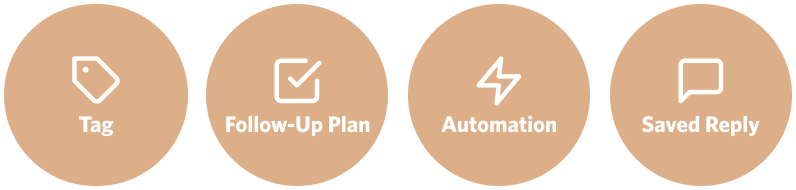
PIPELINE **STAGES**

Your pipeline is a set of stages that mark where each lead sits between acquisition and becoming a client. Each stage represents a step in your sales relationship and has a clear outcome that moves the lead to the next stage. Naming those stages, along with the outcome each one needs, is where the build starts.

PIPELINE COMPONENTS

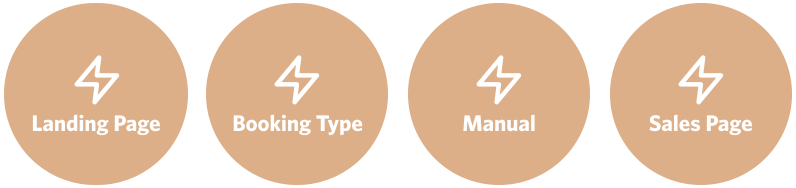


Each pipeline stage is built with three main elements: a **tag** that marks who's in what stage, a **follow-up plan** that provides a repeatable to-do list for each contact in that stage, and an **automation** that applies & removes these, so you're always clear on who's who and what's next. **Saved replies** are message templates that help streamline your communications across stages.

INSIDE THE AUTOMATION

In AttractWell, Automations bundle actions into a single step, keeping your pipeline clean and organized. When a lead in Stage 1 enters Stage 2 of your pipeline, the Stage 2 automation **removes** the Stage 1 tag and follow-up plan from the contact, and **applies** the Stage 2 tag and follow-up plan.

PIPELINE IN ACTION



Automations can be applied to your contacts manually (on the contact card) or run automatically based on conversion events. Example: Stage 1 goal is a discovery call, so Stage 2 automation connects to discovery call booking type. Stage 3 goal is to close the sale, so Stage 4 automation connects to sales page, removing Stage 3 to-dos and tag after sale.

FREE DISCOVERY **CALL**

STAGE 1 NEW PROSPECT

GOAL: Book a discovery call. Stage 1 Automation attaches to lead intake (landing page form, info request). Applies the New Prospect tag and a follow-up plan with to-dos to connect on LinkedIn, reach out weekly to build rapport, and add notes.

STAGE 2 CALL BOOKED

GOAL: Call held, offer made. Stage 2 Automation attaches to discovery call booking. Applies the Call Booked tag and a follow-up plan with to-dos to prep for the call and prepare the proposal. Removes the Stage 1 tag and follow-up plan.

STAGE 3 PROPOSAL SENT

GOAL: Agreement and payment. If the call goes well and an offer is made, Stage 3 Automation is run manually from the contact card. Removes the Stage 2 tag and follow-up plan, applies the Proposal Sent tag and a follow-up plan to check in on days 2, 5, 8, and 14.

STAGE 4 CLIENT

GOAL: Onboarding. Stage 4 Automation attaches to point of sale. Removes the Stage 3 tag and follow-up plan, applies the Client tag, starts the onboarding follow-up plan. Onboarding campaign, call package, or vault access can be attached to this automation to complete onboarding.

STAGE 1 NEW PROSPECT

GOAL: Opportunity revealed. Stage 1 Automation is applied manually from the contact card when a new connection is made. Applies the New Prospect tag and a follow-up plan with to-dos to engage on social weekly, pick up the conversation, and add notes. When you recognize a clear opportunity to help, apply Stage 2 automation.

STAGE 2 INVITE

GOAL: Book a 1:1 or RSVP for event. Stage 2 Automation is applied manually when you recognize an opportunity to invite them to review information. Applies the Invite tag and a follow-up plan with to-dos to prepare your invitation and send it. Removes the Stage 1 tag and follow-up plan.

STAGE 3 SHARE

GOAL: Share + get a yes. Stage 3 Automation is applied manually once they commit to meet. If offering call booking, the automation can be attached to the booking type instead. Applies the Share tag and a follow-up plan with to-dos to prepare for sharing and to follow up after the 1:1 or event for 30 days if not enrolled. Removes the Stage 2 tag and follow-up plan.

STAGE 4 ENROLLED

GOAL: Onboarded. Stage 4 Automation is applied manually once the contact is enrolled with your company. Applies the Enrolled tag, an onboarding follow-up plan, and a welcome campaign (optional) to help your new customer or teammate get started. Removes the Stage 3 tag and follow-up plan.

PAID FIRST SESSION **+ PACKAGE**

STAGE 1 LEAD

GOAL: Book a paid intro session. Stage 1 Automation attaches to lead intake (landing page form), or is applied manually from the contact card for referrals. Applies the Lead tag and a follow-up plan with to-dos to send a welcome message and follow up at intervals.

STAGE 2 INTRO SESSION PAID

GOAL: Commitment to package. Stage 2 Automation attaches to intro session booking (or the sales page with embedded booking, since payment and booking happen in one step). Applies the Intro Session Paid tag and a follow-up plan with to-dos to send session prep and recommend a package after the session. Removes the Stage 1 tag and follow-up plan.

STAGE 3 PACKAGE BOOKED

GOAL: Onboarded. Stage 3 Automation attaches to the package sales page. Removes the Stage 2 tag and follow-up plan, applies the Package Booked tag, starts the onboarding follow-up plan. Vault access, call package, or onboarding campaign can be attached to this automation to complete onboarding.