



SOLUTION SPOTLIGHT

State of the Art Sales Forecasting

Sviatoslav Lobach

Product Leader, Creatio

Creatio

How the Technology Landscape is changing



1. Consolidation around AI-native platforms covering revenue related processes E2E.
2. The average B2B sales technology stack includes 15 tools on average, the need to simplify seller workflows.
3. Forecasting is becoming part of a broader revenue intelligence layer.
4. Unified customer context is essential for AI driven forecasting.

Why Forecasting Matters Now



1. **Forecasting** is moving from static reporting to an AI-assisted revenue control system.
2. **Data-driven shift:** Gartner says 65% of B2B sales organizations will move from intuition-based to data-driven decision-making by 2026.
3. **Buyer complexity:** Forrester says the typical B2B buying decision now includes 13 internal stakeholders and nine external influencers.
4. **Revenue implication:** Forecasting must combine pipeline data, activity signals, seller judgment, and AI guidance earlier in the cycle.

“Generational buying shifts, combined with the rapid rise of generative AI, are fundamentally altering the B2B buying landscape.” — Sharyn Leaver, Forrester

INFOGRAPHIC

What Happens When The Forecast is Wrong

When you're under the forecast...

- ✗ Lower investor confidence
- ✗ Cash flow impact
- ✗ Missed or delayed bonuses
- ✗ Lost employee morale
- ✗ Drop in stock prices

When you're over the forecast...

- ✓ Not enough inventory
- ✓ Downstream crush on post sale teams
- ✓ Overconfidence in next quarter forecast
- ✓ Lost executive team credibility
- ✓ Missed opportunity to allocate spending



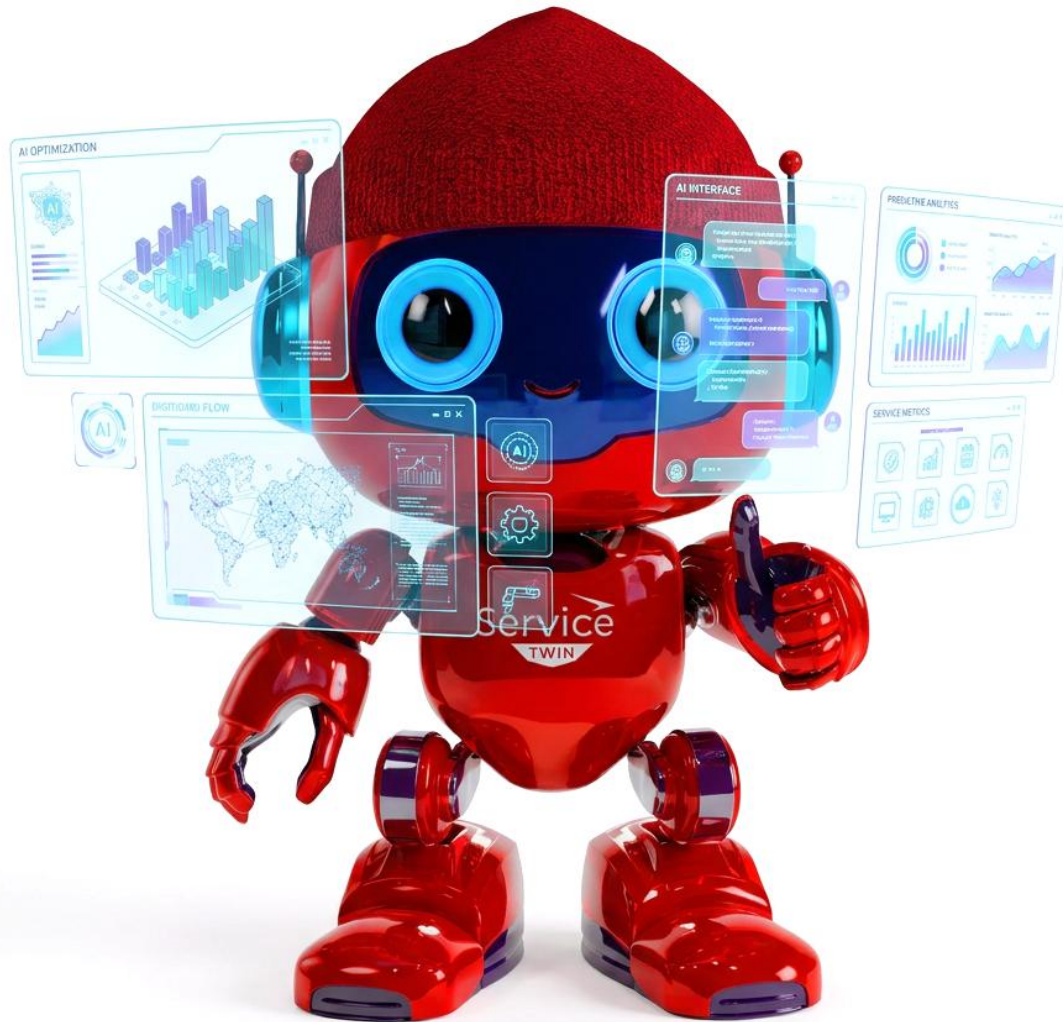
Creatio Sales Forecasting & Related Functionality

