

Clari Revenue Forecasting Configuration Guide

Make your Clari forecast numbers ones you can actually trust. Configuration guide for cleaner signal and more reliable submissions.

8

Sections

< 2hr

To configure

2 cycles

To see accuracy lift

Clari is only as good as the inputs it receives.

Mis-mapped fields, inconsistent forecast categories, and reps who submit numbers out of habit mean the AI is working with bad data — and your board forecast reflects it.

Common Configuration Mistakes

- CRM fields not mapped to Clari fields
- Forecast categories don't match pipeline stages
- Quota not loaded for all reps
- AI signals not tuned for your sales motion
- Manager override protocol undefined

What Good Looks Like

- Bi-directional CRM sync with 0 blank fields
- Stage-to-category mapping everyone understands
- Rep commits based on deal signals, not gut
- AI risk flags that surface real problems
- Weekly cadence that takes < 45 minutes

8 sections. Every configuration decision that affects forecast accuracy.



Section 1: CRM Field Mapping & Sync Configuration

The exact Salesforce fields to map to each Clari field — and how to validate the sync is working



Section 2: Forecast Category Definitions & Stage Mapping

Omit, Pipeline, Best Case, Commit, Closed — where each stage should map and why



Section 3: Rep Commit & Best-Case Submission Workflow

The submission process, review template, and what to do when a rep's numbers don't match the AI



Section 4: Manager Inspection & Override Protocol

When managers should override the AI, how to document it, and what good inspection looks like



Section 5: Weekly Forecast Meeting Agenda

The meeting template that replaces 3 separate sync calls and runs in under 45 minutes



Section 6: AI Signal Tuning (Risk Flags & Coverage)

Configure risk signals and coverage thresholds that match your specific sales motion



Section 7: Quota & Territory Setup Reference

Quota loading, territory configuration, and the common mistakes that corrupt attainment reporting



Section 8: Executive Dashboard Configuration

The 5 views that give your VP and CFO the signal they need without requiring a call to explain it



A forecast your board will actually believe.

Configure once, trust always. Work through the 8 sections in order and see forecast accuracy improve within two forecast cycles.

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