Sales Pipeline Overview

A sales pipeline defines a typical step by step process that sales reps go through to convert a prospect into a paying customer. A sales stage is created for each step in the sales process. The sales rep is responsible for moving the stages as the prospect's interest level changes. The number of sales stages will vary based on the length of your sales cycle and the number of interactions needed to close a deal.

Example Sales Pipeline Stages:

- New Opportunity: Assign a stage like this when a lead is automatically or manually created.
- Qualifying: Assign a stage like this when the sales rep begins contacting the prospect to gather details about the prospect and their level of interest.
- Demo: Assign a stage like this when the prospect agrees to a demo, a free trial, an in person meeting, etc. Use a name that accurately describes the nature of the stage.
- Proposal Pending: Assign a stage like this after the sales rep issues a quote, proposal or estimate.
- Negotiating: Assign a stage like this after the prospect responds to a proposal, but requests some changes before committing to a purchase.
- Won: Assign a stage like this after the Prospect makes a purchase.
- Delayed: Assign a stage like this if a Prospect is qualified and truly interested in your product, but their decision-making timeline has been delayed.
- Lost: Assign a stage like this when the Prospect purchases from a competitor or

decides they are no longer interested in your product.
- Unable to Contact: Assign a stage like this when the sales rep is not able to connect with a Prospect.

Prospects enter the sales pipeline when an opportunity record is created in Infusionsoft, either manually or automatically. From that point on, the sales rep guides the prospect through the sales stages. This is not necessarily a linear process where every prospect goes through every stage. Instead, it is a framework for making the sales process more systematic and standardized. All of your sales reps are following the same basic process, which makes it easier to train new sales team members.

Pipeline Automation

Because you are using Infusionsoft to manage your sales pipeline, you can set up actions that trigger when a sales rep updates the stage for an opportunity. This allows you to create strategic automated follow up that is appropriate based on the prospect's stage and to control the messages that are sent. The actions may include creating a task, starting a follow-up sequence, sending one email, and more.

In the example above, an action could be set up to trigger when the prospect moves into the proposal pending. The action might trigger a follow-up sequence that includes a series of 3 to 5 emails from the sales rep following up to make sure that the prospect received the proposal and to offer to answer questions, discuss other options, schedule another meeting, etc. The spacing of the emails will depend on how long it generally takes a prospect to respond to a proposal. Usually they are several days apart and are sent out over a 2 to 3 week period.

You might also set up an action for the delayed stage. This sequence could include a series of emails from the sales rep that maintains the relationship with the prospect until they are ready to engage again. The emails in a sequence like this are usually spaced farther apart, but it may span a longer period of time. The emails might include links to interesting blog articles from your company website, links to web pages that have free resources, etc.

Map out your company's typical sales process by observing your most successful reps. Identify actions for each stage, then set up your sales force automation processes in Infusionsoft.

Customized Sales Pipeline Stages

When a prospect moves through your sales funnel, your sales team needs to keep track of their status. You can set up custom sales stages to organize opportunities and help your sales team prioritize their manual follow up. Sales reps also need to know the history of their interactions in order to be efficient and to make a strong connection with prospects. Infusionsoft's Opportunity component keeps track of where prospects are in your sales cycle, what's been done in the past, and what needs to happen in the future (e.g., follow-up phone calls, special offers, etc.) You define sales stages based on your company's standard sales process and lead categorization - they are completely customizable.

Sales Triggers

As sales reps move prospects through your custom sales stages, Infusionsoft can automatically trigger actions that change the prospect's follow-up messages. This allows you to send follow-up sequences, special offers, and reminders that apply to each stage of the process. Sales automation can be integrated with a marketing campaign to provide you with an overall picture of your sales and marketing strategy.

Reporting and Forecasting

The tracking functionality of the Opportunity component provides you with data and reports to evaluate sales performance and forecast future sales. This information can help you manage lead flow, distribute new opportunities, and optimize your entire sales process.