

Section A - Forecasting Process Assessment

On a scale of 1 to 5 rate your disagreement or agreement with the statements below. A score of 1 represents total disagreement with the statement. A score of 5 represents total agreement with the statement.

# 1	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	A singular person is assigned and responsible for pulling together the overall forecast.
# 2	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	All team members for the forecasting process have been assigned and are actively involved in delivering their components.
# 3	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	There are effective tools in place and are being used to develop and monitor actual results compared to the forecast.
# 4	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	All key initiatives which will impact the forecast have been identified and are considered in the forecasting process.
# 5	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Specific timelines for delivering on these initiatives are included in the forecasting process.
# 6	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	All significant risks to effectively delivering on the forecast have been identified and mitigation strategies are considered as part of the forecasting process.
# 7	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	New opportunities to be captured in the upcoming period have been identified and considered as part of the forecasting process.
# 8	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	The leadership team has implemented effective feedback channels on the strengths or weaknesses in the forecast.

The highest possible score for this section is 40.

Total score for Section A assessment statements # 1 through # 8 = _____.

Section B - Research & Development Forecasting Assessment

On a scale of 1 to 5 rate your disagreement or agreement with the statements below. A score of 1 represents total disagreement with the statement. A score of 5 represents total agreement with the statement.

# 9	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	A singular person is assigned and is responsible for tracking R&D timeline metrics.
# 10	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Effective tracking tools are in place and used to track R&D timeline metrics.
# 11	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Trigger points in the R&D timeline for telling marketing when to prepare have been identified and communicated across the forecasting team.
# 12	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Trigger points in the R&D timeline to tell sales when they can start selling have been identified and communicated across the forecasting team.
# 13	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Any quantifiable ramifications to the forecast if the R&D milestones are missed have been identified and mitigation strategies implemented.
# 14	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Data privacy and security concerns have been addressed in the forecasting process to reduce risk to the R&D timeline.
# 15	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Contingencies are in place in the forecasting process to address defects in existing products to reduce risk to the R&D timeline.
# 16	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	The R&D team has implemented effective feedback channels to receive feedback on the developed product.

The highest possible score for this section is 40.

Total score for Section B assessment statements # 9 through # 16 = _____.

Section C - Marketing Funnel Forecasting Assessment

On a scale of 1 to 5 rate your disagreement or agreement with the statements below. A score of 1 represents total disagreement with the statement. A score of 5 represents total agreement with the statement.

# 17	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	A singular person is assigned and is responsible for tracking the marketing funnel metrics.
# 18	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Effective tracking tools are in place and used to track marketing metrics.
# 19	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	The top three to five lead sources delivering the highest volume of leads have been identified and are considered in the forecasting process.
# 20	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	The top lead sources delivering the highest and lowest dollar value to customers have been identified and are considered in the forecasting process.
# 21	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	The top lead sources delivering the highest and lowest percentage of won customers have been identified and considered in the forecasting process.
# 22	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	The top lead sources delivering the shortest and longest sales cycles have been identified and considered in the forecasting process.
# 23	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	The cost per lead associated with each lead source is known and used as part of the forecasting process.
# 24	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	The marketing team has implemented effective feedback channels to receive customer feedback on alignment of marketing messaging with customer expectations.

The highest possible score for this section is 40.

Total score for Section C assessment statements # 17 through # 24 = _____.

Section D - Sales Process Forecasting Assessment

On a scale of 1 to 5 rate your disagreement or agreement with the statements below. A score of 1 represents total disagreement with the statement. A score of 5 represents total agreement with the statement.

# 25	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	A singular person is assigned and is responsible for tracking the sales process metrics.
# 26	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Effective tracking tools are in place and used to track sales process metrics.
# 27	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Internal phases or stages of the sales process have been identified and are being used in the development of the sales forecast.
# 28	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Specific criteria for each phase have been identified and documented for a prospect to move from one phase to the next.
# 29	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	The overall average close rate is known and has been used in the development of the sales forecast.
# 30	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	The overall average sales cycle is known and has been used in the development of the sales forecast.
# 31	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Any seasonality assumptions in the close rate or sales cycle have been identified and considered as part of the forecasting process.
# 32	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Both won and lost prospects are surveyed to learn and improve the sales forecast and forecasting process.

The highest possible score for this section is 40.

Total score for Section D assessment statements # 25 through # 32 = _____.

Section E - Customer Success Process Assessment

On a scale of 1 to 5 rate your disagreement or agreement with the statements below. A score of 1 represents total disagreement with the statement. A score of 5 represents total agreement with the statement.

# 33	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	A singular person is assigned and is responsible for tracking the customer success process metrics.
# 34	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Effective tracking tools are in place and used to track customer success metrics.
# 35	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	The number of customers has been forecasted for expansion in the next period, including forecasting the dollar value.
# 36	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	The number of customers has been forecasted for contractions in the next period.
# 37	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	The average dollar value for contractions per customer has been forecasted.
# 38	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	The recent historical retention rates for customer counts and dollar value are known and used in forecasting.
# 39	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	There are effective methods in place used to track customer satisfaction.
# 40	1 2 3 4 5 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Lost customers are routinely surveyed to learn and improve.

The highest possible score for this section is 40.

Total score for Section E assessment statements # 33 through # 40 = _____.

Section F - Forecasting Assessment Summary

Section A total score = _____. (Process)

Section B total score = _____. (R&D)

Section C total score = _____. (Marketing)

Section D total score = _____. (Sales)

Section E total score = _____. (Customer Success)

Total score of all sections A through E = _____. The highest possible score is 200.

Sum of scores for statements 1, 9, 17, 25, and 33 = _____. The highest possible score is 25. (Ownership)

Sum of scores for statements 3, 10, 18, 26, and 34 = _____. The highest possible score is 25. (Tracking Tools)

Sum of scores for statements 8, 16, 24, 32, and 40 = _____. The highest possible score is 25. (Learning)