How To:

Set Up and Manage a Sales Pipeline

Learn how to use SharpSpring to manage your sales pipeline, customers, and sales team. In this example, we'll show how a veterinarian's office can set up its own sales pipeline with its customers.

Learn How To:

Create a sales pipeline
Define your sales pipeline with custom stages unique to your business
Track customers and opportunities
Know where your customers are in the sales cycle

Why It's Helpful:

Obtain a projection of your monthly income
Gain a better understanding of where your customers stand
Ensure consistent communication among separate sales processes

Watch And Learn:

This example was part of a SpringBoard Live how-to session. View on-demand video.

The Situation:

For the case of a veterinarian, each client would be in a different stage of the buyer's cycle depending on his or her pet. Some clients may be purchasing a service on a monthly basis (e.g., grooming), whereas some could be considering such a service for the first time.

Through SharpSpring, the vet can create a sales pipeline with processes and stages unique to its business. These processes can be adapted to the specific needs of clients based on their pets, meaning that the vet's office will be able to better manage and organize its prospective sales as it moves closer to a sale.

How To Do It:

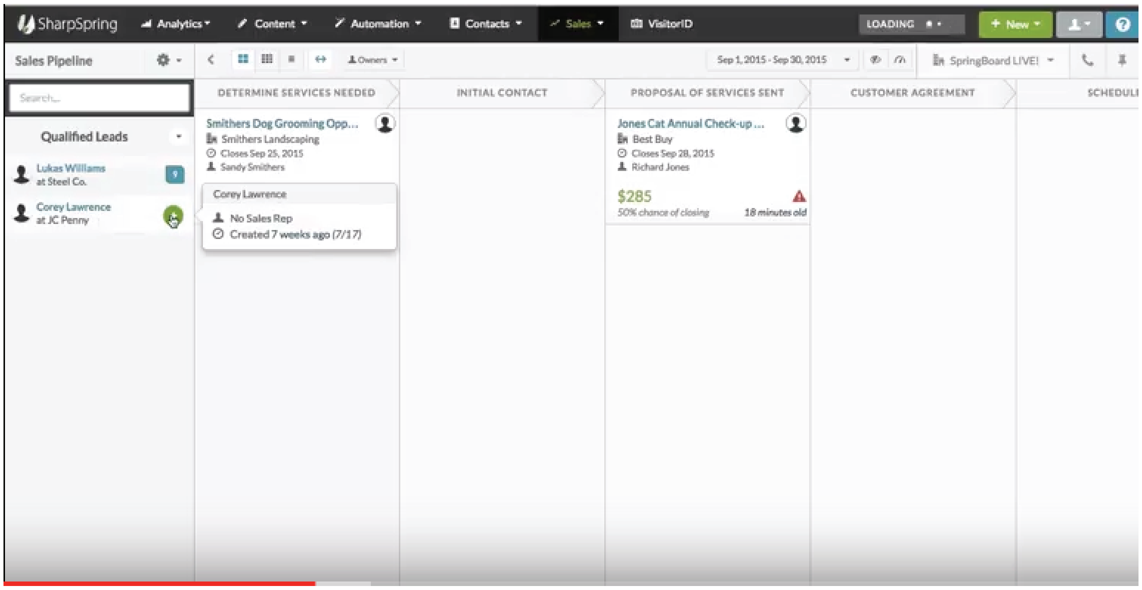
Navigate to the Sales tab in SharpSpring and click Pipeline. You will be presented with your customizable sales pipeline, along with any opportunities you may have.

***SharpTip 1:* If you have a CRM like Salesforce active, the Sales tab will not be available.**

***SharpTip 2:* By clicking on the Owner button near the top of the pipeline, you can filter your pipeline to view each opportunity by who is responsible for the sale or by client. This is useful if you have multiple salespeople working for you.**

