

More Info On:
The Pipeline

2. THE PIPELINE

PROS

Can help enable marketing automation, passing of leads between different teams (qualifying->converting), large-scale nurturing of prospects

CONS

Multiple users, takes effort to set up automation (and may be only available on premium and with some email platforms)

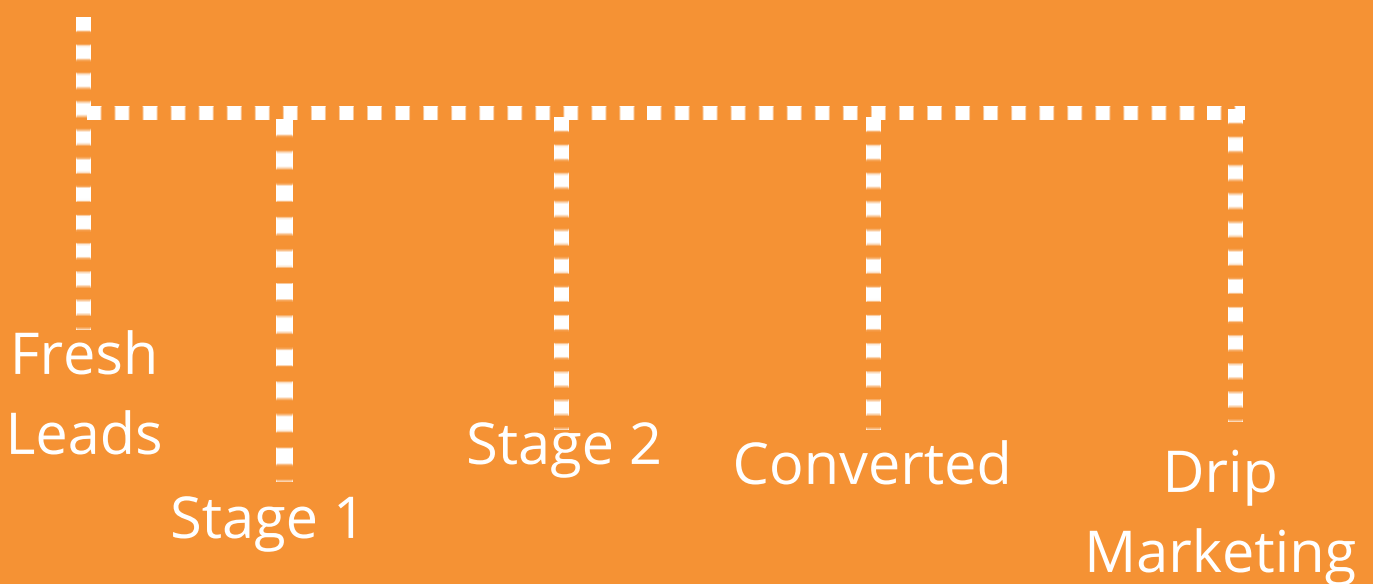
USE IF

You have a sales process which involves at least two steps and tends to follow roughly the same course

BEWARE:


Check what your sales process is, and whether your email platform and subscription type support marketing automation