Forecasting Core:

- Forecasting Section with team hierarchies, rollups, and submission
- Pipeline Inspection and Forecasting reports:
 - Pipeline Waterfall
 - Pipeline Evolution
 - Forecasting Pulse
- Individual Deal Health, Scoring and Inspection
- AI Forecasting and Deal Inspection Agents
- Mobile Ready Forecasting

Supporting Features:

- Opportunity Scorecards (MEDDPICC)
- Relationship Chart and Intelligence
- Email & Calendar Sync & Capture
- MS Teams & Zoom Meetings Capture and Summaries
- Historical Fields Changes Tracking and Audit



AI Agents to drive accurate forecasting

- AI Forecast Submission and Inspection Agent
- Pipeline Health Inspector
- Revenue Scenario Planner
- Deal Risk Sentinel
- MEDDPICC Helper and Validator
- Relationship Intelligence Agent
- Meeting Summary & Knowledge Agent
- Next Best Action Agent
- Forecast Cadence Orchestrator

Forecasting Section

- Review Key Numbers by Sales Teams and Individual Sellers
- Instantly dive into Opportunities behind these numbers

Forecast management

United States x Q3 2025 x Filter

Name	Quota	Booked	Gap	Forecast Call	Mani
Sam Smith United States	\$16,000,000	\$8,500,000	\$7,500,000	\$15,000,000	\$25,000,000
Ben Brown Northeast US	\$4,000,000	\$2,000,000	\$2,000,000	\$3,500,000	\$5,000,000
Max Miller Midwest US	\$4,000,000	\$1,500,000	\$2,500,000	\$3,000,000	\$5,000,000
Jack White South US	\$3,500,000	\$2,000,000	\$1,500,000	\$4,000,000	\$5,000,000
Alex Moore West US	\$4,000,000	\$2,500,000	\$1,500,000	\$4,000,000	\$5,000,000
Sam Smith Direct US	\$500,000	\$500,000	\$0	\$500,000	\$1,000,000

Opportunities

Opportunity name	Stage	In/out forecast	Owner	Opportunity amount	Territory	Close
003 / Axiom / Package	Closed Won	✓	Alex Moore	\$2,500,000	Los Angeles	07/10/2025
079 / Nelson / Package	Contracting	✓	Jack White	\$2,000,000	San Francisco	09/09/2025
407 / Feature IT / Sale	Qualification	✓	Max Miller	\$1,200,000	Seattle	09/25/2025
512 / Orion / Package	Closed Won	✓	Sarah Lee	\$1,500,000	New York	08/10/2025
213 / Atlas / Sale	Closed Won	✓	Sam Smith	\$500,000	San Francisco	07/11/2025

Additional details

Commit: \$10,000,000 | Forecast Call: \$16,000,000

Gap To Go: \$7,500,000 | Team Quota: 42%

Submission history

My Forecast Call (blue line), Team's commit (red line), New business quota (green line)

My last submission

Forecast call value increased by \$500K
USD \$15,500,000 to USD \$16,000,000
Updated: 09/01/2025

Notes: Performance at 53% of quota; two late-stage enterprise deals could add \$6M. Main risk: delayed manufacturing sector closures.

