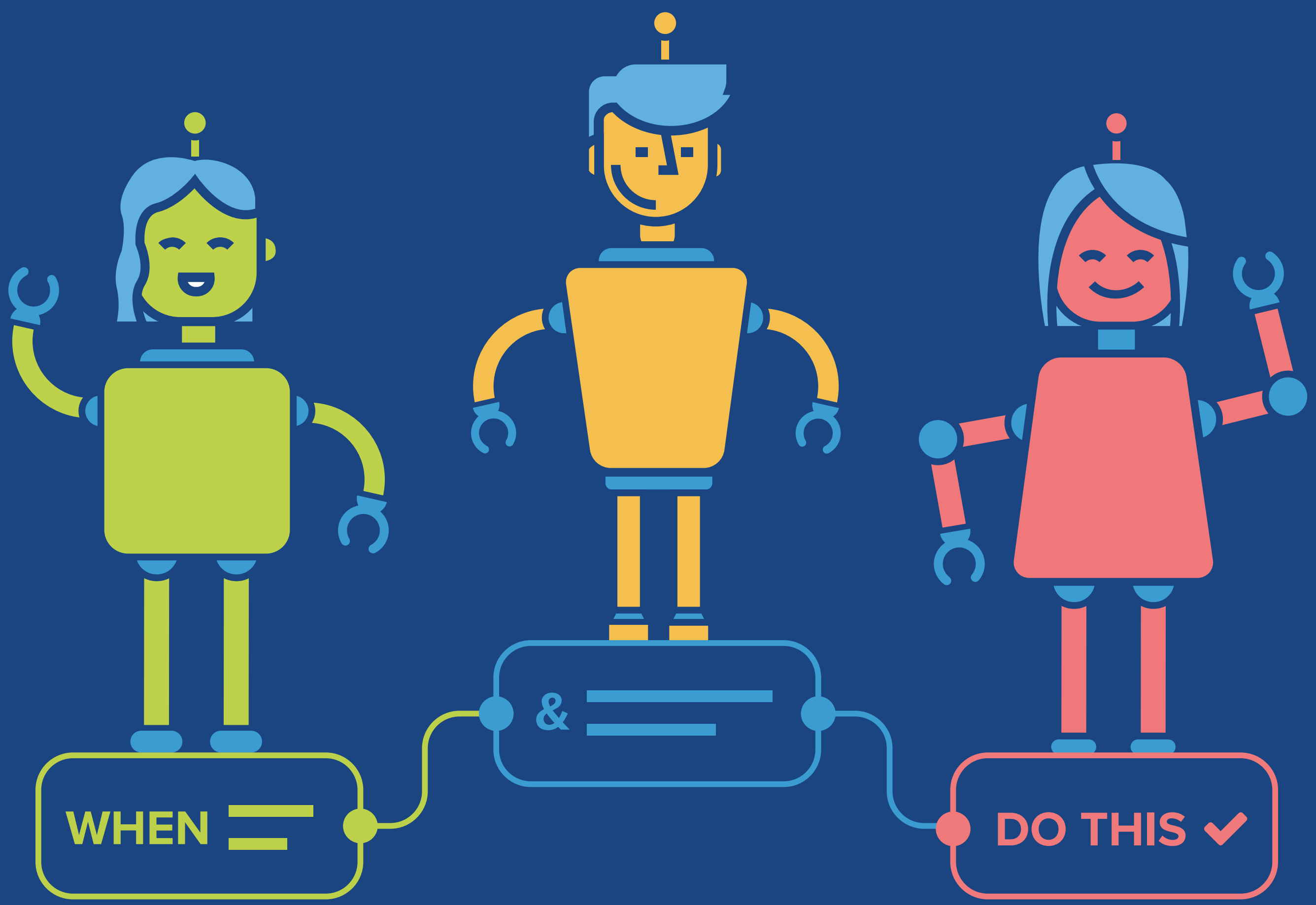
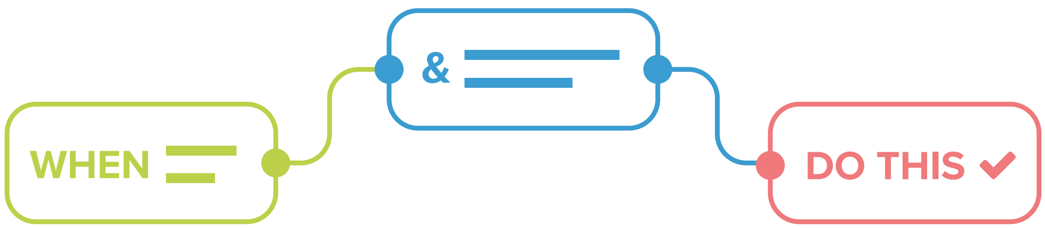
PipelineDeals