New leads enter here



2. THE PIPELINE

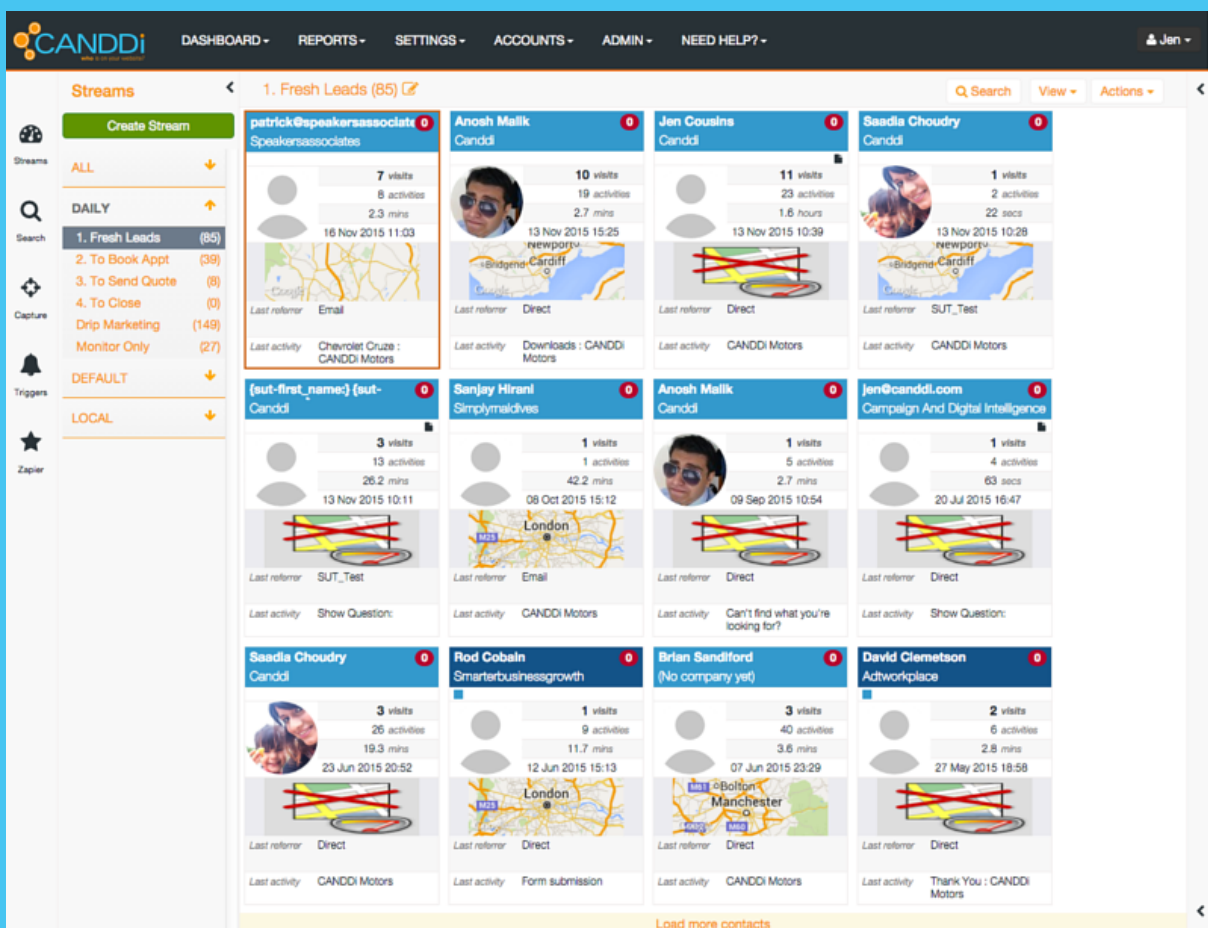
The Pipeline allows you to easily track your prospects through the sales funnel. It can also potentially help you to automate some of your sales activity, and makes it streamlined for different team members to play different roles on the same prospect's funnel.

DAILY 	
1. Fresh Leads	(85)
2. To Book Appt	(39)
3. To Send Quote	(8)
4. To Close	(0)
Drip Marketing	(149)
Monitor Only	(27)

Once a Fresh Lead has clicked through a tracked email introduction of mine, they move down the funnel. (I can also skip them along)

The "To Book" stream is shared with my telesales team, who call the visitors up and try to book them in.

When the prospect has had an appointment from an engineer, they move into the To Close stream, so the engineers know who they still need to follow up with. All this time the team can judge website/marketing engagement of prospects in order to decide when to move them on or engage with them, improving the prospect's experience of us, and our success rate.



The screenshot shows the CANDDI dashboard interface. At the top, there are navigation tabs: DASHBOARD, REPORTS, SETTINGS, ACCOUNTS, ADMIN, and NEED HELP?. The user 'Jen' is logged in. The main section is titled 'Streams' and shows '1. Fresh Leads (85)'. A sidebar on the left contains a 'Create Stream' button and a list of streams: ALL, DAILY (selected), 1. Fresh Leads (85), 2. To Book Appt (39), 3. To Send Quote (8), 4. To Close (0), Drip Marketing (149), Monitor Only (27), DEFAULT, and LOCAL. The main content area displays a grid of 16 prospect cards. Each card includes a profile picture, name, company, and key statistics: visits, activities, and last activity. For example, the first card for 'patrick@speakersassociates' shows 7 visits, 8 activities, and a last activity of 'Email' on 16 Nov 2015. Other cards show various activities like 'Downloads', 'Form submission', and 'Show Question:'. A 'Load more contacts' button is visible at the bottom of the grid.

Marketing Automation

If a prospect stops answering our emails/calls, we put them in "Drip Marketing".



Our CANDDi integrates with Mailchimp, for example, to automatically send these prospects regular email campaigns, to make sure they remember us until they're ready.

That way when they do want to engage again (like when the new budget comes in!) they'll come on our website to have a look.

We have alerts set on all streams to alert the relevant person if one of these prospects comes back on our website, since that's when they will be hot to contact!

hello@canddi.com
to me

16:41 (9 minutes ago)

CANDDi
who is on your website?

Visit CANDDi

Individual notification
Tue Nov 17 2015

Jen Cousins has been assigned to you. [VIEW FULL PROFILE >>](#)

Personal
Name: Jen Cousins

Contact Info
Company: Canddi
Email: saadia@canddi.com
Phone: (No phone yet)
Address: (No address yet)

Summary
Total visits: 10
Total duration: 1.8 hours
First visit: 02/09/2015
Last visit: 10/11/2015
Total activity: 69

Top 3 Tags

Tags	Score
converted	17
customer	9
logged in	9

Last Location

[More About Alerts](#)

If you like the sound of the Pipeline, let your account developer know and they can discuss with you the best way to set it up to capture the info and the categories that suit your business best. Never lose track of a lead.

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