

# Intro to Forecast emails

## Background

A key part of the user journey is to educate end-users on the value of Gong while painting a picture of how it will fit into their everyday routines. We will use a combination of email, in-app promos, and training to accelerate adoption by introducing key workflows to users at the right time and place.

## Objective

Introduce 3-5 user personas to forecasting workflows in Gong, while demonstrating the “What’s in it for me”

## How it works

Each email will be triggered once the persona reaches a certain adoption milestone that unlocks the value of their prescribed workflow (eg. Trigger a pipeline review email once an FLM has at least one deal warning for an open opportunity on their team).

## Audiences

We will target at least three user personas: Individual contributor who submits forecasts, front-line manager of a quota carrier, and 2nd level + leaders. Optionally, we can target CSMs separately from other ICs and/or target users with Revops or Enablement titles.

## Roles & Responsibilities

**Customer Marketing:** Drive content creation, Align with PMM on messaging & CTAs

**User Journey:** Email Design, Program Design

**PMM:** Provide messaging guidance, Recommend CTAs and next steps

**PM:** Agree on CTA’s & Next Steps

**Content/Editorial:** Draft body copy for emails

## Content

### Manager

Trigger	One week before the company snapshot is due + did not submit forecast
Subject	Only 7 days left: Submit your forecast now
Pre-text	Your revenue insights are waiting
Headline	A forecast deadline is approaching — get it done with Gong

H2	<b>Why does it matter?</b>
Why it matters	Your forecast gives you the ability to discern insights — not just numbers.
Body	<p>Forecasting with Gong isn't about digging through data; it's about transparency and command over your book of business. Gong Forecast is your dashboard for seeing a true picture of target achievements—safeguarding against the risks of misallocation and inaccuracy.</p> <p>Get your time back — no guesswork, no redundant questions, just strategic decisions informed by solid, impartial data. Your forecast rollup is prepped and ready for your review.</p>
CTA	Review your rollup

**IC - Sellers, CSMs, & SDRs who submit forecasts**

Trigger	First submission is due in at least one week + Board configured
Subject	Are you prepared to submit your forecast?
Pre-text	Beat the clock — update your deals now and relax later
Headline	Countdown to success: A painless forecast submission is here
H2	<b>Why does it matter?</b>
Why it matters	Gong's forecast submission process saves you time, reduces stress, and allows you to focus on what's important: closing deals and driving growth.
Body	<p>Juggling research, sales calls, and endless admin can overshadow your real mission — driving revenue.</p> <p>Gong syncs your customer activities and CRM data automatically, transforming pipeline updates from a chore into a seamless part of your workflow. With Gong, forecast submissions are quick and hassle-free, minimizing the need for constant back-and-forth with your manager. Redirect your energy from managing data to closing deals and accelerating revenue growth.</p>

CTA	Review open deals
-----	-------------------

## Managers of Managers & Admins

Trigger	Day before the company snapshot is due
Subject	24-Hour Notice: Your Company Snapshot Awaits!
Pre-text	Dive into your pipeline pacing trends
Headline	You can't predict the future — but you can stay ahead of the game
H2	<b>Why does it matter?</b>
Why it matters	Turning scattered revenue data into actionable insights enables you to pinpoint risks, seize opportunities, and identify growth areas with precision.
Body	<p>With just a day left before your company snapshot is due, the pressure is on to compile and analyze your forecasting data. Navigating through scattered information to gauge revenue health can feel overwhelming. Questions like "Are we meeting our targets?" and "What's the outlook for next quarter?" demand precise answers.</p> <p>Gong simplifies this process, bringing all your crucial revenue data into one streamlined view. With Gong, you can quickly assess if you're on target, and delve into the details of your forecast, identifying opportunities for impactful action.</p>
CTA	See how you're pacing