Forecasting Section

- Interact with Creatio.ai to challenge each number and Opportunity

Name	Quota	Booked	Gap
Sam Smith (United States)	\$16,000,000	\$8,500,000	\$7,500,000
Ben Brown (Northeast US)	\$4,000,000	\$2,000,000	\$2,000,000
Max Miller (Midwest US)	\$4,000,000	\$1,500,000	\$2,500,000
Jack White (South US)	\$3,500,000	\$2,000,000	\$1,500,000
Alex Moore (West US)	\$4,000,000	\$2,500,000	\$1,500,000
Sam Smith (Direct US)	\$500,000	\$500,000	\$0

Opportunity name	Stage	In/out forecast	Owner	Opportunity amount
003 / Axiom / Package	Closed Won	✓	Alex Moore	\$2,500,000
079 / Nelson / Package	Contracting	✓	Jack White	\$2,000,000
407 / Feature IT / Sale	Qualification	✓	Max Miller	\$1,200,000
512 / Orion / Package	Closed Won	✓	Sarah Lee	\$1,500,000
213 / Atlas / Sale	Closed Won	✓	Sam Smith	\$500,000

AI Forecast Call Explanation

Forecast management agent

I'm preparing a summary of the AI forecast call explanation for your opportunities, including key patterns where AI and sales rep forecasts differ. This process may take a few moments—please wait while I gather the latest insights. I'll provide you with a concise breakdown and examples as soon as the data is ready.

AI Forecast Call Explanation Summary

- Total opportunities with forecast discrepancies: 44
- Total opportunity amount: \$1,741,855.88

Key Patterns from AI Insights

The main reason for discrepancies between sales rep and AI forecasts is that AI downgrades opportunities when there are clear gaps in buying signals, stakeholder engagement, qualification, or persistent risks. While sales reps may commit deals based on pipeline progression, the AI highlights blockers such as missing economic buyer validation, weak customer urgency, lack of defined decision process, or significant competitive threats. When positive momentum or strong qualification signals are missing, AI tends to assign a more conservative forecast.

Representative Opportunity Examples

- 441 / Water catchment / FlashNet Development, Reynaldo Moates — \$250,000, Contracting
Insight: If engagement and MEDDPIC elements improve, closure is possible this quarter, but for now, AI recommends downgrading from Commit to Best Case.
- 1183 / Solar panels / UrbanEdge Properties — \$35,416.67, Negotiations
Insight: Persistent open risks—such as lack of executive buy-in and undefined processes—lead AI to set this as Best Case, not Commit.
- 1187 / Solar panels / UrbanEdge Properties — \$18,181.82, At risk
Insight: Major blockers are present: missing buyer, unstructured process, no urgency, and strong competitor; AI does not support Commit.
- 1204 / Solar panels / UrbanEdge Properties — \$1,585, Proposal
Insight: Blockers include missing buyer engagement and unclear need/timeline—AI assigns Pipeline, not Commit.
- 1182 / Solar panels / UrbanEdge Properties — \$18,181.82, Engagement
Insight: Medium/high risks remain; positive interest but not enough certainty for a confident Commit.

Next Step

Would you like a detailed breakdown for a specific opportunity or further recommendations on these forecast calls?

Forecasting Section

- Update Opportunities and Submit Forecasts with confidence from a single view according to corresponding Forecasting Cadence

The screenshot displays the 'Forecast management' interface in Creatio. A 'Quick Submission' modal dialog is open, showing the following data:

Quota	Booked	Gap to Go	Commit
\$16,000,000	\$8,500,000	\$7,500,000	\$10,000,000

The background interface shows a table of forecast data for 'United States' in 'Q3 2025'. The table includes columns for Name, Quota, Booked, Gap to go, Forecast call, AI Forecast Call, and Man. Below the table, there is an 'Opportunities' section with a table of sales opportunities.

