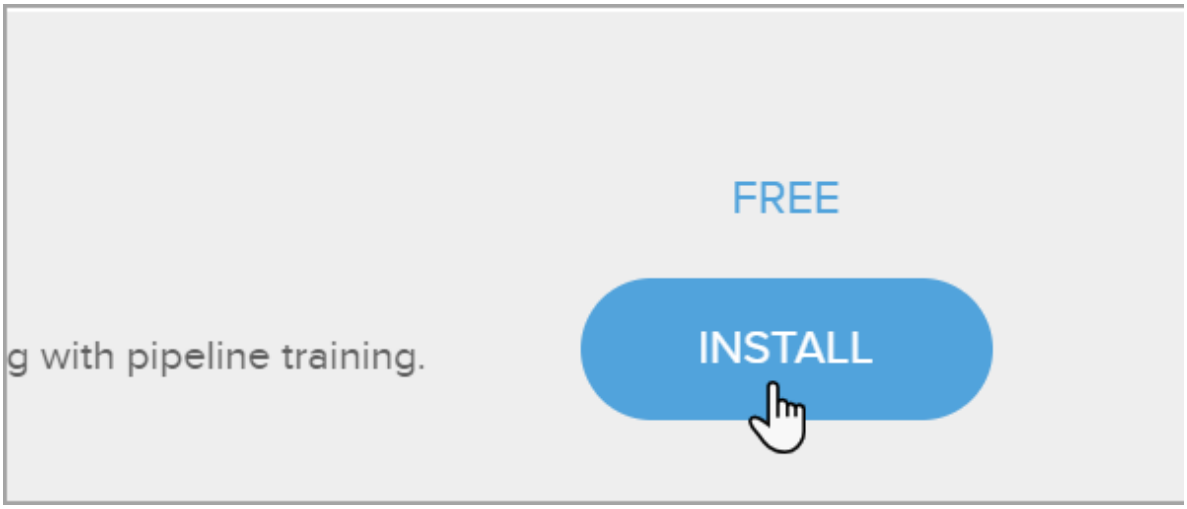
Stage To Stage Pipeline Automation

When a sales rep moves the stage in an opportunity record, Infusionsoft can initiate automation that updates tags, sends an email to the prospect, starts a new campaign sequence, sends internal notification messages, assigns tasks to other users, and more.

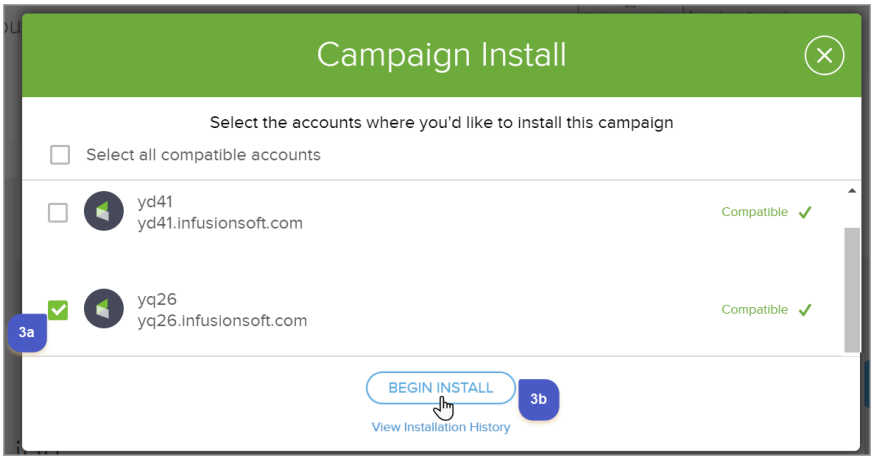
You can run actions based on an opportunity record moving **INTO** a specific stage, or **OUT OF** a specific stage. When you plan the marketing automation strategy for your direct sales process, ask yourself:

- Is this series of actions specific to the newly assigned stage? If the answer is yes, then you will want to assign the action to the movement **INTO** that stage.
- Is the action appropriate regardless of the next stage? If the next stage is irrelevant, then you will assign the action to the movement **OUT OF** the stage. This is less common.

