Sales Pipeline Worksheet

Use this worksheet to organize your Sales Stages on paper before setting them up in your Infusionsoft. Use Sales Pipeline Stages to track where customers are in the sales process. Especially when there are many stages and processes to keep track of and it's important to not miss a step or let a prospect fall through the cracks. Sales Stages are a great way to ensure your hard earned leads are not neglected.

Stage #: Skip numbers between stages to allow for new stages to be inserted without the need to renumber the entire sales pipeline.
Target Days: Ideal number of days someone should be in this stage before requiring a stage move. It's an estimate.
Probability: If a prospect makes it to this stage, what is the % probability they will buy? Put that number in this column. The number should increase with each stage progression as you get closer and closer to the sale.
Checklist (manual tasks): What manual tasks, if any, should be checked off as completed before being able to move to the next stage? These items can be made required or not required. Indicate your preference in the Req (Y/N) column.
Automated Action: Things that should be done in Infusionsoft to a contact record, like assigning a task, applying a note, sending an email or voice message.

Infusionsoft Stage #	Stage Name	Target Days	Probability %	Checklist[1] (manual tasks)	Req (Y/N)	Automated Actions
1						
5						
10						
15						

Infusionsoft Stage #	Stage Name	Target Days	Probability %	Checklist[1] (manual tasks)	Req (Y/N)	Automated Actions
20						
25						
30						
35						
40						
45						
50						
55						

[1] **Re Checklist Items**
Checklist items should be phrased as past-tense since the idea is that they should already be completed before checking them 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 around this. 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.