Opportunity name	Stage	In/out forecast	Owner	Opportunity amount	Territory	Close
003 / Axiom / Package	Closed Won	✓	Alex Moore	\$2,500,000	Los Angeles	07/10/2025
079 / Nelson / Package	Contracting	✓	Jack White	\$2,000,000	San Francisco	09/09/2025
407 / Feature IT / Sale	Qualification	✓	Max Miller	\$1,200,000	Seattle	09/25/2025
512 / Orion / Package	Closed Won	✓	Sarah Lee	\$1,500,000	New York	08/10/2025
213 / Atlas / Sale	Closed Won	✓	Sam Smith	\$500,000	San Francisco	07/11/2025

Additional details on the right side of the interface include:

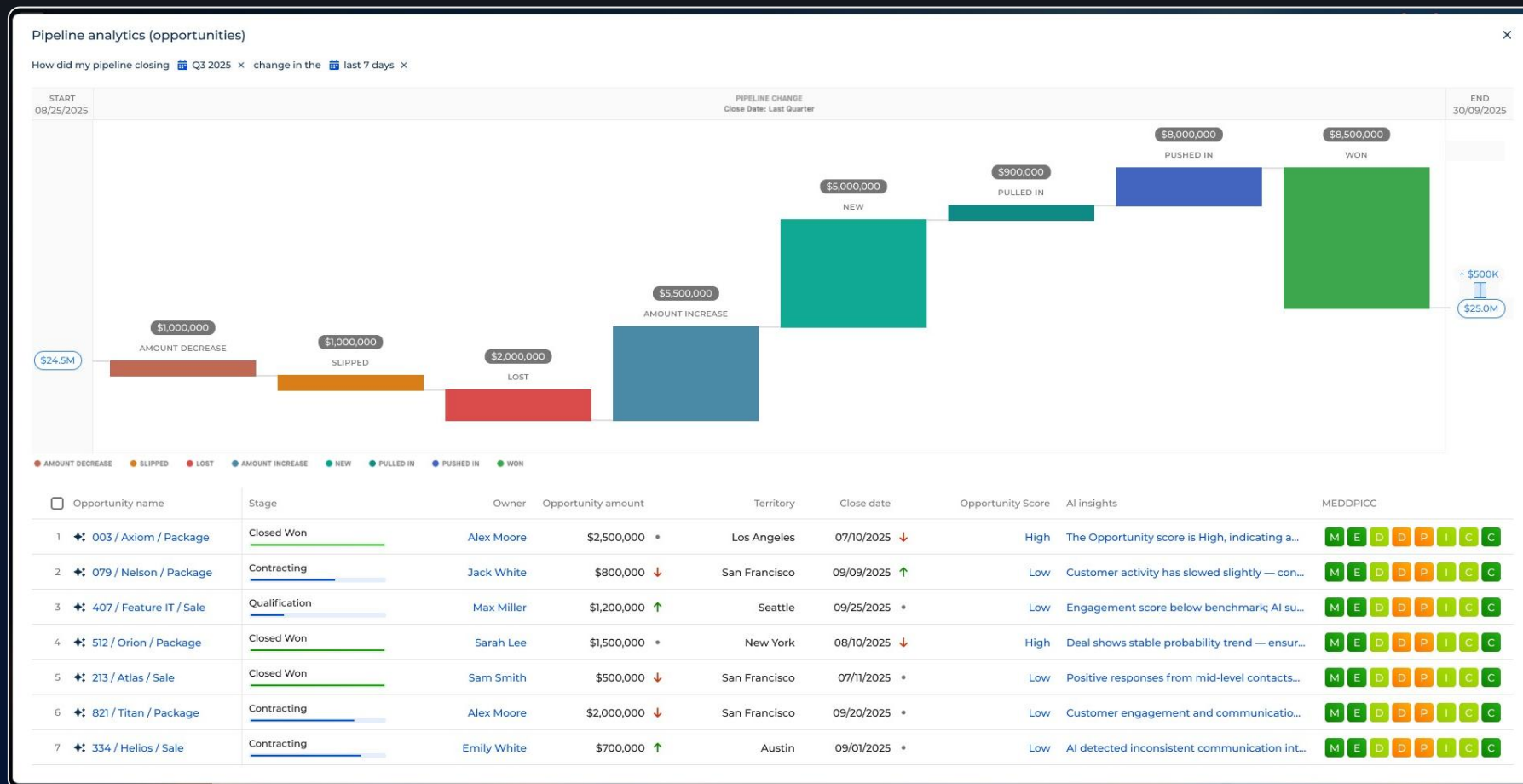
- Commit:** \$10,000,000
- Forecast Call:** \$15,500,000
- Gap To Go:** \$7,500,000
- Team Quota:** 42%