Automations playbook



An introduction to Automations

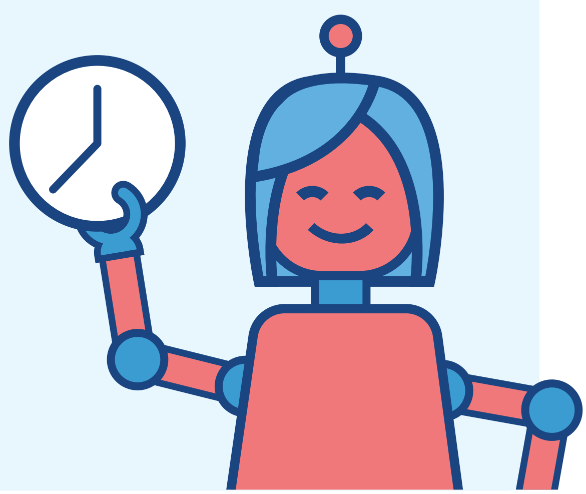
Take the manual effort out of data entry, and kick off automatic workflows and notifications, so you can spend more time closing deals.



Automations are the future of the sales profession — they save time and help you work smarter. With them, you can add the most efficient workflows to your sales process. Free up time for selling and engaging your leads across multiple channels for greater success. Allow your sales team to focus on their most valuable tasks. They'll get activity reminders, suggested next steps, and easily share progress across their team as leads move through the sales pipeline to become closed deals.

Why Automations?

- Free Up Time
- Never Manually Input What You Don't Have To
- Never Miss a Task
- Create Efficient Workflows
- Engage Leads Without Thinking Twice
- Get Important Tasks Done on Autopilot



In this playbook, we'll cover three popular Automations:

1. Create a follow-up cadence when a new deal is added.
2. Set up alerts when certain activities take place.
3. Update custom fields when a deal hits a certain stage.

Automation #1

Automate important follow-ups.

Forgetting follow-ups or next steps is unacceptable. Automations solves this problem by enabling you to create a follow-up cadence when a new deal is added.

Every company has a certain follow-up cadence that its sales team should follow for success.

WHEN...

a deal is created

...DO THIS:

Apply a Todo Template:

Todo template *

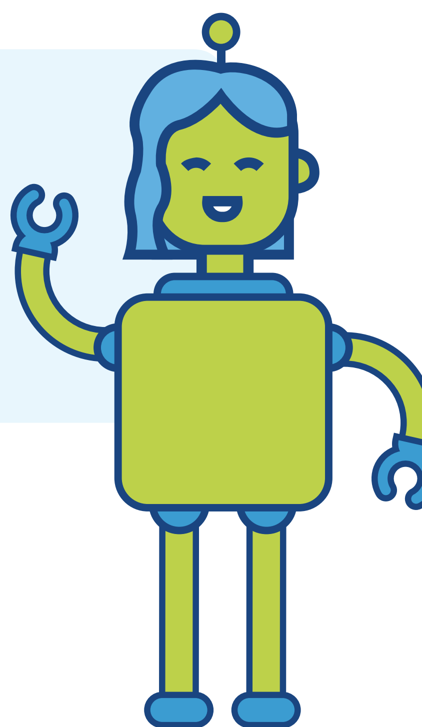
Deals — Sales Template

Task owner:

Triggered Deal Owner

Tip:

Automations ensures the right notifications are triggered so there are no excuses. The result? 100 percent follow through, happier customers and happier sales teams.



Automations is part of the **Grow** Plan.

Upgrade today to take advantage of this powerful feature!

Automation #2

Automate activities alerts.

In any sales process, alerts are critical to ensure proper communication happens. With Automations you can be alerted when certain activities take place. You can set up an automation to trigger a notification whenever a specific activity type is created.

WHEN...

a activity is created

and ALL of these conditions are true:

Note category is

Important Milestone

...DO THIS:

Send a notification

To *

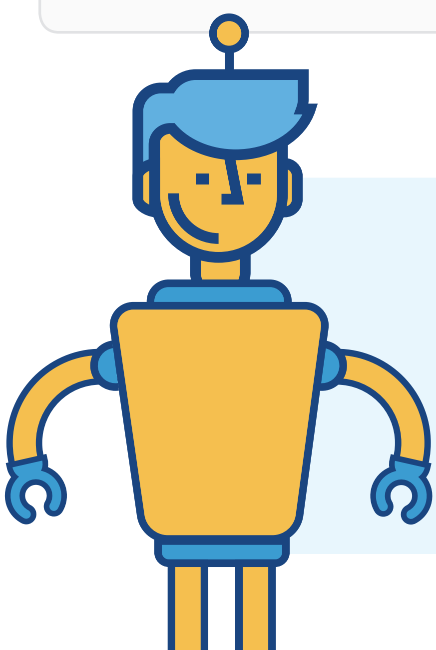
Success Team

Subject*

Important Milestone reached

Body*

Heads up, team! An Important Milestone was reached. Next steps will be to schedule a call and touch base.



