



Company Lead Status

Status	Description
Prospect	Contact at a Company who we would like to do business with but no action has been taken
In Progress	Contact who is actively being pursued
Customer	Company has an active deal in the Onboarding Pipeline
Lost	Lost Opportunity
Inactive	Outreach has been made, no activity at this time
DQ	The lead is disqualified
Purge	Contact needs to be deleted (e.g. contact is no longer with company, contact does not exist)

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Contact Lead Status

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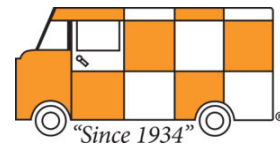
Sales Pipeline



Stage	Description
Discovery	In active sales conversation; establishing fit, openness to investigate and seriousness to pursue a potential business relationship. Establish expectations, trade-offs, an resource allocation; Presented services and products, but a proposal has not been given
Proposal	A proposal has been given to the lead for their review & address issues
Closed – Won	Lead is now a customer
Closed - Lost	Did not win account; need to give reason for losing account

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Onboarding Pipeline



Stage	Description
Schedule Install	Schedule installation & first delivery
Installation	First Delivery; input date field
Intro Team	Second Delivery & intro team
Third Delivery	Third Delivery; schedule 2 week check in and record in date box
2 Week Check in	Check in with client; identify & address any issues
30 Day Check in	Check in with client; identify & address any issues
45 Day Check in	Check in with client; identify & address any issues Survey sent upon completion

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