



Your Sales Stages (aka Your Pipeline)

* You can add pipeline stages, lead assignments, goals, tasks, and automated email sequences.

LEAD

CRM record created

Qualified

Budget & time in line

Opportunity

Prepare proposal

Working

SOLUTION PRESENTATION

WON / LOST

*Chance for future?

ChemProp

Smith Inc
\$10k-\$12k
Website

PROSPECT!

ChemProp

ChemProp

FUTURE DEALS

ChemProp
\$1500/mo
SEO

