

The revenue operations cadence

# The Board Meeting

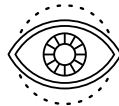
There are critical moments during every week, month, and quarter that define how you generate and accelerate revenue. We refer to these recurring points in time collectively as the connected revenue operations cadence.



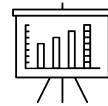
1:1 meetings



Weekly team meetings



Forecast calls



Board meeting



QBR

*The connected revenue operations cadence — a set of recurring meetings and group forums — can be the backbone of organizational alignment and consistent execution across your go-to-market teams.*

At each 1:1 meeting, QBR, pipeline review session or forecast call, there are key questions you need to be able to answer quickly to drive your selling process and close more deals faster. When executed properly, with visibility and accountability across sales, marketing, and customer success, these moments can lead to improved and predictable top-line results—quarter-after-quarter. But, how often do you spend your 1:1 meeting, QBR, or forecast call debating the numbers or chasing down the status of deals instead of strategically discussing a close plan? That's where Clari comes in.

# Are you missing your moment?

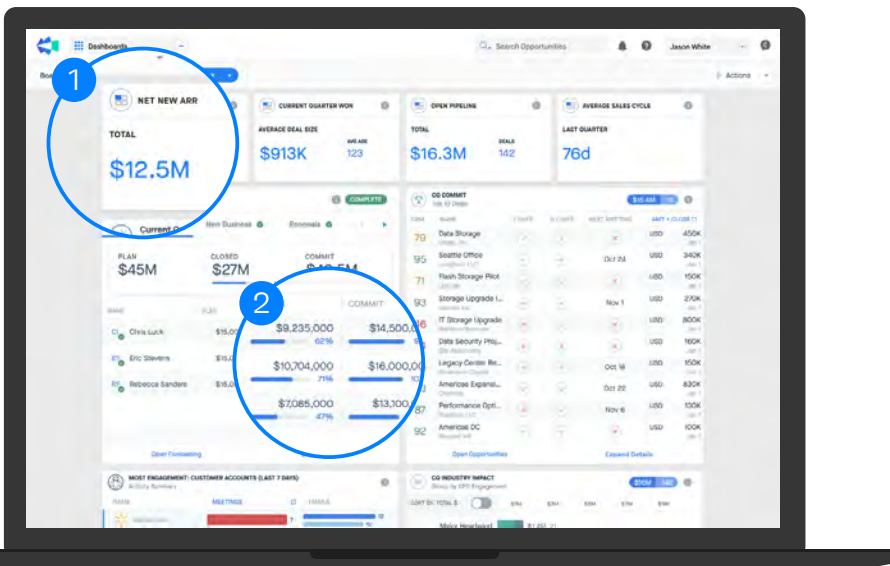
The board meeting is your moment to apprise the board of what's going right, what's going wrong, and what you want them to do about it. If you're like a lot of executives and sales leaders, preparing for the board meeting is still a long and manual process for you. You spend the days leading up to the meeting running reports, pulling static data, populating slides, and polishing your deck. By the time you dot all your i's, cross your t's, and calculate your risk, the data's no longer relevant. Stop. Now there's a better way.

## How to run your board meeting in Clari

Lose the static reports, spreadsheets and the presentation deck. Now you can run your board meeting right from Clari where you can easily access all the data and predictive insights you need in real time.

### Step 1. Walk through your goals for the quarter.

As you're thinking about the agenda, it's important to remember that you live and breathe your data every day, but your board doesn't. You need to start by grounding everyone on your quarterly goals. With Clari, you can easily view how you're tracking on key business metrics including net new logo velocity, upsell and renewals, ARR/MRR, ACV/TCV, churn, and where you are against goals.

