Trigger Sales Automation Without Moving A Stage

Sales stage movement is a great way to trigger predictable, standard actions that do not differ based on the individual prospect. However, there may be events that occur during the sales process that are not predictable and require some human discernment or interaction. You can set up note templates to trigger automation for these types of events. The sales rep will add the note template to a contact record manually. The note template will show up under tasks in the bottom row of tabs and will kick off automation (actions) when it is used. Use note templates in conjunction with sales stage triggers to fully automate your sales process.

Example: Your sales team may encounter specific objections while working with a prospect. The opportunity record may be in the "working" stage, but the sales rep needs to be able to track the objection and send a specific follow-up sequence that speaks to a particular objection. If the prospect hesitates because of price, the follow-up sequence will remind the prospect of the value they'll receive for the price and reinforce the value through your existing customer stories and testimonials.

You may need to create multiple note templates for your sales team. Use a naming convention to make it easy for a sales rep to find the right one (e.g. Sales Objection Price). The note template can apply a tag, start a follow-up sequence, and stop a follow-up sequence that is no longer relevant (and much more!)

You may also want to use note templates to track sales rep activity. The note templates show up on the Task/Appt/Note Report.