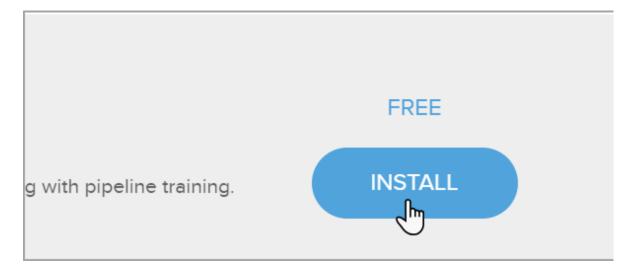
## Stage To Stage Pipeline Automation

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



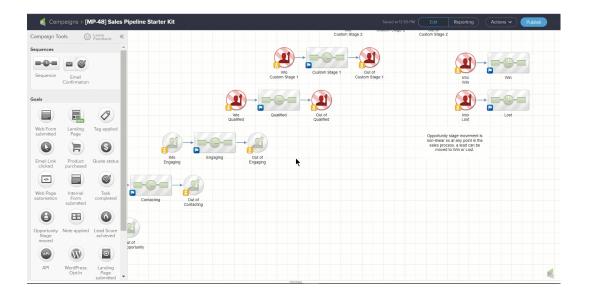
2. Click "Install"

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

u	Campaign Install		$\bigotimes$	
Select the accounts where you'd like to install this campaign Select all compatible accounts				
	yd41 yd41.infusionsoft.com	Compatible	<ul> <li>^</li> </ul>	
3a 🗸 🄇	yq26 yq26.Infusionsoft.com	Compatible	~	
	BEGIN INSTALL View Installation History			

• 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.

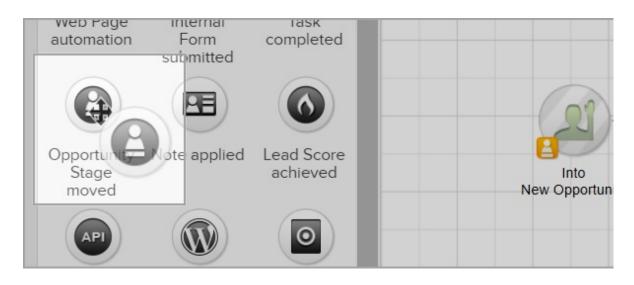


## Pro-tip! Click animated gifs to view larger

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

Campaigns > [MP-48] Sales Pipel	ne Starter Kit Sov	ved at 12:58 PM Edit Reporting Actions v Publish
mpaign Tools 😳 Leave Keedback «	$ \longrightarrow  $	$\rightarrow$ $\rightarrow$ $(1)$
quences	Into Custom:	Stage 2 Out of
-0 0	Custom Stage 2	Custom Stage 2
Sequence Email Confirmation		(1)→ =
als	Into Custom Stage 1 Cut of Custom Stage 1 Custom Stage 1	Into Win
		Win
Web Form Landing Tag applied submitted Page		
0 🗎 6	Into Qualified - Follow up Out of Qualified email and create task for Owner Qualified	Into Lost
Email Link Product Quote status clicked purchased	$(\mathfrak{g}) \rightarrow $	Opportunity stage movement is non-linear so at any point in the sales process, a lead can be
	Into Engaging Out of	moved to Win or Lost.
Web Page Internal Task	Engaging Engaging	
submitted		
portunity Note applied Lead Score Stage achieved	Contacting	
• • • •		
API WordPress Landing of Opt-In Page ortunit		

- 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.