The 'Submission history' section shows a line chart comparing 'My Forecast Call', 'Team's commit', and 'New business quota' over time (7/3 to 9/30). Below the chart, it notes: 'Forecast call value increased by \$500K USD \$15,000,000 to USD \$15,500,000 Updated: 09/01/2025'. A note at the bottom states: 'Notes: No significant risks identified; focus remains on closing pending renewals by end of Q3 to sustain the current momentum.'

Pipeline Inspection – Waterfall Report

Understand not just what changed, but how and why it changed.

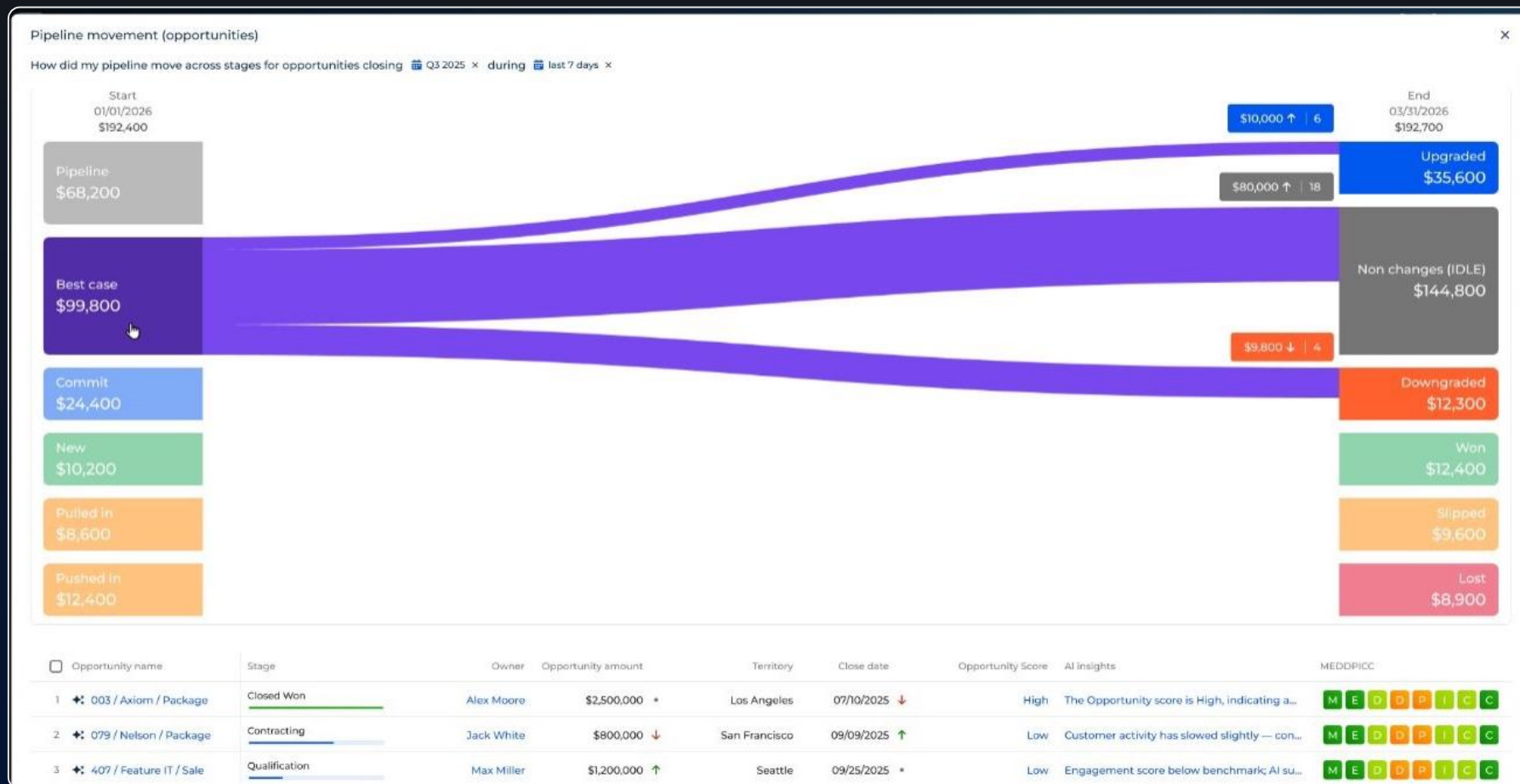
- Break down pipeline movement between two points in time, showing exactly why the total pipeline changed.
- Highlight key drivers of change, including new opportunities, amount increases or decreases, deal slips or pull-ins, and opportunities moved to Closed Won or Closed Lost.



