# Making Status Progressions work for your business

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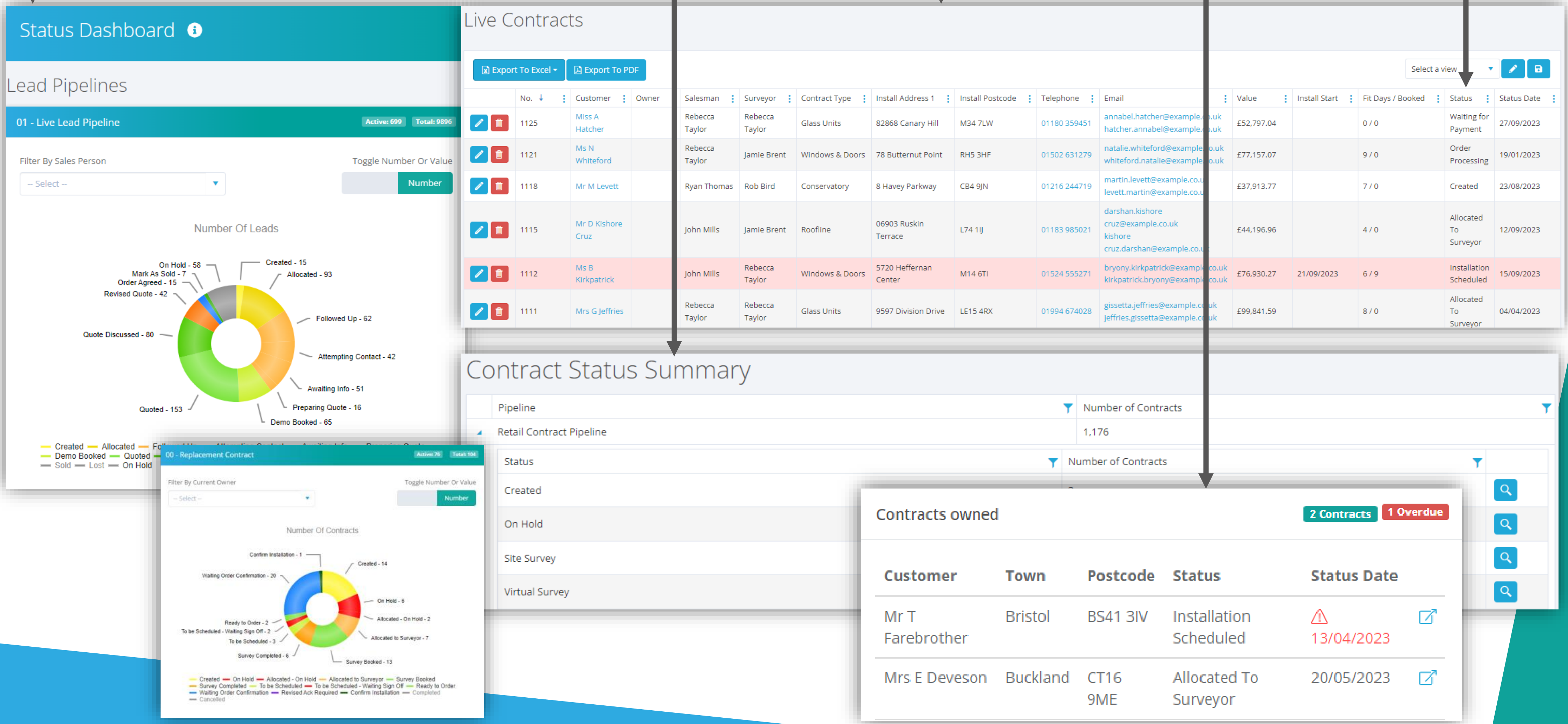
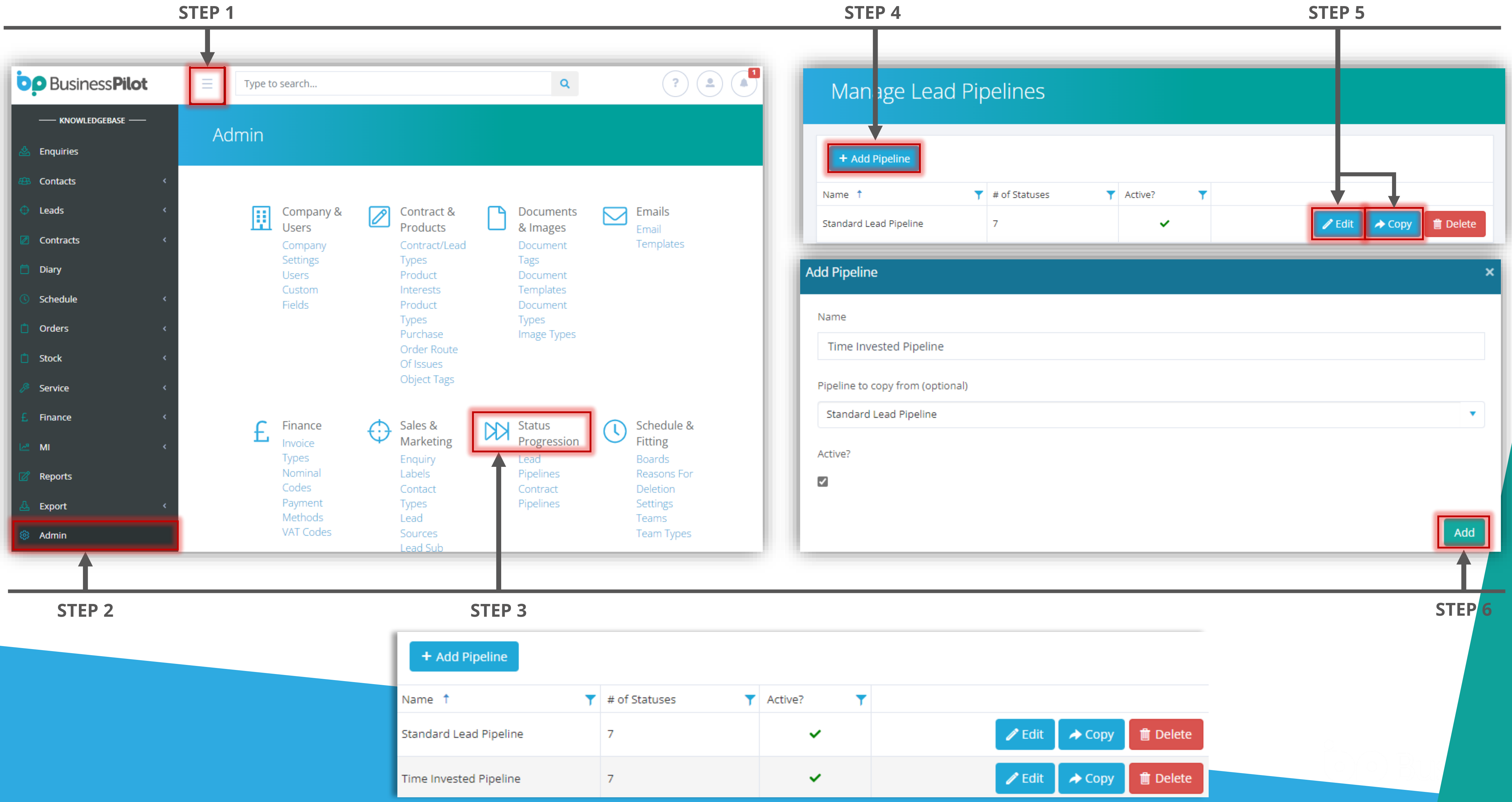
# WHAT WE WILL COVER