1. Click here to install the "**Stage To Stage Pipeline Automation**" pre-made campaign
2. Click "**Install**"

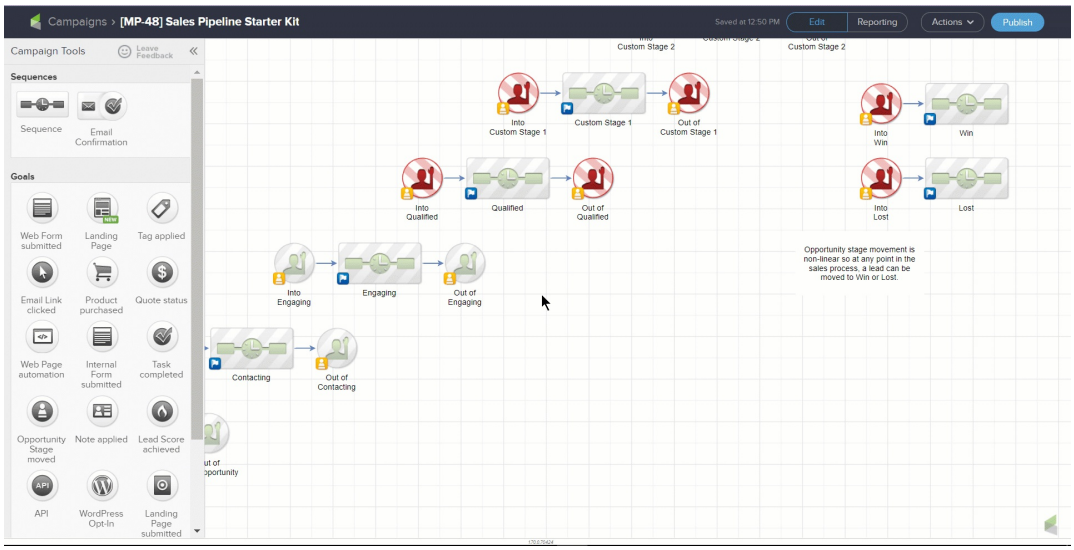


3. Check the box next the app the campaign will be installed & click " **BEGIN INSTALL**"



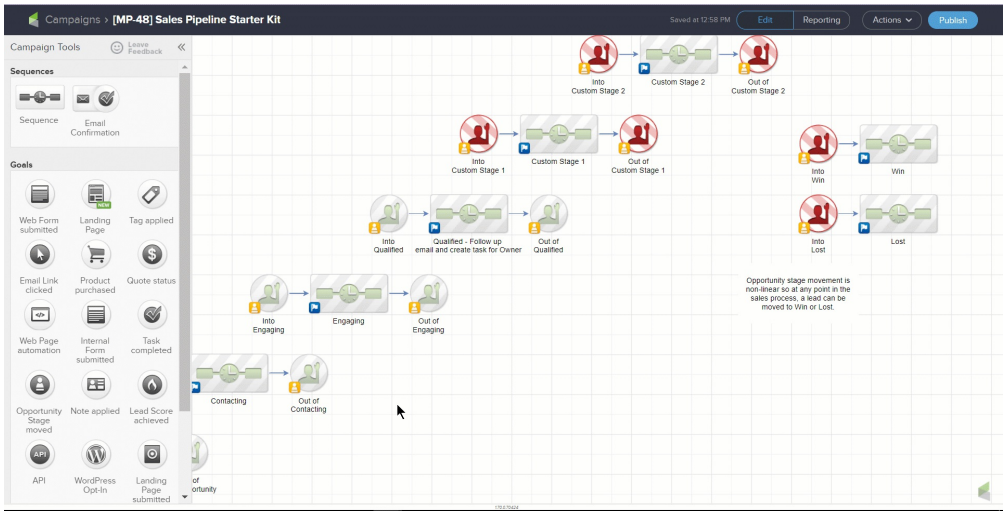
- This campaign starts when an opportunity is moved into the ***New Opportunity*** stage.