Pipeline Inspection – Sankey Report

Understand not just what changed, but how and why it changed.

- Visualize how opportunities move across forecast categories over time.
- Provide detailed visibility into forecast changes by highlighting key movement drivers such as new deals, amount changes, slips etc.



Individual Opportunity Inspection

- Executive AI Summary:** Automatically summarize key risks, positive signals, and overall health of the opportunity.
- Buyer Engagement Scoring and Activity Insights:** Automatically tracked meetings, emails, stakeholder activity, and interaction trends.
- Best Next Steps and Guided Selling** Intelligent next actions and guided selling steps to improve execution and increase win probability for the opportunity.

The screenshot displays the Creatio CRM interface for an opportunity titled "Solar panels / UrbanEdge Properties, Emily Rodriguez".

Forecast management: Shows a table of quarterly forecasts for Q3 2025. The table includes columns for Name, Quota, and Status. Key entries include Sam Smith (\$16,000,000), Ben Brown (\$4,000,000), Max Miller (\$4,000,000), Jack White (\$3,500,000), Alex Moore (\$4,000,000), and Sam Smith (\$500,000).

Opportunities: A list of pipeline analytics showing various stages like "Closed Won", "Contracting", and "Qualification".

Activity Feed: A detailed view of the opportunity's activity, including a summary of all activity (8,460 Meetings, 1,880 Emails, 206 Calls, 347 Calls) and a MEDDPIC score (M, E, D, D, P, I, C, C). Next steps include "Schedule a meeting to discuss the proposal" and "Reducing energy cost volatility".

AI Insight: A forecast category prediction from the "Forecast management agent" dated Apr 15, 2026 at 9:46 AM. The insight describes the opportunity's current status in the "Commit" stage and highlights elevated execution risk due to incomplete stakeholder coverage and limited economic buyer alignment.

BETA

Individual Opportunity Inspection

- Relationship Intelligence**
 Analyze relationship strength, stakeholder coverage, and influence mapping within the opportunity account.

← 1247 / Solar panels / UrbanEdge Properties, Emily Rodriguez

At risk x

Qualification | Proposal | Negotiations | Contracting | Closed won

Next best offers

520W
Shingled cell solar panel
83%

Shingled cell solar panel
Featuring innovative shingled cell technology, this panel offers superior efficiency and enhanced resistance...