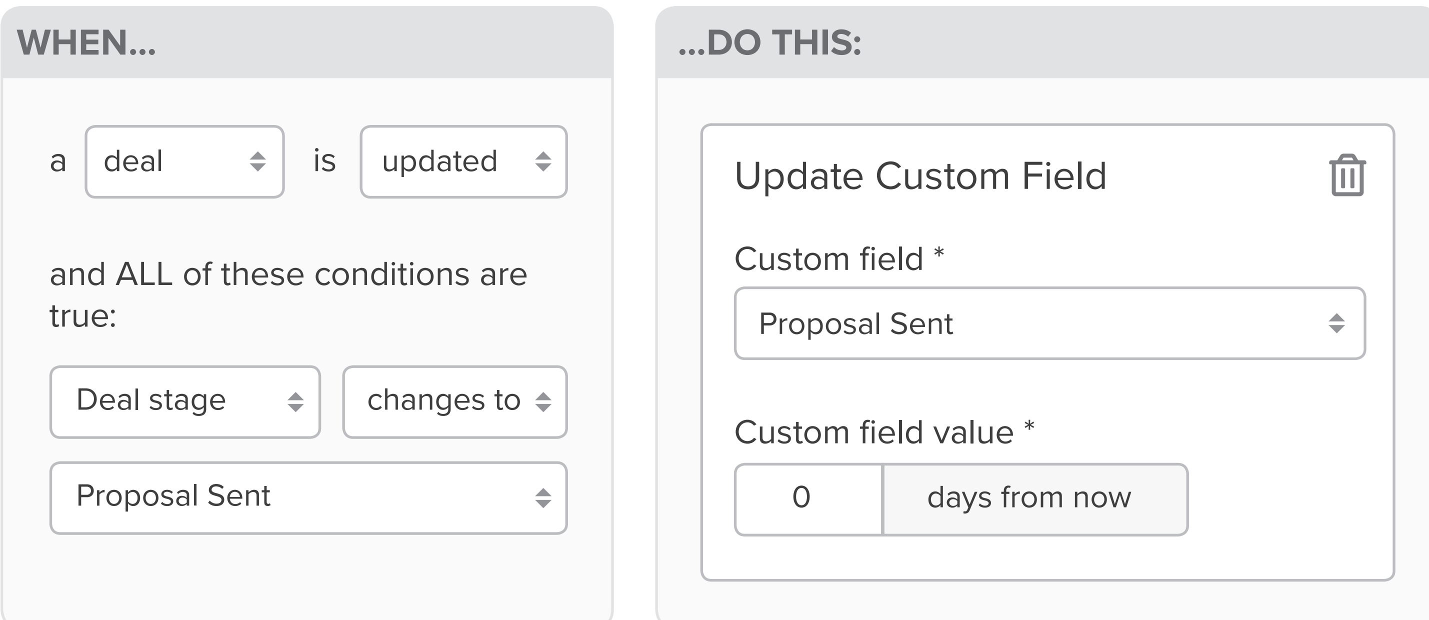
Tip:

Update once, update everywhere. Automations instantly notify the right team members when deals are closed, milestones are reached, and more.

Automation #3

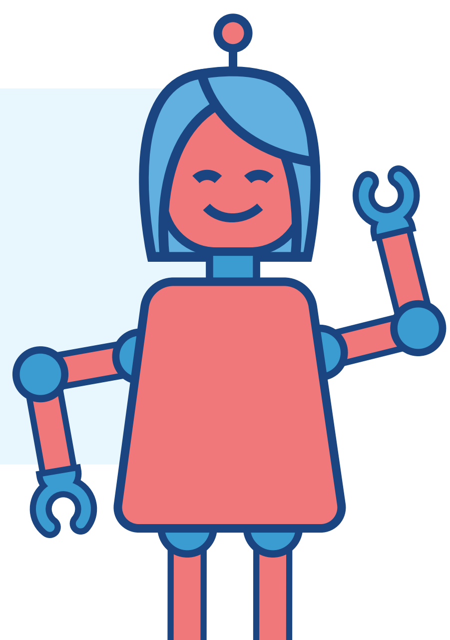
Update custom fields automatically.

As you work through the stages of a deal, you may find yourself manually updating a certain custom field, every time you hit a certain stage in that deal. Automate that process so you don't have to think about it again.



Tip:

With Automations, you can be sure that the right custom field is automatically updated whenever specific criteria are met.



Don’t just take it from us.

PipelineDeals users around the world are automating their sales process each and every day and seeing the ROI.

“The new updates for the PipelineDeals Automation tool have given us a way to streamline our processes to minimize the tedious and repetitive updates. This lets us focus on our clients and the projects that drive growth for our company.”

— Grant Hensarling, Database Manager at WLS Companies

Read how WLS is set to triple revenue with PipelineDeals. ⟶

Users Love Us

“One of the best features is the Automation you can set up when you sign a deal: it notifies everyone!”

— Joshua T., G2 Validated Reviewer

“The customizable deal stage workflow and task Automation really helped us onboard our clients more quickly, and has the flexibility required by a sales process that is still in a maturing phase.”

— Romain H., G2 Validated Reviewer

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Admins, click here to upgrade now.

Contact Customer Care with any questions: +1 (866) 702-7303