Note: Your stage names may be different, so be sure to double-click on the opportunity goals and change the stage drop-down to the appropriate stage. You can also change the description below the goal to match your stage names.



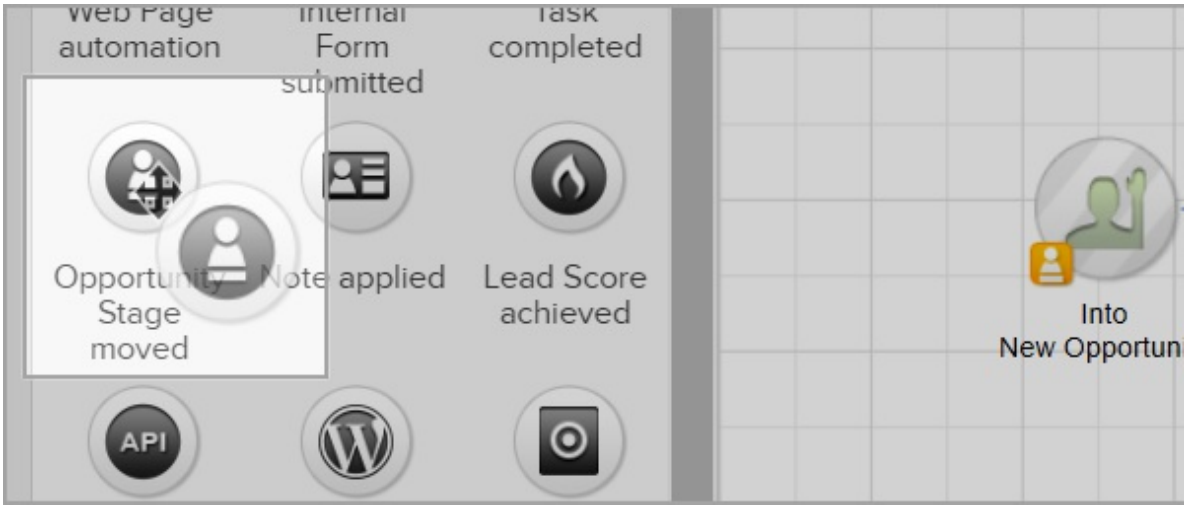
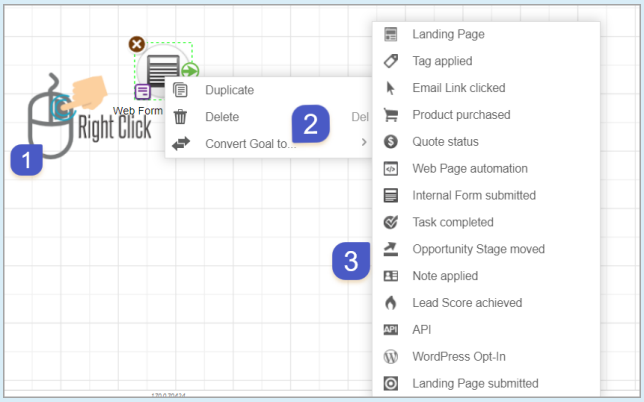
Pro-tip! Click animated gifs to view larger

- Each Opportunity stage that changes moves your contact into a corresponding sequence that automates your business processes.



- Add more **Opportunity goals** and **campaign sequences** to flesh-out your sales process.

- Just drag the **Opportunity goal** or campaign sequence onto the campaign builder canvas.



Pro-Tip! You can change any goal type by right clicking the goal > click "**Convert Goal to**" > followed by clicking the goal type you want to use.