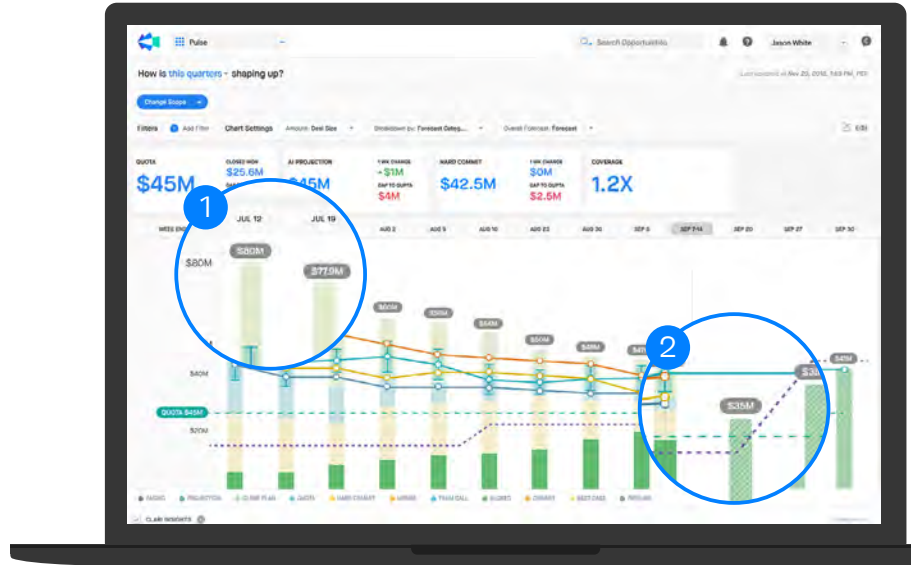


- 1 View key performance metrics and how they are changing from a single dashboard
- 2 Show progress towards hitting revenue targets by reviewing sales forecast against quota and Clari's AI-driven projection

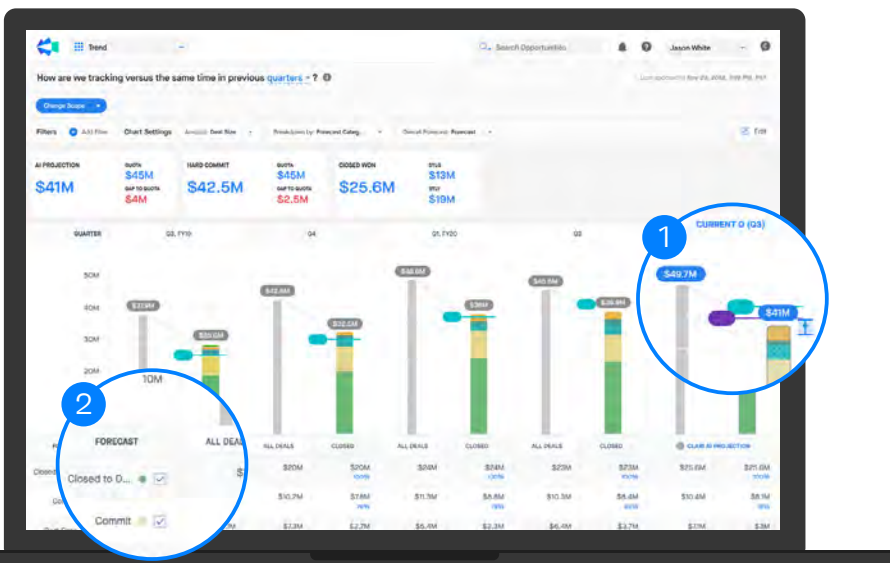
## Step 2. Provide an up-to-the-minute view on how the quarter is progressing.

Once your board is up to speed on goals and objectives, you can show them in real time how the quarter has played out so far. With easy access to week-over-week data, you can show them exactly what you have in commit, best case, pipeline, and show how the forecast has evolved over the course of the quarter. You can even see how you're performing from a linearity perspective, and if you're on track to meet the goals you

- 1 Show how your pipeline has evolved week over week how much business was closed
- 2 Explain how you're tracking against the quota and linearity goals



With Clari, you can also dive a little deeper and show your board how data science gives with your forecast. You can compare your team's call against the AI-based projections and view how you're tracking this quarter compared to the same time in previous quarters.

