

Play Blueprint: Sales Pipeline

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Why Run It: Convert clients by automating a seamless journey from lead to prospect to paying client.

Who It's For: Sales based businesses that need a system to keep track of a multi-step sales and closing process. (But can also be used to track fulfillment processes for businesses with manufacturing or assembly processes)

Implementation time: 45-60min

Play Snapshot

The easiest way to explain the Sales Pipeline play is that it's a digital representation of all your sales opportunities and where they are in your sales process at any given time. Obviously, this represents a great chance to eliminate deals falling through the cracks, but it's also the perfect way to forecast and project sales for the next week, month, or quarter. Individual deals can be moved through the Sales Pipeline, and, based on where a given deal is, automations can be used to create tasks or send emails or texts.

Pro Tip: This play is only as powerful as you choose to make it. Don't be afraid to add in automation and tasks at any stage to ensure the process is moving as efficiently as possible.

[Quick Start Guide](#)

[Play Action Plan](#)

[Measuring Success + What's Next](#)

[Our experts can build this play for you!](#)