# Fulfillment Stages Worksheet

**Use this worksheet to organize your Fulfillment Stages on paper before setting them up in your Infusionsoft.** Use Fulfillment Stages to track where customers are in the fulfillment process when there are many stages and processes to keep track of and it's important to not miss a step or let a customer fall through the cracks. Fulfillment Stages are a great way to ensure your customers receive great value and receive it on time.

**Stage #:** Skip numbers between stages to allow for new stages to be inserted without the need to renumber the entire sales pipeline. If you're also using the pipeline for sales stages, you can begin your fulfillment stages at #100 to avoid confusing the stage numbers with the sales stages.
**Target Days**: Ideal number of days someone should be in this stage before requiring a stage move. It's an estimate.
**Probability**: This field can be used differently for Fulfillment stages than how it's used for Sales stages. For fulfillment, the Probability can be used more as a completion percentage. ie. When someone gets to this stage, their fulfillment process is 50% complete. Probability = 50%. The number should increase with each stage progression, with the final stage showing 100%.
**Checklist (manual tasks)**: What manual tasks, if any, should be checked off as completed before being able to move to the next stage.
**Automated Action** = Things that should be done in an Infusionsoft contact record at this stage, like assigning a task, applying a note, sending an email or voice message. Anything that can be automated.

| Infusionsoft Stage # | Stage Name | Target Days | Checklist[1] (manual tasks) | Req (Y/N) | Automated Actions |
|---|---|---|---|---|---|
| 100 | | | | | |
| 105 | | | | | |
| 110 | | | | | |
| 115 | | | | | |

| Infusionsoft Stage # | Stage Name | Target Days | Checklist[1] (manual tasks) | Req (Y/N) | Automated Actions |
|---|---|---|---|---|---|
| 120 | | | | | |
| 125 | | | | | |
| 130 | | | | | |
| 135 | | | | | |
| 140 | | | | | |
| 145 | | | | | |
| 150 | | | | | |
| 155 | | | | | |

[1] **Re Checklist Items**
Checklist items should be phrased as past-tense since the idea is that they should already be completed before checking off. You can also task people to complete checklist items. So how do you decide whether to use a task or a checklist item?

Glad you asked, because there's often some confusion about whether and when to use checklist items or tasks. Hopefully this helps clarify the difference so you can decide for yourself.

Task belong in the Automated Actions column above, so they can be automatically assigned via the Fulfillment Process campaign. Tasks have to be checked off as completed and checking them off can trigger automation to happen, if set up that way. Checklist items (only if set as required) have to be checked off in order to be able to move an opportunity record to a different stage. So the questions to ask yourself in deciding which to use or to use both are:

1. Do I want to track when the task was completed? Phrased another way, Do I want to see a record of the completed tasks in the contact record? If yes, you need a task. Checklist items are not recorded in the contact record history.

2. Do you want to trigger automation upon completion of the task? If yes, you need a task.

3. If you want a stage to be moved after a specific manual task is completed (ex. don't move the stage until after you've mailed the contract), then you can prevent it from being moved if the item is not checked off by having a required checklist item. This is the best use of the opportunity checklists.

For certain things, all of these answers might be yes. In which case you need both a checklist item and a task.