Add-In solution for predicting and managing opportunities in complex B2B sales

B2B Sales Excellence in Opportunity Management

Add-in solution for Microsoft Dynamics 365 CE

Completely anonymized data processing

You remain in your familiar CRM environment

The combination of a psychometric questionnaire with the AI-based forecasting model achieves a **hit rate** of **82%**.

By measuring success factors, the **gut feeling** becomes **transparent** and traceable.

The solution optimizes the entire sales process and increases the win rate of your pipeline.

Challenges in complex B2B sales

In B2B sales, predicting the probability of success is accompanied by numerous **cognitive biases**. The gut feeling distorts the picture of the sales situation and leads to **win rates** that are regularly **below 50%**.

To predict the **probability of success** for opportunities and control the sales process proactively, you need to know the relevant success factors. The "**Sales Forecast 4.0**" study has been the first empirical research to identify these **success factors** and develop a short **psychometric questionnaire** to measure them.

1. The success factor **Relationship & Commitment** reflects various aspects of the relationship with the prospect (7 questions).

2. **Competitiveness** considers the relative strength of the strongest competition (5 questions).

3. The factor **Requirements & Ideas** shows to which extent the solution matches the requirements and ideas (4 questions).

The questionnaire takes about 3 to 5 minutes to answer

The sales team rates the questions on a 5-point Likert scale

The success factors are measured reliably and validly

The AI-based forecasting model

To achieve the best **prediction accuracy**, the AI-based forecasting model uses only information from the intersections of the circles (Area A, B, and C). The reason is that only this information has a **correlation** with the **purchase decision**.

This AI approach makes it possible to "filter out" information like **unwanted influences** such as the pressure to succeed or bad moods.
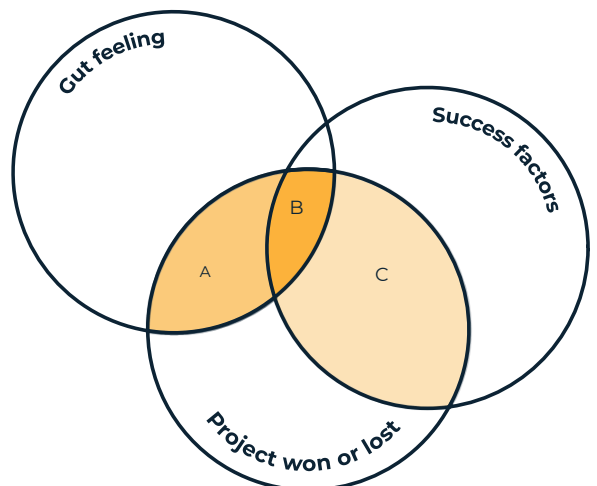
Keeping track of sales process with forecast details

With each response to the questionnaire, the salesperson gets a realistic picture of the current sales situation. Based on the **rated success factors**, the sales team can manage the sales process in a targeted manner. In addition, success factors provide an overview of the problem areas of each opportunity. The **history** shows where the probability of success increases, the sales process stagnates, or the deal might start to fail.
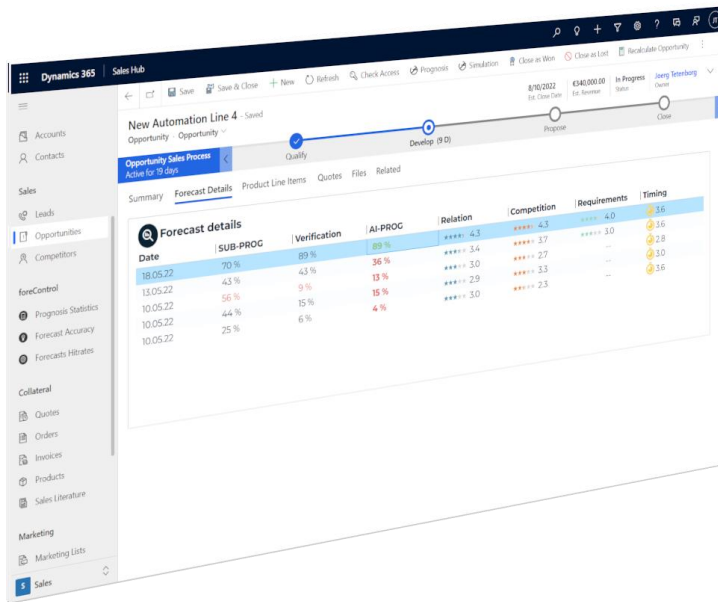
Rated success factors on a scale from 1 to 5

AI-PROG: Probability of success according to forecasting model

Checking the gut feeling for plausibility

Verification of the expected closing date

Optimized sales process through simulation

With the help of simulation, you can change the relevant answers from the last prediction and recalculate the probability of success. These "What If scenarios" can be used to derive **recommendations for action** to close the deal faster.

