Sales Pipeline Starter Kit

This article applies to:

Max Classic

Please Note! We recommend using the online Strategy Guide to source your campaigns. The Strategy Guide is kept up-to-date with the latest campaigns. This campaign may contain legacy content (e.g, legacy emails, legacy landing pages, etc...)

This article provides instructions and best-practice strategies for setting up the Sales Pipeline Starter Kit campaign that you can download for free from the Keap Marketplace. This campaign gives you all the tools necessary to build an automated, systematic and strategic process for managing the communication between a sales person and their leads.

1. Download the Sales Pipeline Starter kit from the Marketplace

2. Rename your sales stages and publish your campaign

    1. In the main navigation menu, go to CRM > Settings
    2. Click on Sales Pipeline
    3. Click Edit next to "Custom Stage 1" and rename it.
    4. Repeat for "Custom Stage 2"
    5. Click on Opportunity defaults to specify your active sales stages.

    6. Set the Win stage as "Win" and set the Loss stage as "Loss."
    7. Go into the Sales Pipeline Starter Kit Campaign.
    8. Double click on the goal/sequence titles and replace "Custom Stage 1/2" with the actual stage name.
    9. Publish the campaign

3. Setup your dashboard for daily pipeline management

   You need to set up two saved opportunity searches; one that shows your active pipeline and one that lists opportunities that slipped through the cracks.

    1. In the main navigation menu, go to CRM > Opportunities
    2. (optional) Click Start Over to create a new search
    3. Set the following search criteria:
        - Opportunity tab > Stages: All stages selected Except Win/Loss
        - Opportunity tab > Owner: Current User
        - Columns tab > Custom Columns:
            - Contact Name
            - Opportunity
            - Stage
            - Next Action Date
            - Next Action Notes
    4. Scroll down and sort by Next Action Date
    5. Click the OK button.
    6. Click Save
    7. Name it "My Active Pipeline" and check the box to Add this search to the user home
    8. Click Edit Criteria/Columns and set the next action date custom interval to 365 days ago and/or -1 days after today

   9. Click Ok
   10. Click on Options and click Save As and name it "My Overdue Pipeline." Check the box to add this search to the user home.
   11. Hover over the Home icon in the upper right corner of the page and click on Dashboard
   12. Add the following widgets to your dashboard:
       - Calendar Items
       - Tasks and Pipeline Stages
   13. Click Settings at the bottom of the Pipeline Stages widget.
       - Select all stages except the Win/Loss
       - View stages for users we are setting up the dashboard for.
   14. Organize the dashboard according to the video above.

4. Learn how to manage an opportunity record

   You can create opportunities manually or automatically.