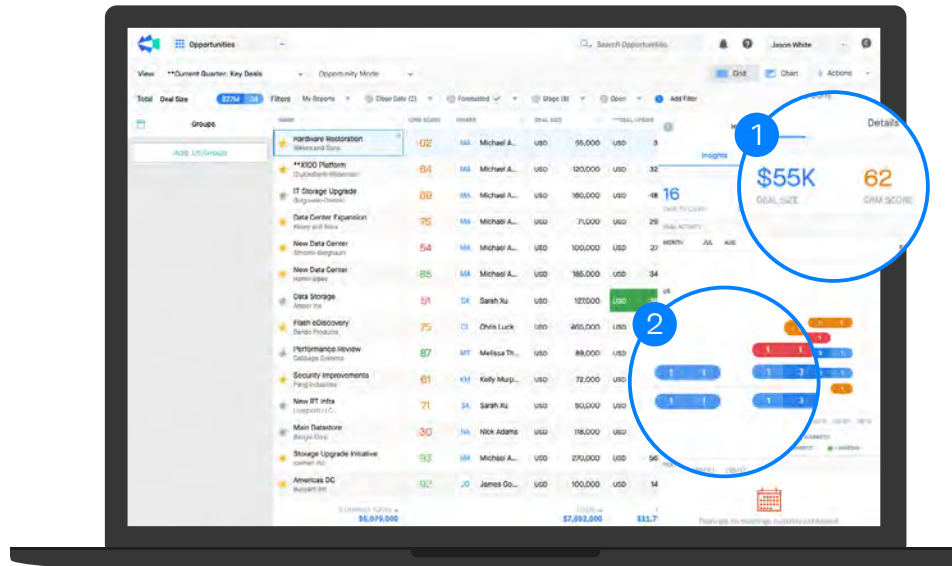


- 1 Share with your board how your current inventory of deals squares with your hard commit, your quota, and Clari AI-based projections
- 2 Compare your close ratios from previous quarters to now

### Step 3. Zero in on critical deals.

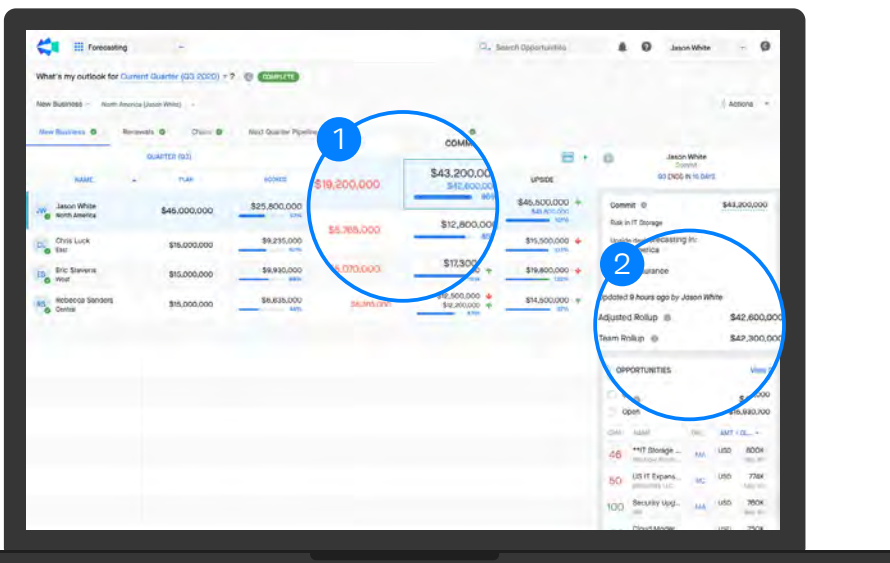
To ensure you meet quota and close deals on time, you may need to leverage your board's connections at key accounts. Clari lets you take a closer look—deal by deal—to identify those opportunities that may be at risk, and see where you can mobilize your board to accelerate critical deals.

- 1 Examine the Clari Opportunity Score to determine which deals are at risk and why
- 2 View rep and customer engagement data to assess deal health



### Step 4. Net it all for the quarter.

Now that your board understands the goals, how the quarter is progressing, and where they might be able to help, give them a summary and answer any other questions they might have about the business.



- 1 Review forecast and show how it compares to your quota and closed business across every dimension of your business
- 2 Explain where you think you'll land and how that compares to your team's opinion

Stop polishing your deck and [start making your number.](#)

[Request a free demo](#) now so you can stop wasting time and start focusing on the deals that matter most.



—Clari gives us a real-time window into our health of our forecast at any given moment during the quarter. Bringing this visibility into the boardroom allows us to accurately convey the true state of our business and get the critical buy-in we need from the board to move our business forward.

David McKeough  
Executive VP, Global Field Operations



—Clari gives us an increased level of confidence forecasting the growth of our business. The enhanced visibility provides additional insights that were previously tracked in various BI dashboards.

Brett Pollacks  
CFO



Clari helps revenue teams streamline operations, improve predictability, and be more efficient by using AI and automation to create full funnel accountability across the entire revenue operation.

For additional information, visit us at [clari.com](http://clari.com) or email us a [hello@clari.com](mailto:hello@clari.com)