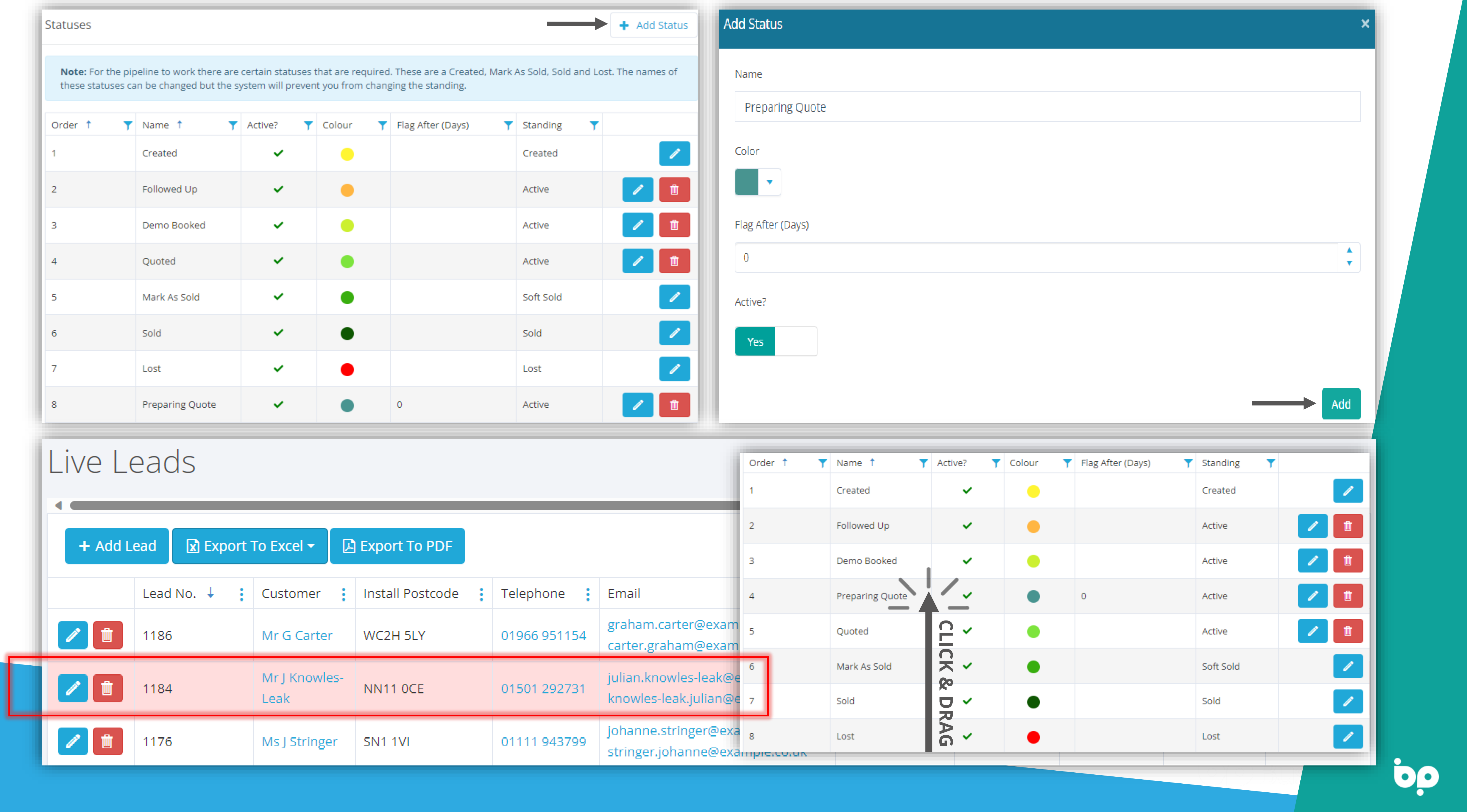
- Creating sales and operations pipelines in the admin area
- Adding progressions through tasks and email notifications to a pipeline and why this customisation is so beneficial to the business and individual users, the customer too!
- Filtering and viewing pipelines throughout the system, reporting, and MI
- Overview of the status summary areas and how they can be used to manage performance