Create an Opportunity

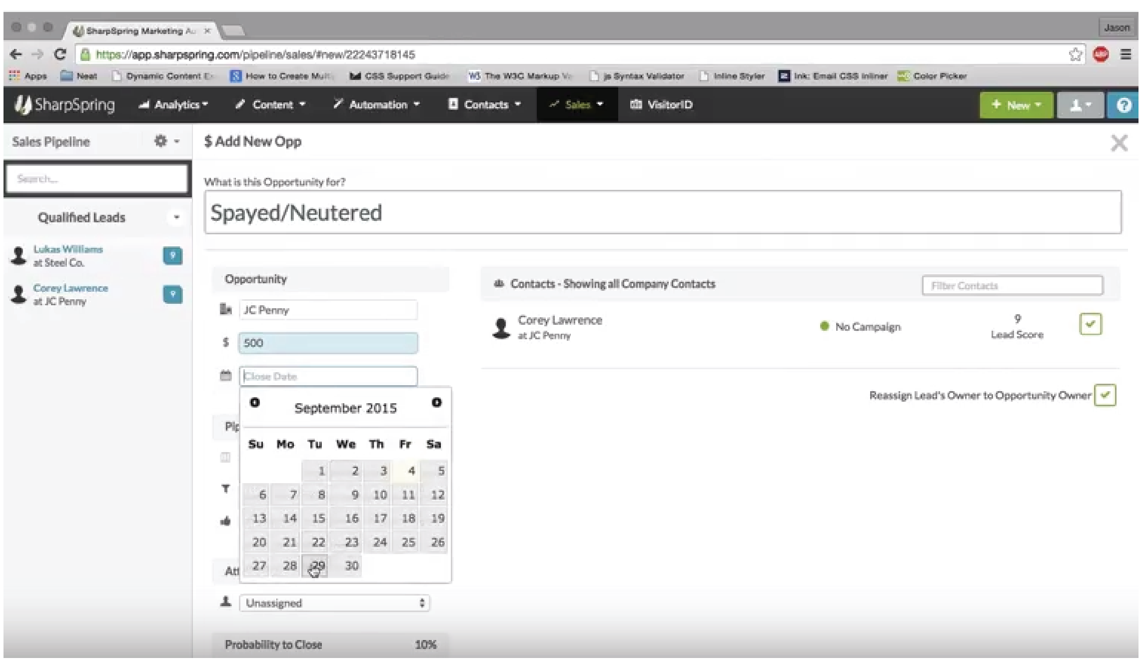
1. Select a lead from the left of the pipeline, and click the green plus button.



2. You'll see a screen where you can change the expected close date, the value of the lead, the name of the opportunity, the pipeline stage in which the opportunity currently is, and finally, who will be assigned to it.

3. Once you're happy with the settings, click Save in the top right of the page to save the opportunity.

4. Now if you view your pipeline, you'll be able to see your new opportunity.

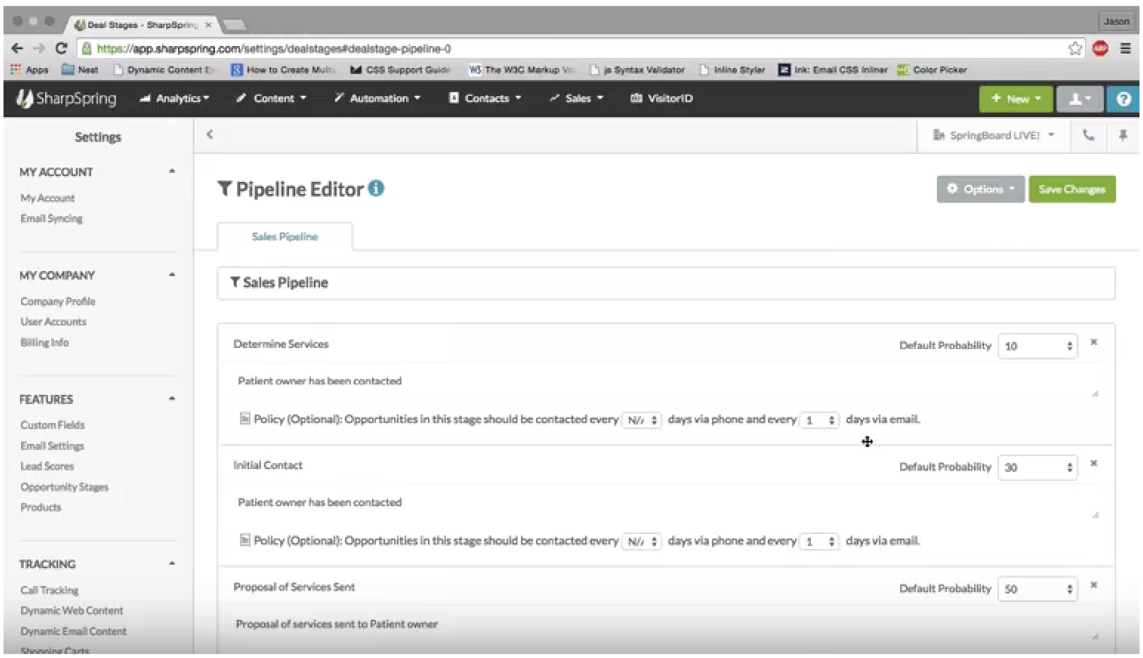


***SharpTip 3:** To move each opportunity along the sales pipeline, simply click and drag the opportunity to the next stage, and SharpSpring will automatically update the status and processes of that particular opportunity.*

Manage Your Sales Pipeline

1. After viewing your pipeline, click the gear symbol on the right and select Edit Pipeline Stages.

2. Now you can rename stages, change stage descriptions and contact rules, or reorder stages by dragging and dropping each section.



3. To add a new pipeline or pipeline stage, select Options, then Pipeline Stage or Sales Pipeline.

***SharpTip 4:** You can see the status of all of your opportunities and leads as well as their progress toward a sale by selecting Sales, then Reports. Any of these reports can be exported to PDF.*