Opportunity information

Owner: John Best
Customer type: Existing customer
Opportunity category: Enterprise opportunity
Territory: New York
Customer need: Solar panels
Opportunity amount: 3,500,000.00

Days in funnel: 72
Opportunity amount: 3,500,000
MEDDPIC score: 20

Stakeholder Map | INFLUENCE MAP | INFLUENCE GRID | TABLE

9 of 9 contacts

ROLE

- Blocker
- Champion
- Economic buyer
- Executive sponsor
- Influencer
- Procurement
- Technical buyer

INFLUENCE

- Low
- Medium
- High

LOYALTY

- Champion
- Supporter
- Neutral
- Non-Supporter
- Blocker

RELATIONSHIP

LEGEND

- Moderate influence
- - - Potential influence
- Strong influence

Stakeholder Map Data:

- Jason Lee (VP of Engineering, BLOCKER) - Moderate influence to Sarah Kim
- David Carter (Operations Director, TECHNICAL BUYER) - Potential influence to Thomas Andersen
- Olivia Bennett (Leasing Director, INFLUENCER) - Moderate influence to Emily Rodriguez
- Mark Thompson (Head of Procurement, PROCUREMENT) - Moderate influence to Emily Rodriguez
- Sarah Kim (Head of Sustainability, INFLUENCER) - Moderate influence to Thomas Andersen
- Thomas Andersen (COO, ECONOMIC BUYER) - Moderate influence to Emily Rodriguez
- Emily Rodriguez (Head of Asset Management, CHAMPION) - Strong influence to Thomas Andersen

Individual Opportunity Inspection

- MEDDPIC Scorecard**
 Track qualification completeness and evaluates the opportunity against MEDDPIC criteria to identify gaps, strengths, and win-readiness.

← 1247 / Solar panels / UrbanEdge Properties, Emily Rodriguez
Close

At risk X
Next steps
Feed
Attachments

Qualification

Proposal

Negotiations

Contracting

Closed won

Days in funnel
72

Opportunity amount
\$ 3,500,000

MEDDPIC score
20

SUMMARY
AI INSIGHTS
STAKEHOLDERS MAP
MEDDPIC
TIMELINE
QUOTES
HISTORY

M
3

E
2

D
4

D
3

P
2

I
2

C
3

C
1

Metrics

SCORE

1

2

3

4

5

We understand expected business improvements and key metrics that have been validated by at least one stakeholder.

WHY THIS SCORE?

Business value is defined and validated with Emily Rodriguez and Sarah Kim. However, executive-level validation with Michael Reynolds and Daniel Whitaker is still incomplete.

AI Insight: Metrics include cost-saving benefits related to energy/cost volatility but lack explicit quantified financial targets and payback validation. Metrics are partially validated at operational stakeholder level but no full executive or Economic Buyer validation is observed. Current validation is appropriate for the Negotiations stage but needs strengthening for final approval readiness.

WHAT TO DO NEXT?

Engage stakeholders to identify and document measurable metrics; validate metrics alignment with multiple contacts; build a quantified business case and circulate for feedback.

AI Insight: Validate ROI with Economic Buyer; confirm executive-level success criteria; quantify business impact more clearly; align metrics across operational and executive stakeholders; strengthen business case validation as deal approaches closing.

Next best offers

520W

Shingled cell solar panel

Shingled cell solar panel

Featuring innovative shingled cell technology, this panel offers superior efficiency and enhanced resistance...

Opportunity information

Owner
John Best

Customer type
Existing customer

Opportunity category
Enterprise opportunity

Territory
New York

Customer need
Solar panels

Opportunity amount
3,500,000.00

Expected close date
5/21/2026

Created on
4/15/2026 1:58 AM

Forecast category
Commit

AI Forecast category
Best case

Search app...

 Pipeline and forecasts...

 Forecast management

 Territories

 Accounts

 Leads

 Opportunities

 Orders

 Forecasts

Search...

