

# Frontline sales management: Forecasting and processes for growth

10 min read



As a sales director or sales manager, you probably spend a lot of time thinking about growth and trying to squeeze every opportunity you can to hit your department's revenue goals. *If only you had a crystal ball, right?* With a diverse team of salespeople and complex cycles of the sale to manage, nothing ever seems straightforward.

The truth is, in the world of frontline sales management, success hinges on balancing four simple pillars: **People, Plans, Processes** and **Leadership**:

- **People** – Do I have the right people in the right place on the team, and is everyone getting what they need for success?
- **Plans** – What are our target markets and revenue goals?
- **Processes** – What do we know about what it takes to close a sale, and have we got the right processes in place?
- **Leadership** – How can I get the most out of my team, remove any obstacles for them, and how can we forecast accurately?

## Your most valuable asset: People

Sales forecasting begins with understanding the capabilities of your team. After all, the effectiveness of your people directly influences your ability to forecast and hit targets.

As a sales manager, your role is to set your team up for success by:

1. **Building and developing a strong team.** Assess the strengths and areas for improvement of each salesperson. What training or coaching can bridge their skill gaps?
2. **Setting clear expectations.** Communicate specific, measurable goals. Ensure everyone understands the metrics they'll be held accountable for, whether it's the number of meetings booked, proposals sent or deals closed.

3. **Tracking individual performance.** Review each team member’s progress regularly and identify patterns. Who consistently delivers results, and who may need a little additional support?

## Understanding the track to success: Planning

Next is proper planning. This is where the heart of the sales process often lies when it comes to frontline management and sales forecasting.

### Where are we going?

Simply put, what is your sales target for the year? What does this look like, and how is it broken down by department or territory?

### How will we get there?

Knowing this involves studying several key principles. Some of the main facets to consider include:

- Objectives.
- Pipeline.
- Ratios.
- Macro / market trends.
- High priority accounts.
- Mapping the right people to the right accounts.
- Identifying the right targets.
- The development needs of your team.

As a professional sales consulting service, SBR Consulting uses a checklist to score clients based on the answers to some of these questions below.

QUESTION	SCORE	NOTES
Do you have clearly articulated objectives for the plan period?		
Have you factored in your current pipeline in order to identify your gap to goal?		
Have you used historical ratios to translate the gap into the relevant lead indicators?		
Are you factoring in macro trends that may impact historical ratios and adjusted inputs appropriately?		
Have you refined your ICP to reflect lessons learned and evolving proposition/market context?		
Have you segmented your account base using that ICP and other inputs?		
Have you built plans for the highest priority accounts?		
Have you aligned the right people to the right accounts and set the right targets?		
Have you identified development needs in your team and put plans in place to address?		



## Where are we now?

Knowing your current ratios is especially key, says **Managing Director Stuart Lotherington of SBR Consulting**.

“What we’ve discovered [when talking to sales teams] is that most people think they’re doing an awful lot more work than they actually are,” he says. “Probably the biggest complaint we hear with the organisations we work with is that they don’t track [their ratios].”

