

Sales Forecasting Meeting Template

Date: [Insert Date]

Time: [Insert Time]

Location: [Insert Location]

Meeting Lead: [Insert Name]

Opening Section:

1. **Welcome and Forecasting Overview**
 - Introductions and overview of the meeting's purpose
 - Brief discussion on the importance of accurate forecasting
2. **Review of Previous Forecasts**
 - Analyze the accuracy of previous sales forecasts
 - Discuss any discrepancies and their causes

Core Agenda Items:

1. **Current Pipeline Status**
 - Review the current sales pipeline and deal stages
 - Identify key opportunities and potential risks
2. **Market Trends and Influences**
 - Discuss market trends that may impact sales
 - Consider external factors like economic conditions or competitor activity
3. **Sales Data Analysis**
 - Analyze historical sales data to identify patterns
 - Use data insights to inform the upcoming forecast

Forecasting and Planning:

1. **Developing the Sales Forecast**
 - Collaboratively build the sales forecast for the upcoming period
 - Ensure the forecast is realistic and achievable
2. **Alignment with Business Goals**
 - Align the sales forecast with overall business objectives
 - Discuss how the forecast supports strategic priorities
3. **Contingency Planning**
 - Identify potential challenges and risks to the forecast
 - Develop contingency plans to address possible scenarios

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Closing Section:

1. Recap of Forecasting Decisions

- Summarize the key forecasting decisions made
- Assign follow-up tasks and responsibilities

2. Next Forecasting Meeting Details

- Confirm the date and time for the next forecasting session
- Set expectations for ongoing forecast reviews