Growth Zone Sales Funnel   Part I - Initial Setup
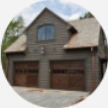
Cheri Petterson

Agenda

- Overview of Sales Funnel Module
- Initial Setup for Sales Funnel
  - Sales Sources
  - Sales Stages
  - Sales Opportunity Status Reasons
  - Auto-Reminders
  - Time-line Items
- Setting up your Sales Proposal Template

Overview

- The Sales funnel is a module that allows you to track the progress of various opportunities from Lead to Win...

- Opportunities may include:
  - New Memberships
  - Membership Upgrades
  - Volunteers or Prospective Board Members
  - Exhibitors for an Event

Overview

Sales Funnel Report

- The **Sales Funnel Report** provides you with many ways to analyze the opportunities in your funnel

- For Example, you may analyze based on salesperson, sales source, sales probability and so on

Results

Contact Name ⇕	Default Email ⇕	Default Phone ⇕	Sales Person ⇕	Estimated Close Date ⇕	One Time Value ⇕	Recurring Value ⇕	Sales Source ⇕
Antiques on Main	dgoerges@mailinator.com	218-999-7654	Cheri Petterson	4/28/2017	$25.00	$1,200.00	Tradeshow
Blossoms		215-777-9876	Cheri Petterson		$25.00	$1,200.00	Email Campaign
Cooking with Susie	soverholser@mailinator.com		Matt Anakkala	4/28/2017	$25.00	$1,200.00	Email Campaign
Ginny's Photography		218-99-1234	Cheri Petterson	6/16/2017	$25.00	$1,200.00	Email Campaign
Hooks	nancy@mailinator.com		Cheri Petterson		$0.00	$0.00	Cold Call
Lacies Floral	lacies@mailinator.com		Sheryl Rassler		$25.00	$1,200.00	Email Campaign
Lilliputts	lpetterson@mailinator.com		Cheri Petterson	4/28/2017	$25.00	$1,200.00	Email Campaign
Maison de Chocolat	frank@mailinator.com		Matt Anakkala		$25.00	$1,200.00	Email Campaign
McBlooms Floral		215-999-6543	Cheri Petterson		$25.00	$1,200.00	Email Campaign
Morgan Golf Club		2185647788	Cheri Petterson	4/28/2017	$25.00	$1,200.00	Email Campaign
Silver Casino			Sheryl Rassler		$25.00	$1,200.00	Email Campaign
The Garage Museum	wharkens@mailinator.com		Cheri Petterson	5/5/2017	$25.00	$1,200.00	Email Campaign
The Malt Shop	jmalt@mailinator.com		Brandon Zinda	5/26/2017	$25.00	$1,200.00	Email Campaign
The New Bakery		216-897-0000	Cheri Petterson	6/9/2017	$25.00	$1,200.00	Email Campaign
The Ski Hill			Cheri Petterson	3/29/2017	$25.00	$1,200.00	Email Campaign
Count\Average\Totals	15				$350.00	$16,800.00	

Sales Sources

- **Sales Sources** are used to track how you learned of the opportunity. Examples of Sales Sources might include referral, trade-show, walk-in and so on.

- You can associate your sales sources to opportunities to help you understand where your opportunities are coming from, and if you win you can look back to see what sales source it came from.

- [WIKI: Setup Sales Sources](#)

Sales Stages

- **Sales stages** allow you to identify the level of engagement a prospect has had with your sales team

- You may define sales stages that match your business processes. Examples of stage may include hot, warm, cold and so on. You may customize these to meet your needs
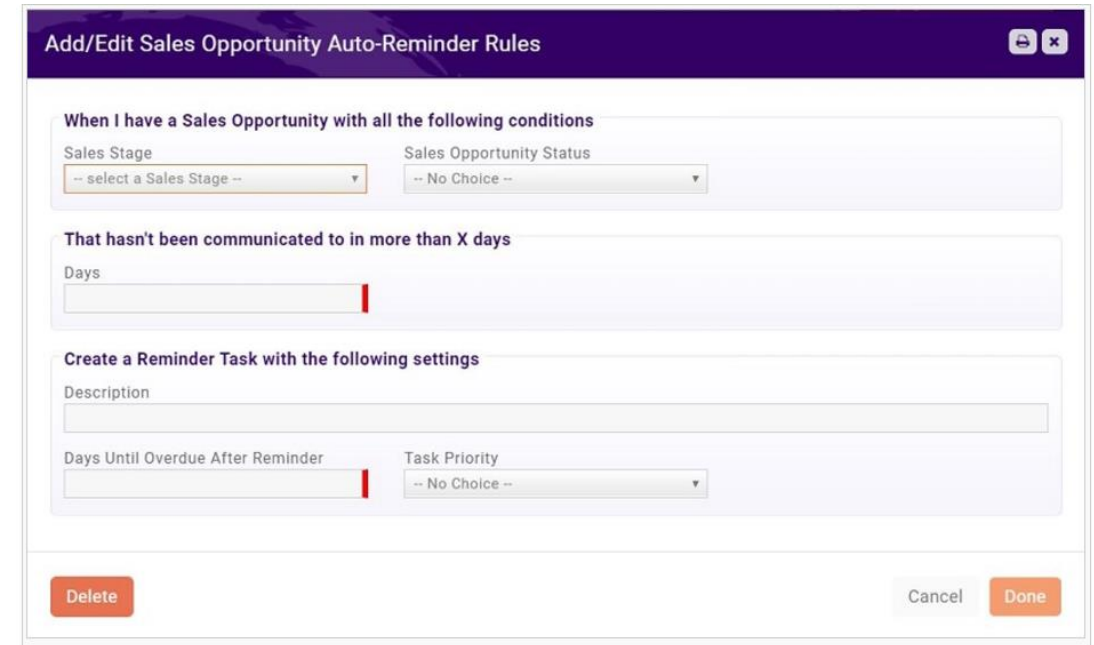
- WIKI: Setup Sales Stages

Sales Opportunity Status Reasons

- **Sales Opportunity Status Reasons** allow you to identify why an opportunity may be stuck in a particular status

- For Example, you may have a status called on-hold, and provide a reason such as "Expense" that tells you the cost of the sale may be too much

- WIKI: [Setup Sales Opportunity Status Reasons](#)

Sales Opportunity Auto-Reminders

- Automatic-Reminders Rules may be setup to notify staff of opportunities that have not been communicated to in a configurable number of days

- WIKI: Setup Auto-Reminders

Time-line Items

- Your sales opportunity milestones can be tracked with timeline items
- Examples of milestones may include when this first became an opportunity, or when you sent the proposal
- You can customize standard timeline items on the **Setup** page
- WIKI: Setup Timeline Items

Automating Timeline Items

- You can automatically update your timeline with a timeline item for new opportunities and when a proposal is accepted
  - **Timeline Item Applied To New Opportunities (General Settings)**
  - **Timeline Item Applied To Signups (Proposal Settings)**

- **WIKI: [Automating Timeline Items](#)**

Create Proposal Template

- If your sales proposals follow a similar pattern, you may create a template where the standard items are already filled in, and customize it when needed.

- A sales proposal template is included in your database. It is formatted to pull in key information, such as the logo information, contact information and so on. for the sales opportunity. If needed, you can customize this template to meet your needs.

- WIKI: Create Sales Proposal Template

Questions?