# AREAS WHERE YOU CAN ACCESS PIPELINES

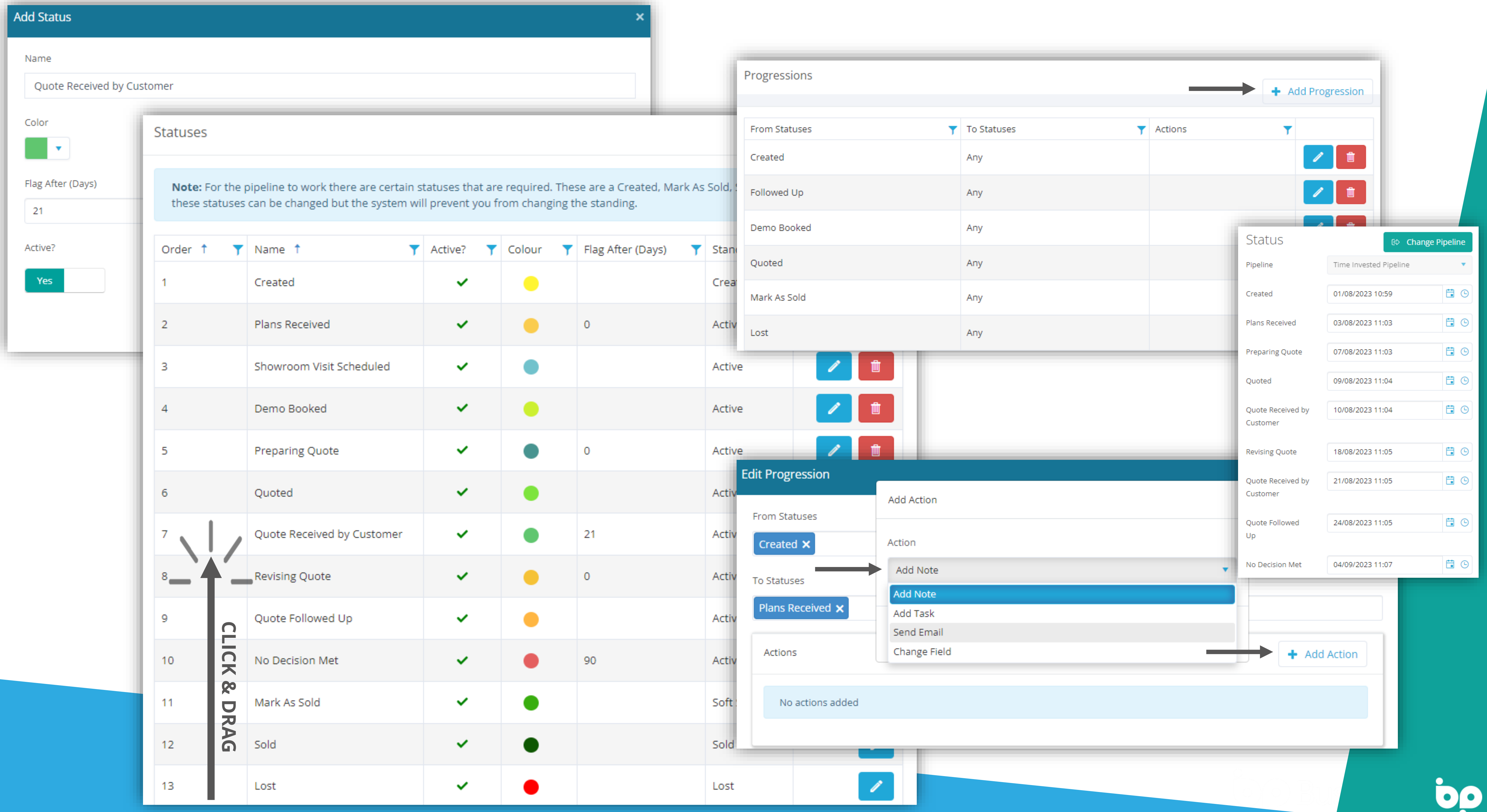


# CREATING PIPELINES

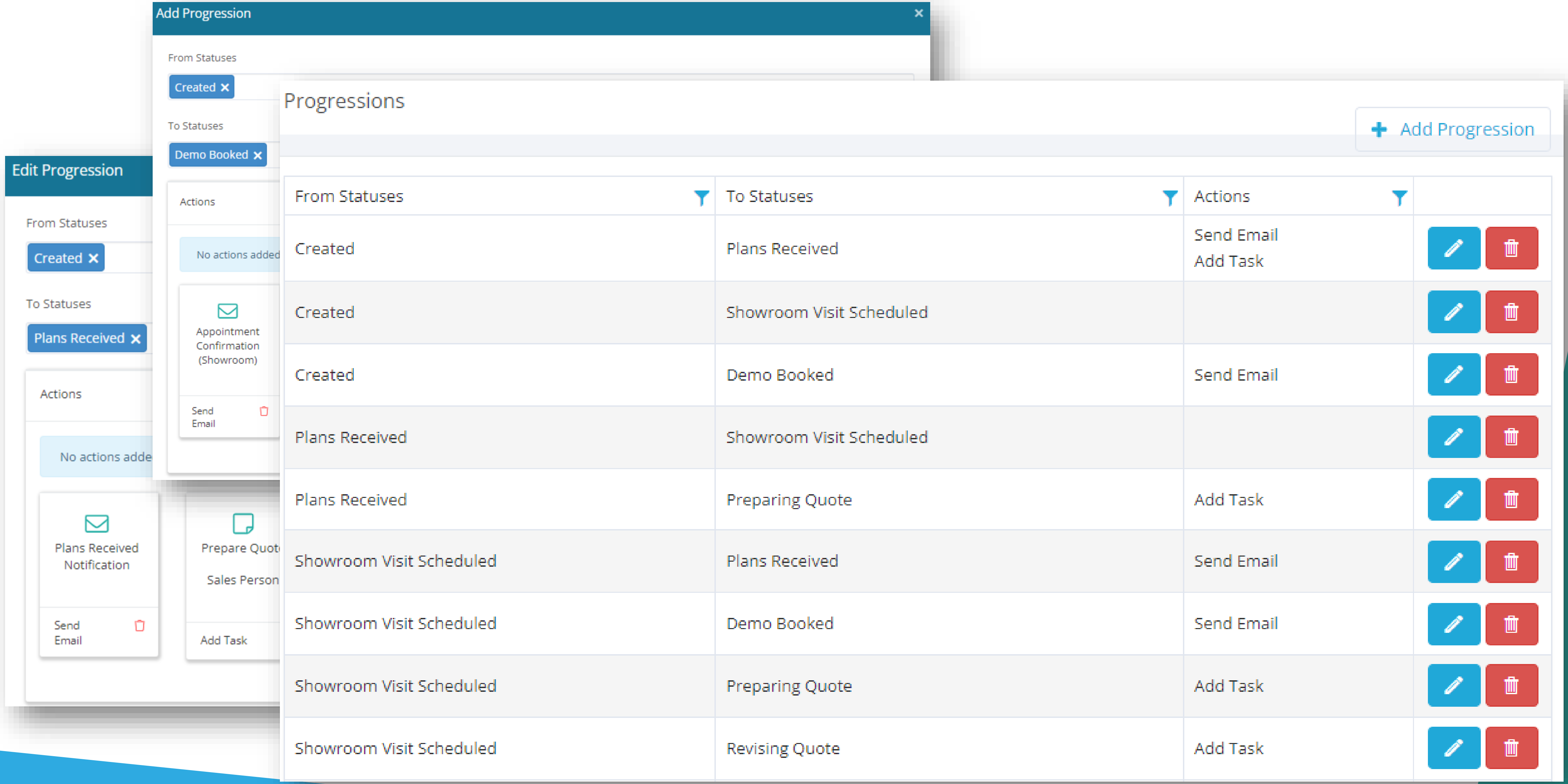




Statuses
Add Status
Note: For the pipeline to work there are certain statuses that are required. These are a Created, Mark As Sold, Sold and Lost. The names of these statuses can be changed but the system will prevent you from changing the standing.
Order
Name
Active?
Colour
Flag After (Days)
Standing
1 Created Created
2 Followed Up Active
3 Demo Booked Active
4 Quoted Active
5 Mark As Sold Soft Sold
6 Sold Sold
7 Lost Lost
8 Preparing Quote 0 Active
Add Status
Name
Preparing Quote
Color
Flag After (Days)
0
Active?
Yes
Add
Live Leads
+ Add Lead
Export To Excel
Export To PDF
Lead No.
Customer
Install Postcode
Telephone
Email
1186 Mr G Carter WC2H 5LY 01966 951154 graham.carter@exam carter.graham@exam
1184 Mr J Knowles-Leak NN11 0CE 01501 292731 julian.knowles-leak@e knowles-leak.julian@e
1176 Ms J Stringer SN1 1VI 01111 943799 johanne.stringer@exa stringer.johanne@example.co.uk
Order
Name
Active?
Colour
Flag After (Days)
Standing
1 Created Created
2 Followed Up Active
3 Demo Booked Active
4 Preparing Quote 0 Active
5 Quoted Active
6 Mark As Sold Soft Sold
7 Sold Sold
8 Lost Lost