Top 3 recommended actions to improve the probability of success

Benchmarking of the rated success factors

Simulation of the probability of success based on the last prediction
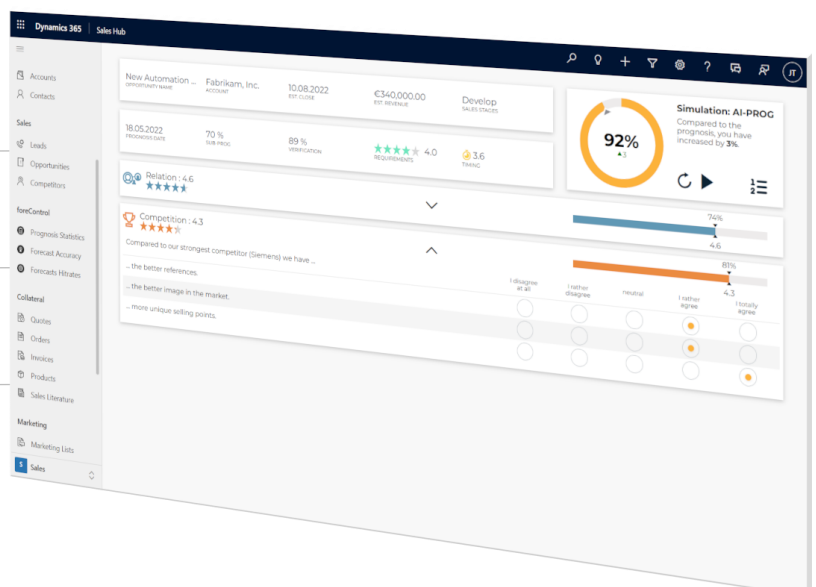
Demonstration of prediction quality and hit rate

The solution uses ROC curves (Receiver Operating Characteristics) to evaluate the accuracy of predictions. The area under the curve is a commonly accepted **indicator** of **prediction quality**. Comparing the gut feeling with the forecasting model shows the more accurate prediction quality. The difference between the two AUCs demonstrates the **ROI** of the solution.
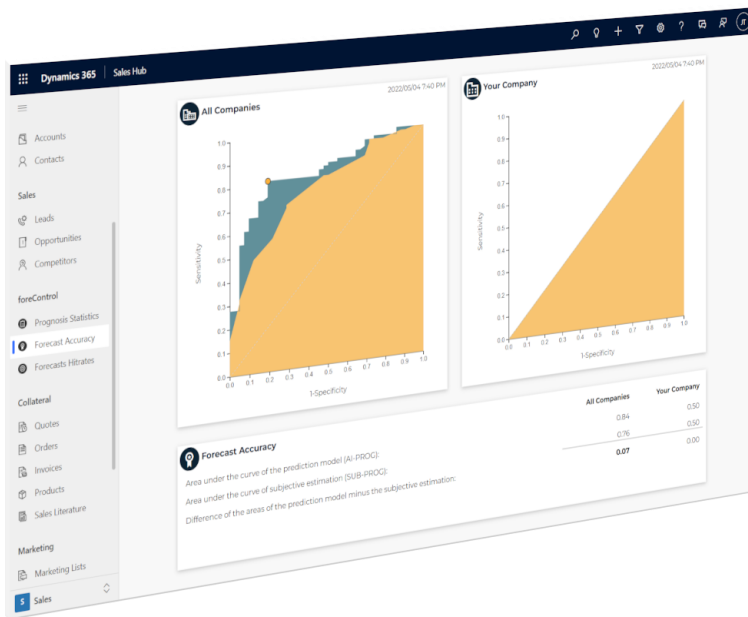
Benchmarking of prediction quality and hit rate across all companies

Presentation of prediction quality in comparison to gut feeling

Calculation of the optimal cut-off value (at which point is the opportunity safe)

The advantages at a glance

✓ The more accurate prediction of expected revenues gives executives more planning reliability.

✓ Sales management can make the most of limited resources and gain more control over expected order income.

✓ The sales team controls its sales activities based on objective success factors.

✓ By measuring the success factors, the gut feeling becomes transparent and traceable.

✓ The solution provides recommended actions to improve the probability of success.

✓ The solution optimizes the entire sales process and increases the win rate of your pipeline.

Try out our solution for free!

We will be happy to advise you on the benefits and possible applications.

www.foreControl.de