 Submission history

 Submit forecast

 Additional details

Forecast management

NEW BUSINESS FORECAST ACCOUNT FORECAST

USA Q2 2026 Manager

		Quota	Booked	Gap to go	Forecast call	AI Forecast call	Manager judgement
John Best USA	✖	\$18,000,000	\$6,006,332	\$11,993,668	\$15,010,000	\$14,360,000	\$9,693,756
Mary King Midwest	✖	\$3,000,000	\$2,065,565	\$934,435	\$2,890,000	\$2,690,000	\$3,265,561
Tiffany J. Martin Illinois	✖	\$1,300,000	\$818,065	\$481,935	\$1,350,000	\$1,150,000	\$705,665
Jason Robinson Michigan	✖	\$700,000	\$579,867	\$120,133	\$690,000	\$690,000	\$989,812
Megan Lewis Ohio	✖	\$1,000,000	\$667,633	\$332,367	\$850,000	\$850,000	\$1,570,084
Caleb Jones Northeast	✖	\$3,400,000	\$1,313,332	\$2,086,668	\$3,320,000	\$2,870,000	\$4,341,360
Peter Moore South	✖	\$4,200,000	\$1,536,962	\$2,663,038	\$4,100,000	\$4,100,000	\$1,742,777
Valerie E. Murphy West	✖	\$7,400,000	\$1,090,472	\$6,309,528	\$4,700,000	\$4,700,000	\$344,057

Opportunities

Pipeline analytics Pipeline movement

Title	Amount	Due date	Forecast categ...	Stage	In/Out Forecast	MEDDPIC
-------	--------	----------	-------------------	-------	-----------------	---------

COMING H1 FY27

Mobile Forecasting

- Review, adjust, and submit forecasts directly from mobile devices in real time.
- Instant visibility into pipeline changes, deal risks, forecast movements, and team performance while on the go.
- AI-powered insights, notifications, and guided actions to support faster decision-making and forecast accuracy from anywhere.
- Voice-first pipeline inspection and forecast submission



State of the art forecasting **operating cadence**

Key Activity	Format	What to Inspect	How Creatio Drives It
QBRs	<ul style="list-style-type: none"> Quarterly, first two weeks of the quarter 	<ul style="list-style-type: none"> Last quarter results Current quarter path to target Focus on building skills to forecast accurately Accurate forecast expected by week 2 	<ul style="list-style-type: none"> Freedom UI Dashboards New Forecasting Section (comparing forecast to inventory of deals)
Monthly Deep Dives	<ul style="list-style-type: none"> Beginning of Month 2 & 3 15 min w/ each rep Hosted by Dillon & CRO 	<ul style="list-style-type: none"> Inspection of deals to determine what's real, where the rep needs help Rolling 90 day view (sales cycles are shorter, so don't typically need to look farther out than that) 	<ul style="list-style-type: none"> Start in Forecasting Section to look at Commit & Stretch calls Dive into Opportunities to look at specific deals (review AI Summary, Activity and interact with Creatio.ai Agents) Review Waterfall Chart to understand the Pipeline movement
Weekly 1:1s	<ul style="list-style-type: none"> Fridays between rep & managers 	<ul style="list-style-type: none"> Pipeline health – ensure there are enough quality deals to hit the # Deal review – coach reps on deal strategy Rep activity – ensure reps are focusing their time appropriately 	<ul style="list-style-type: none"> Forecast Section review Dive into Opportunities to look at specific deals (review AI Summary, Activity and interact with Creatio.ai Agents) Freedom UI Sales Home Page Team Activity review
Weekly Forecast Calls	<ul style="list-style-type: none"> Mondays 9 am, 30 min Sales leaders from each division 	<ul style="list-style-type: none"> Review key deals required for “Stretch” goal Any ‘hold-ups’ called out so the team can get quick help and approvals 	<ul style="list-style-type: none"> Review Forecasting module Review AI Projection Review Sankey Chart to understand the Pipeline movement and updates throughout the week

Future Plans on **Forecasting**

Mobile forecasting
with voice-first
scenarios

Product-line
forecasts

Opportunity
splits

Advanced
scenarios for
Manufacturing

Deeper integration
with current Planning
capabilities

Advanced
Relationship
Intelligence

Thank you!