CLICK & DRAG



Add Status
Name
Quote Received by Customer
Color
Flag After (Days)
21
Active?
Yes
Statuses
Note: For the pipeline to work there are certain statuses that are required. These are a Created, Mark As Sold,
these statuses can be changed but the system will prevent you from changing the standing.
Order
Name
Active?
Colour
Flag After (Days)
1 Created
2 Plans Received 0 Active
3 Showroom Visit Scheduled Active
4 Demo Booked Active
5 Preparing Quote 0 Active
6 Quoted
7 Quote Received by Customer 21
8 Revising Quote 0
9 Quote Followed Up
10 No Decision Met 90
11 Mark As Sold
12 Sold Sold
13 Lost Lost
CLICK & DRAG
Progressions
Add Progression
From Statuses
To Statuses
Actions
Created Any
Followed Up Any
Demo Booked Any
Quoted Any
Mark As Sold Any
Lost Any
Status
Change Pipeline
Pipeline
Time Invested Pipeline
Created 01/08/2023 10:59
Plans Received 03/08/2023 11:03
Preparing Quote 07/08/2023 11:03
Quoted 09/08/2023 11:04
Quote Received by Customer 10/08/2023 11:04
Revising Quote 18/08/2023 11:05
Quote Received by Customer 21/08/2023 11:05
Quote Followed Up 24/08/2023 11:05
No Decision Met 04/09/2023 11:07
Edit Progression
From Statuses
Created
To Statuses
Plans Received
Add Action
Action
Add Note
Add Note
Add Task
Send Email
