



Sales Coach Series

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Effective forecasting

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The Dilemma

You are explaining to your manager that a forecasted order has slipped again. It was definite for Christmas, then it moved to January. Now it's February.

The Coaching

Improving forecasting accuracy means asking the right questions combined with a heavy dose of reality!

'We'd like to do something by Christmas' is too frequently interpreted by the salesperson as 'It must be live by Christmas. That means an order in November'. The customer actually meant 'We'd like to choose the supplier by Christmas but there are other issues we need to factor into the roll-out'. Now it's February. You are under pressure and your agitation is irritating the customer.

Moving goalposts are a fact of life for everyone but the following will ensure you're kept in the loop!

1. Ask the right questions - and don't filter what you hear. Find out timescales, milestones, deadlines, driving factors, external influences and, crucially, the impact on the **business** if timescales are not met.
2. Ask these questions of the right people they need to be sufficiently 'hooked in' to know the answers and understand the implications
3. Understand the customer's business. Customers appreciate salespeople who are interested in understanding their pressures, priorities, opportunities and constraints. This nurtures mutual trust and facilitates information sharing.

This approach would have meant forecasting the business for February and, although you might have wanted the order in November, at least you and your boss would have known you were in control!

Quick Tips

1. Ask questions - and listen to the answers
2. Ask the people who know the answers
3. Build closer relationships with your customers to encourage open dialogue