

YANTRA INTELLIGENCE

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# Sales Forecasting That Works

Why weighted pipelines mislead executives — and a simpler method that doesn't.

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*"Nothing happens until someone sells something — and it's not that difficult to project forward revenue from a list of closed deals. The hard part is knowing which deals to trust."*

In this issue I want to discuss the thorny topic of how to produce an accurate sales forecast from a pipeline of deals, and show you a methodology that we've built into Yantra CRM. This is mission critical to any business — how can executives make investment decisions without a credible view on forward income?

I worked in sales management for Californian tech companies for most of my career, including as Sales Director at Intel Corporation. Intel needed pinpoint accuracy on sales because of the massive capital costs of building wafer fabrication facilities. Sales meetings were brutal. Every rep had to present a stagger chart showing the six-month forecast, including what they had committed last month for this month. If you said £X and delivered £X/2, people noticed.

I have also been Chairman & CEO of a company that introduced Salesforce for forecasting, marketing, and field service. There was nothing wrong with the software — but the sales reps hated it. Complex, time-consuming, and difficult to use.

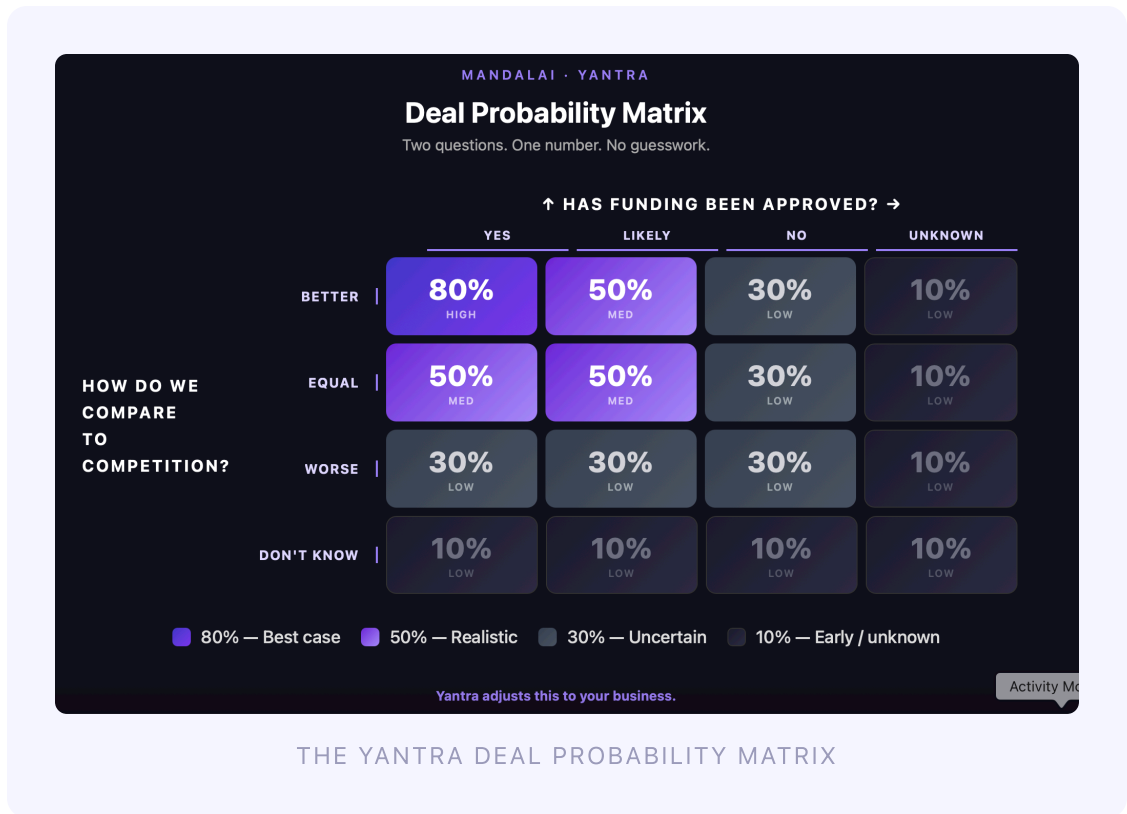
# The Salesforce Methodology

Salesforce uses a pipeline-based methodology built around a few core concepts:

- **Opportunity Stages & Probability** — each deal is assigned a stage with an associated probability. Forecast amounts are calculated as *deal value × probability*, giving a weighted pipeline view.
- **Forecast Categories** — Pipeline, Best Case, Commit, Closed. Reps can manually override which category a deal sits in.
- **Rollup Hierarchy** — forecasts roll up from rep → team lead → manager → VP → CRO, with manager overrides sitting alongside the original number.

Given Salesforce's success they clearly have something right — but in my opinion it's far too complex for SMEs. The key weakness is that it relies heavily on rep discipline. Garbage in, garbage out.

# The Yantra Method



At Mandalai AI Solutions we believe that simplicity is the key to adoption, and that only the highest-rated deals go into the forecast — not factored by a percentage,

but at their full forecasted value. Crucially, **the sales rep doesn't get to choose the probability.**

There are just two qualifying questions:

- **"How do we compare to our competitors?"** — if the deal is real, the customer is almost certainly comparing you to someone else.
- **"Has funding been approved?"**

The only deals that go into the **committed forecast** are at **80%** — we are better than the competition and the money is approved. A sales rep can't simply say a deal is at 50%; they enter two qualifying fields and the system assigns the probability. As management, we can see *why* a deal is at 50% or 30%.

There are only four numbers: 10%, 30%, 50%, and 80%. Prospects are 30–50%; suspects are 10% (unqualified); committed forecast is 80% only. The sales rep never picks a number. The system does.

## The Stagger Chart

The other tool Intel used religiously was the stagger chart — a rolling view that shows not just where the forecast is today, but how it has moved over time. Each row represents what was forecast *at that point in the year* for each future month. Reading down a column shows you whether confidence was building or eroding.

Read each row as "what did we forecast in [month] for each future month?"  
(£'000s)

Forecast as of →	Jan	Feb	Mar	Q1	Apr	May	Jun	Q2
January	300	320	310	930	315	320	315	950
February	—	150	380	830	330	320	320	970
March	—	—	490	920	340	320	320	980
April	—	—	—	—	315	310	330	955

May	—	—	—	—	—	290	330	620
<b>Actual</b>	<b>280</b>	<b>150</b>	<b>490</b>	<b>920</b>	<b>315</b>	<b>290</b>	<b>323</b>	<b>928</b>
Plan	320	321	321	962	320	321	322	963
Actual YTD	280	430	920	—	1,235	1,525	1,848	—
Plan YTD	320	641	962	—	1,283	1,604	1,925	—
% vs Plan YTD	88%	67%	96%	—	96%	95%	96%	—

BOOKINGS STAGGER CHART, £'000S — HIGHLIGHTED DIAGONAL = FORECAST RECORDED IN THAT MONTH.

February actual was £150k against a January forecast of £320k — deals slipped into March. But the stagger chart showed this happening in real time: the February forecast row already showed March swelling to £380k, and by the time March closed at £490k, the team had recovered to 96% of plan YTD. Without the stagger chart, the February dip looks like a disaster. With it, management could see the pipeline was intact — just delayed. By June, the business finished at 96% of plan.

Yantra will generate this view automatically. Coming in a future release.

This is easy to remember, impossible to game, and takes seconds to update. That's the Yantra method.

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