

## **Sales Automation Workflow en CRM Pipedrive 2020**

### **Opportunity validation**

- Use of "Leads" functionality when it is not necessary to create a deal, in order to find out before creating it as a deal and keep it out of the sales funnel with effective and valid deals
- Every time a user changes the owner of a business , notify the new user

### **Create deals**

- Every time a deal is created, create a "Call" type activity to contact the prospect.
- That Pipedrive can automatically record the closing date for deals in a particular funnel
- Every time a deal moves to "Discovered Needs", create a "Proposal Preparation" type activity to prepare and send the quote to the prospect.
- Each time an activity of a certain type in the funnel is marked as completed, a new sales activity of certain type
- Every time a deal is created, a certain product is added to the deal based on certain pre-filled attributes

### **Creation and submission of proposals and quotes**

- Every time a deal is moved to "Proposal sent", create a next activity of type "Call" to follow up on the respective x days

### **Follow up on proposals and quotes**

- Every time a Monday is reached, that Pipedrive can issue a report by mail called