

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

Status Dashboard

Lead Pipelines

01 - Live Lead Pipeline Active: 699 Total: 9896

Filter By Sales Person:

Toggle Number Or Value: Number

Number Of Leads

- Created - 15
- Allocated - 93
- Followed Up - 62
- Attempting Contact - 42
- Awaiting Info - 51
- Preparing Quote - 16
- Demo Booked - 65
- Quoted - 153
- Quote Discussed - 80
- Revised Quote - 42
- Order Agreed - 15
- Mark As Sold - 7
- On Hold - 58

Live Contracts

Export To Excel | Export To PDF

No.	Customer	Owner	Salesman	Surveyor	Contract Type	Install Address 1	Install Postcode	Telephone	Email	Value	Install Start	Fit Days / Booked	Status	Status Date
1125	Miss A Hatcher		Rebecca Taylor	Rebecca Taylor	Glass Units	82868 Canary Hill	M34 7LW	01180 359451	annabel.hatcher@example.co.uk	£52,797.04		0 / 0	Waiting for Payment	27/09/2023
1121	Ms N Whiteford		Rebecca Taylor	Jamie Brent	Windows & Doors	78 Butternut Point	RH5 3HF	01502 631279	natalie.whiteford@example.co.uk	£77,157.07		9 / 0	Order Processing	19/01/2023
1118	Mr M Levett		Ryan Thomas	Rob Bird	Conservatory	8 Havey Parkway	CB4 9JN	01216 244719	martin.levett@example.co.uk	£37,913.77		7 / 0	Created	23/08/2023
1115	Mr D Kishore Cruz		John Mills	Jamie Brent	Roofline	06903 Ruskin Terrace	L74 1IJ	01183 985021	darshan.kishorecruz@example.co.uk	£44,196.96		4 / 0	Allocated To Surveyor	12/09/2023
1112	Ms B Kirkpatrick		John Mills	Rebecca Taylor	Windows & Doors	5720 Heffernan Center	M14 6TI	01524 555271	bryony.kirkpatrick@example.co.uk	£76,930.27	21/09/2023	6 / 9	Installation Scheduled	15/09/2023
1111	Mrs G Jeffries		Rebecca Taylor	Rebecca Taylor	Glass Units	9597 Division Drive	LE15 4RX	01994 674028	gissetta.jeffries@example.co.uk	£99,841.59		8 / 0	Allocated To Surveyor	04/04/2023

Contract Status Summary

Pipeline	Number of Contracts
Retail Contract Pipeline	1,176

Status	Number of Contracts
Created	
On Hold	
Site Survey	
Virtual Survey	

Contracts owned

2 Contracts 1 Overdue

Customer	Town	Postcode	Status	Status Date
Mr T Farebrother	Bristol	BS41 3IV	Installation Scheduled	13/04/2023
Mrs E Deveson	Buckland	CT16 9ME	Allocated To Surveyor	20/05/2023

00 - Replacement Contract

Active: 26 Total: 384

Filter By Current Owner:

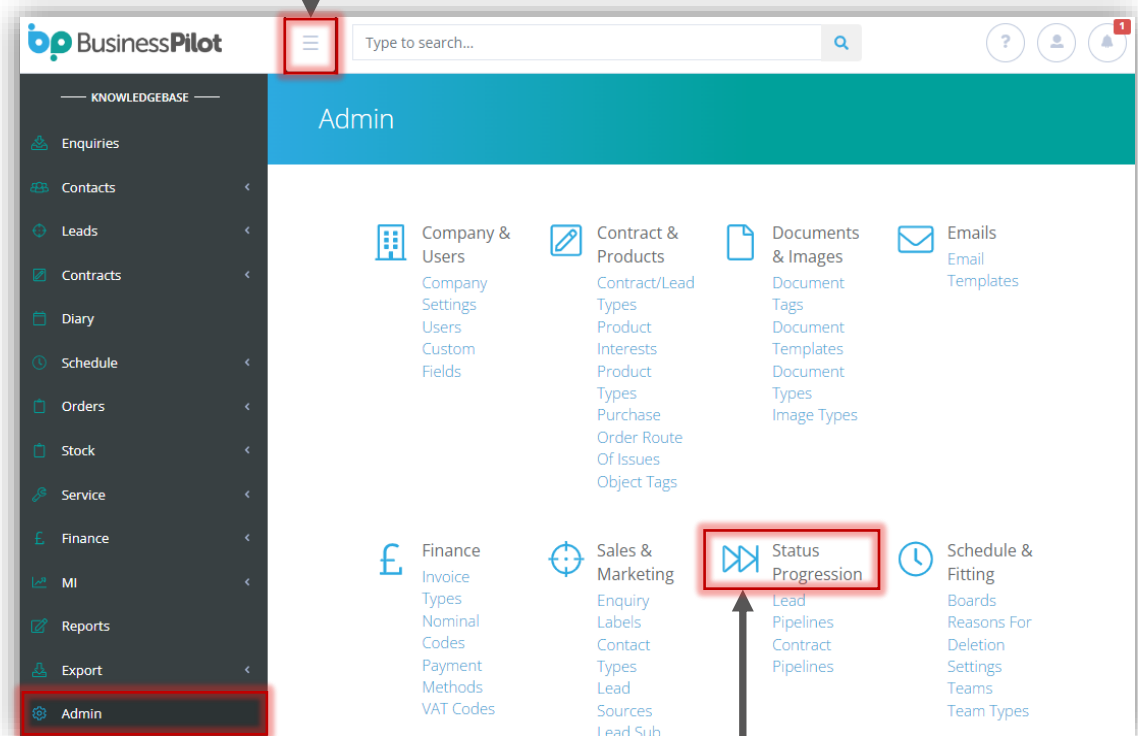
Toggle Number Or Value: Number

Number Of Contracts

- Created - 14
- On Hold - 6
- Allocated - On Hold - 2
- Allocated To Surveyor - 7
- Survey Booked - 13
- Survey Completed - 6
- To be Scheduled - 3
- To be Scheduled - Waiting Sign Off - 2
- Ready to Order - 2
- Waiting Order Confirmation - 20
- Confirm Installation - 1

CREATING PIPELINES

STEP 1

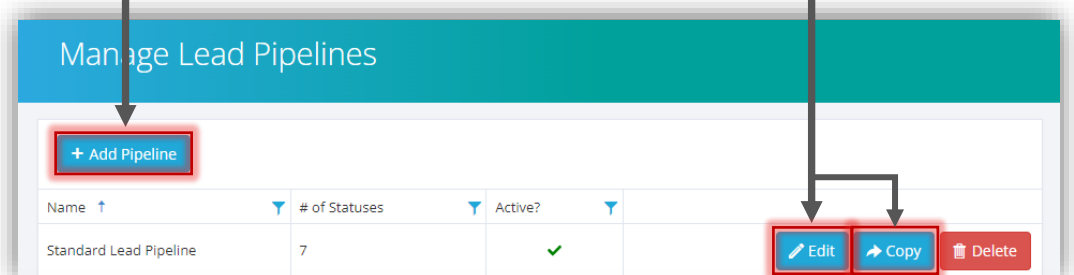


The screenshot shows the BusinessPilot Admin interface. A red box highlights the hamburger menu icon in the top left. Another red box highlights the 'Admin' option in the left-hand navigation menu. A third red box highlights the 'Status Progression' option in the 'Sales & Marketing' section of the main content area.

