THE 3 PRESALES DATA POINTS TO BRING TO YOUR CRO'S ATTENTION

The best presales leaders bring three Presales Data Points to their CRO's attention during sales forecast calls. Learn about what they are and how they help you earn your seat at the table.

SALES FORECAST CALLS

Sales forecast calls are designed to update and inform your sales leadership about:

- What is going to close and when?
- Will we be over our revenue target (and if so, where are our risks)?
- Will we fall short (and if so, what can we do to make up the gap)?

On every forecast call, the sales team contributes four core Sales Data Points about every deal:

1. Opportunity Stage: Where is the deal in our sales pipeline?
2. Deal Size: What is the revenue potential of this deal?
3. Close Date: When is the deal expected to close?
4. Forecast Category: How confident are you in this deal closing (e.g. Commit, Best Case, Pipeline)?

With this sales data, CROs run through various revenue scenarios to try and predict upcoming performance.

Historically presales teams have been excluded from forecast calls with the thinking "What could presales contribute that my AEs don't already know?".

Using modern presales management solutions, like Homerun Presales, presales teams are now generating new and varied Presales Data through their regular day-to-day activities.

As a result, presales teams have extremely valuable data that no one else has, but everyone wants.

Bring these three Presales Data Points to your CRO to earn your seat at the 'sales forecast' table.

#1 ➜ PRESALES WARNING SIGNS

Presales warning signs can take multiple forms, but they are how a presales team raises their

hand and says "We are concerned about this deal!".

Common Examples:

- Presales Sentiment = Concerned
- 1+ Product Gap / Feature Request Blocker
- 1+ Evaluation Plan Blocker (we are stuck on a step in our process or failing test/use cases in a POC/POV)

Your CRO will sit up and lean forward the moment you start sharing a Presales Report that shows all deals that are in Commit, but have at least one Presales Warning Sign.

Once seen, your CRO will never be able to live without this information.

#2 ➔ PRESALES STAGE

The Presales Stage is the presales equivalent to the sales stage, but from a presales perspective.

Suppose that you are told that a key deal is in Salesforce's standard Stage 3, which is 'Demo or meeting'.

What does that really tell you and your sales leadership about this deal? Not much. Immediately you wonder:

- Did we already do a demo?
- Are we doing another one?
- Are we building a custom demo?
- What kind of meetings are we having?
- Are we doing an onsite workshop?
- Are we doing a POC or POV?

Your Presales Stages can give you this status.

#3 ➔ TECHNICAL WIN

When defined and used properly, the Technical Win can be a key signal about your product's technical-goodness-of-fit to meet your prospect's needs.

- Did we have the required features?
- Were there any documented product gaps?
- Did we satisfy the POC/POV test/use cases with demonstrated success?

If you do not know, then you do not yet have the Technical Win (and the deal should not be in Commit!).

ABOUT HOMERUN PRESALES

Homerun Presales is the presales workspace that gets you through your day with one place to track, manage, organize, and inform your presales efforts.

High performing presales teams such as Demostack, AppViewX, Graylog, Cortex, INKY, JupiterOne and others use Homerun to:

- Increase in deal win rates (20%)
- Decrease sales cycle durations (15%)
- Avoid wasted time (8 hours per sales engineer per week)
- Reduce time-to-productivity for new hires (4 weeks)

Homerun integrates with Salesforce, HubSpot, Consensus, Jira, Slack, and other sales tech stack applications to keep your data and teams in sync.