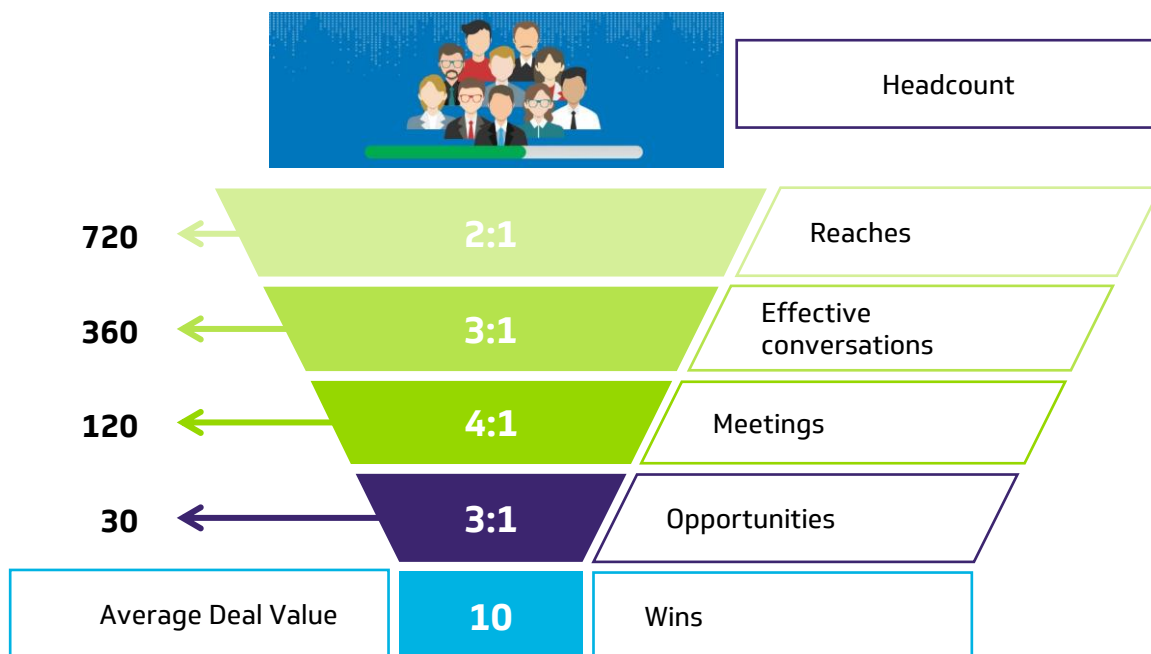
A good place to start, he says, is the number of appointments or client meetings.

“Often people overcomplicate this with all sorts of different elements – whether it’s gross margin, net margin, different product lines – and what happens is, you get ‘analysis paralysis,’ so people end up not doing anything. Very simply, even if you just went out and looked at your *schedule*, then looked at the number of *meetings* you have, you could at least have a rough idea,” Lotherington says.

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Stuart Lotherington, SBR Consulting

After looking at your current appointment ratios, then you want to assess your current performance metrics. This includes total sales to date, average deal size and sales cycle length. For example, breaking down your ratios might look something like this:



**Target 1 million**

## What is our target?

Next is the target. Most organisations need less help with this one, but what are the specific revenue goals you are trying to achieve annually? Now, how do you break down those goals into quarterly and monthly goals, accounting for seasonal factors and market variance?

## Where is the gap?

What is the gap between where you are and where you want to be? Knowing the target and knowing your ratios, you want to now work backwards, identifying how many additional deals, meetings or opportunities are needed to close this gap.

Keep this data in front of you on a weekly basis, so you know how your activity is (or isn't) driving results.

## What are the market/industry trends?

You want to get granular and make sure you really understand your territory and ideal client, as well as well as any market trends or variances that may affect the plan.

“We live in a VUCA world – it’s volatile, it’s uncertain, it’s complex and there’s ambiguity,” says **SBR Consulting Managing Director Alan Morton**. “Where should we be stepping back and thinking about what’s the outside [world] in perspective and knowing our historical data? What are the trends and how are they likely to impact our customers and how are they likely to impact *us* moving forward?”

“Build a plan that has some rigour behind it, rather than a plan that potentially falls through over people assuming that the past is going to be the same as the future,”

Alan Morton, SBR Consulting

Businesses can use the PESTLE formula below, he says, to help understand the current market climate.

<b>P</b> <b>Political</b>	<b>E</b> <b>Economic</b>	<b>S</b> <b>Social</b>
<b>Explore:</b> <ul style="list-style-type: none"><li>• Current taxation policy</li><li>• Future taxation policy</li><li>• The current and future political context</li></ul>	<b>Explore:</b> <ul style="list-style-type: none"><li>• Overall economic situation</li><li>• Strength of consumer spending</li></ul>	<b>Explore:</b> <ul style="list-style-type: none"><li>• Lifestyle trends</li><li>• Demographics</li><li>• Consumer attitude and options</li><li>• Media views</li></ul>

