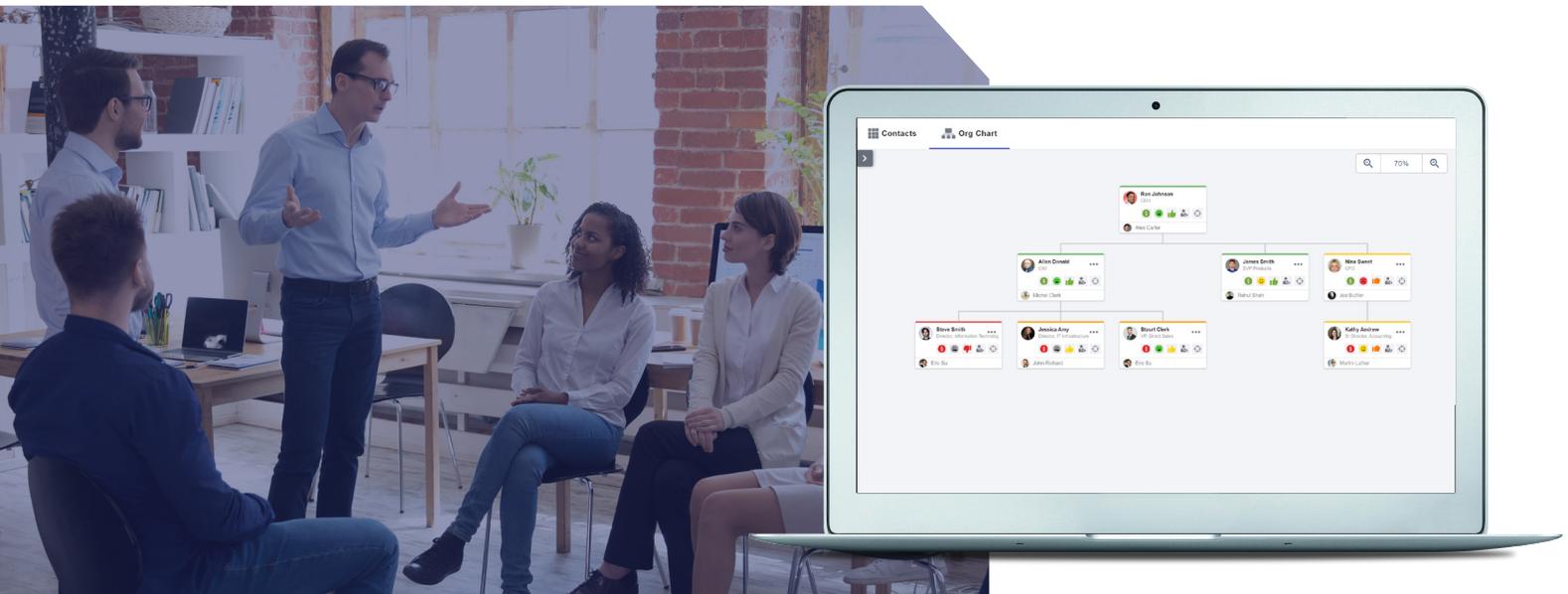


Mercer started using ForecastEra Account Plan Navigator for over 4,000 users. After the first year, based on the analysis, accounts that used applications for account planning had higher revenue growth compared to the ones that did not."

Mercer Customer Contact

Achieving the highest levels of account growth and sales excellence demands a new approach — a combination of robust account planning methodology, external intelligence, advanced analytics, organizational engagement, strategic thinking, and operational discipline.

Trusted by



Visit www.forecastera.com for more information or contact us directly to schedule a free personalized demo.