STEP 2

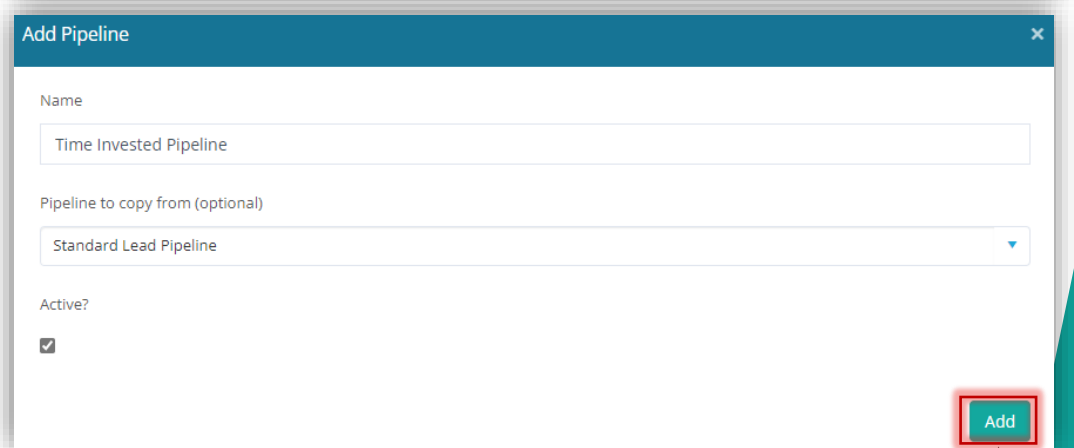
STEP 3

STEP 4



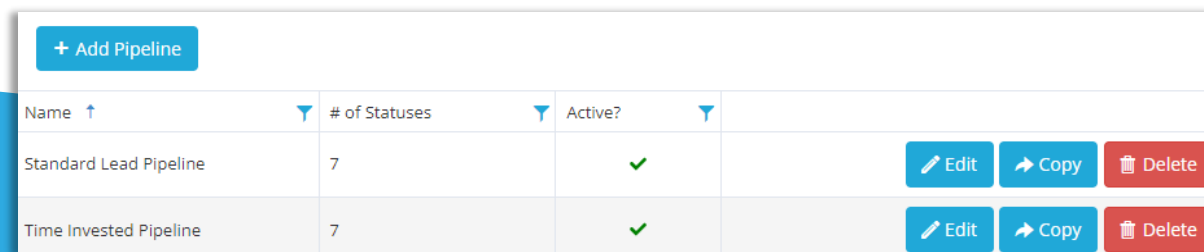
The screenshot shows the 'Manage Lead Pipelines' page. A red box highlights the '+ Add Pipeline' button. Another red box highlights the 'Edit' button for the 'Standard Lead Pipeline' row. A third red box highlights the 'Copy' button for the same row.

STEP 5



The screenshot shows the 'Add Pipeline' dialog box. A red box highlights the 'Add' button at the bottom right. The dialog contains a 'Name' field with the value 'Time Invested Pipeline', a 'Pipeline to copy from (optional)' dropdown menu with 'Standard Lead Pipeline' selected, and an 'Active?' checkbox which is checked.

STEP 6



The screenshot shows a table with two rows of pipeline data. Each row has 'Edit', 'Copy', and 'Delete' buttons. A red box highlights the 'Add Pipeline' button above the table.

Name ↑	# of Statuses	Active?	
Standard Lead Pipeline	7	✓	Edit Copy Delete
Time Invested Pipeline	7	✓	Edit Copy Delete

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

Color

Flag After (Days)

Active?
 Yes

➔

Live Leads

	Lead No. ↓	Customer	Install Postcode	Telephone	Email
	1186	Mr G Carter	WC2H 5LY	01966 951154	graham.carter@example.com carter.graham@example.com
	1184	Mr J Knowles-Leak	NN11 0CE	01501 292731	julian.knowles-leak@example.com knowles-leak.julian@example.com
	1176	Ms J Stringer	SN1 1VI	01111 943799	johanne.stringer@example.com stringer.johanne@example.com

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

Color

Flag After (Days)

Active?

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)	Standa
1	Created	✓	Yellow		Cre
2	Plans Received	✓	Orange	0	Acti
3	Showroom Visit Scheduled	✓	Light Blue		Acti
4	Demo Booked	✓	Light Green		Acti
5	Preparing Quote	✓	Dark Green	0	Acti
6	Quoted	✓	Bright Green		Acti
7	Quote Received by Customer	✓	Green	21	Acti
8	Revising Quote	✓	Yellow	0	Acti
9	Quote Followed Up	✓	Orange		Acti
10	No Decision Met	✓	Red	90	Acti
11	Mark As Sold	✓	Dark Green		Soft
12	Sold	✓	Black		Sold
13	Lost	✓	Red		Lost

CLICK & DRAG

Progressions

[+ Add Progression](#)

From Statuses	To Statuses	Actions
Created	Any	Edit Delete
Followed Up	Any	Edit Delete
Demo Booked	Any	Edit Delete
Quoted	Any	Edit Delete
Mark As Sold	Any	Edit Delete
Lost	Any	Edit Delete

Status

[Change Pipeline](#)

Pipeline: Time Invested Pipeline

Created	01/08/2023 10:59	Calendar Refresh
Plans Received	03/08/2023 11:03	Calendar Refresh
Preparing Quote	07/08/2023 11:03	Calendar Refresh
Quoted	09/08/2023 11:04	Calendar Refresh
Quote Received by Customer	10/08/2023 11:04	Calendar Refresh
Revising Quote	18/08/2023 11:05	Calendar Refresh
Quote Received by Customer	21/08/2023 11:05	Calendar Refresh
Quote Followed Up	24/08/2023 11:05	Calendar Refresh
No Decision Met	04/09/2023 11:07	Calendar Refresh

Edit Progression

From Statuses: Created Plans Received

To Statuses: Any

Actions:

- Add Note
- Add Note
- Add Task
- Send Email
- Change Field

[+ Add Action](#)

No actions added

Add Progression ✕

From Statuses

Created ✕

To Statuses

Demo Booked ✕

Actions

No actions added

Appointment Confirmation (Showroom)



















Send Email

Prepare Quote 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	 

Edit Progression

From Statuses

Created ✕

To Statuses

Plans Received ✕

Actions

No actions added

Plans Received Notification

Send Email

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.