<p style="text-align: center;"><b>T</b></p> <p style="text-align: center;"><b>Technological</b></p>	<p style="text-align: center;"><b>L</b></p> <p style="text-align: center;"><b>Legal</b></p>	<p style="text-align: center;"><b>E</b></p> <p style="text-align: center;"><b>Environmental</b></p>
<p><b>Explore:</b></p> <ul style="list-style-type: none"> <li>• Relevant current and future technology innovations</li> <li>• The level of research funding</li> </ul>	<p><b>Explore:</b></p> <ul style="list-style-type: none"> <li>• Legislation in areas such as employment, competition and health &amp; safety</li> <li>• Future Legislation</li> </ul>	<p><b>Explore:</b></p> <ul style="list-style-type: none"> <li>• The level of pollution created by the product or service</li> <li>• Recycling considerations</li> </ul>

## Knowing your ideal client profile (ICP)

Your ability to manage a team and close deals efficiently also depends on targeting the right prospects. An ideal client profile (ICP) helps you focus on high-value opportunities. To define your ICP, assess your current clients to discover: Who are your top-performing clients, and what do they have in common? What clients would you like to “clone” to fill your pipeline?

Which industries or client types generate the highest lifetime value? Consider factors such as company size, revenue, location, and decision-making process.

Now, what specific bait or techniques do you need to be using to create a pond full of these clients? “If you don’t have an ideal client profile already determined, there may be differing opinions across different departments as to what the ideal profile looks like” explains **Principal Consultant Issy Chappel of SBR Consulting**.

“Reaching that consensus is really important to ensure there isn’t a real disconnect between [departments] that need to be pulling in the same direction,” she says.

## Processes: The backbone of sales management

Repeatable, predictable and *scalable* processes are the backbone of sales management. They ensure that your team operates efficiently and consistently, which is vital for reliable forecasting. Some things to focus on:

### Good pipeline management

A healthy pipeline is essential for hitting your targets. Regularly evaluate the quality and quantity of leads in your pipeline. Are there enough high-value opportunities to meet the revenue goals? How many overall opportunities are needed in the top of the pipeline to fuel the desired closing ratios?

## CRM utilisation

Hopefully you're using a Customer Relationship Management (CRM) system to track sales activities, manage leads, and analyse performance, but universal adoption among the sale team is crucial. A well-maintained CRM provides real-time visibility into your team's progress, and you'll only get as good a data as you put into it.

## Data-driven decision-making

Is your team running high on the drug of "hopium" (hope). Using historical data to identify trends and predict revenue outcomes is the only way to avoid dashed hopes and missed goals at the end of the year. For instance, if your team's meetings-to-close ratio is 5:1, and your target requires closing 50 deals, you know you'll need at least 250 meetings to hit your goal. You want to break that down further by individual styles and close rates for an even more granular, more personal forecasting rate. [Read more about the power of a predictable sales pipeline here.](#)

## Renewal strategies

And don't forget about renewals, says **Jerome Freytag, Managing Consultant at SBR Consulting**. "Companies that work on renewals with their clients will actually obtain 20 percent higher retention rates."

"There are two ways you can look at an account," he says. "An account you can either extend or expand, within an account."

## Leadership: Managing the Team

Finally, great leadership is the glue that holds people, plans, and processes together. This includes the gamut of providing support, inspiring confidence, the proper coaching and accountability, including a proper track for each team member to run on.

"One of the things we find in more complex environments, particularly with enterprise sales, is that the length of the sale cycle is longer than the length of the probation period," says **SBR Consulting Head of Product Development Bill Bauer**.

"This means we have far too many people who are failing late, which is extremely expensive [for an organisation]," he says. "Just making sure there's a really clear expectation set and really simple but focused tracking of lead indicators will help with that."

You also want to be as transparent about goals and challenges as you can. A motivated team is more likely to rally behind ambitious targets if they know what's coming.

Coaching sessions and one-on-ones are critical for communication and alignment. And a solid leadership plan also includes allocating resources to ensure your team's time and energy are focused on high-priority activities that drive results, not spent in endless meetings or data entry.

[See how AI can feed into your processes with this white paper.](#)

## Mastering the four pillars

Frontline sales management is both an art and a science, requiring a balance of several key factors. But by focusing on accurate forecasting and methodical execution, you *can* bridge the gap between where you are and where you want to be. For more on all of the above, check out our complimentary webinar on [Frontline Sales Management](#).

Need help analysing where you are getting your team on a solid track? [Let's talk growth](#).