Change Field
Actions
Add Action
No actions added


Add Progression
From Statuses
Created
To Statuses
Demo Booked
Actions
No actions added
Appointment Confirmation (Showroom)
Send Email
Edit Progression
From Statuses
Created
To Statuses
Plans Received
Actions
No actions adde
Plans Received Notification
Send Email
Prepare Quot
Sales Person
Add Task
Progressions
Add Progression
From Statuses
To Statuses
Actions
Created
Plans Received
Send Email
Add Task
Created
Showroom Visit Scheduled
Created
Demo Booked
Send Email
Plans Received
Showroom Visit Scheduled
Plans Received
Preparing Quote
Add Task
Showroom Visit Scheduled
Plans Received
Send Email
Showroom Visit Scheduled
Demo Booked
Send Email
Showroom Visit Scheduled
Preparing Quote
Add Task
Showroom Visit Scheduled
Revising Quote
Add Task

# SUMMARY

- Prior to implementing the company's processes, it is beneficial to map them out on paper
- It is possible to create a progression from "Status One" to "Status Two" and "Status Three" to define bespoke actions for each.
- Visit our "All Mighty Trio of Templates" for further actions, updated updates to the customer, and easy re-assignment to the next person/team.
- For testing Progressions, set up a "0 Value" test contract in Business Pilot.