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How To Create An Automated Sales Pipeline



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As a 21st century entrepreneur, you have to accept that you are replaceable. But that isn't a bad thing. Not by a longshot.

With all the technology freely available to modern entrepreneurs, being replaceable is a fantastic thing.

You get to hire and delegate, freeing up your schedule, and with a little automation, you can accomplish absolutely anything.

Why?

Because you get to focus on the most important things.

As Steve Jobs once said, “If you want to achieve a goal, you have to learn how to turn down the interesting work that distracts you from your priorities. You have to

have focus, and say no to the thousand other great ideas you have.”

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e easier to automate than others.

lly submit invoices? Get an accounting software.

Want to send out awesome email campaigns? Piece of cake with all the email marketing providers out there.

However, all of these automation hacks rely on something happening.

But what if nothing happens?

Is it possible to trigger an automation when something doesn’t happen?

Every automation software, IFTTT, and Zapier relies on something happening. The action then serves as a trigger for the actions that follow.

If you used them for sales automation, you could trigger an email when a prospect responds. Trigger a notification when they say yes to your offer.

But what if you need to follow up with someone who never responded?

Fortunately, I've found a way to create an automated sales pipeline.

A complete pipeline solution; regardless of whether your prospects get or don't get in touch with you.

And because sales automation is one of the most important things we can do to grow our businesses and achieve our goals, we've decided to create a new

sales dashboard.

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Sales Are Better than Sliced Bread

In my belief, you don't need some \$10,000 solution to manage your sales pipeline.

Often, providers will charge you exorbitant amounts because they know **the success of your business depends on your sales pipeline.**

Without a sales pipeline, you don't have an organized way of receiving new leads and advancing them through your funnel until they've become customers.

Without a sales pipeline, your sales reps are forced to jot down lead information on post-its. They don't have a structured way of assembling information on every single lead and figuring out the best way to convert them.

To put it simply: without a sales pipeline, you have no way of understanding your sales process, opportunities, and all the deals you lost and won.

And if you want to succeed from month to month, growing your sales numbers and your revenue, you need to understand your sales intimately.

I'm talking about understanding your sales process as intimately as you understand your best friend.

You have to know its strengths (what your product, reps, and leads are good at), weaknesses (the objections you have to address), opportunities, and threats.

When you have a sales pipeline, you can accurately predict your results.

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your sales pipeline is automated, your reps don't have to dane tasks an algorithm could accomplish. Instead, on the things only *they* can do.

That sounds a lot like the idea of the replaceable founder, right?

Well, they share something in common: they clean tasks off your plate, so you can focus on the most important ideas and responsibilities.

The same thing happens with your salespeople when you've got an automated sales pipeline.

Automated sales pipelines are even more important if you're still in the growth stage of your business.

You can't spend hours chasing down leads or poring over analytics to understand what you're doing wrong. You have to get the best results you can. Fast.

How We Created Our New Sales Dashboard

Now that we've covered the basics, it's time to talk specifics.

When I was working on the sales dashboard, I knew I wanted one thing — one thing that was really hard to come by:

Automation triggered by inaction.

Typically, your sales pipeline actions will only be triggered when leads do something. But what happens when they don't do anything?

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scenario.

You... you... of really important leads, but you're sending automatic emails every day. You can't manually track everyone who never responded.

I mean, you *could* — but then you wouldn't get a 4-hour workday. You'd get a 24-hour workday.

Usually, the leads who don't respond after the first email drop out of your sales pipeline. Regular tools don't provide a way of getting in touch with them again. If they don't respond, they're out.

This obviously sucks. You *need* those leads.

Maybe your email just got lost.

Knowing that we set out to create an automated sales pipeline that could be triggered by inaction as well as action.

Here's what we did:

1. The Brain of the Pipeline

First, we built a **spreadsheet**.

(Spreadsheets hate aside for a second, they're great at helping you organize your work. You can get and feed them data, and gauge all the insights you

need to boost your numbers ASAP.)

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'es as the backbone of our sales system.

ring us all the information we need.

Date	New Leads	New Past 7 Days	New Past 30 Day	Contact Made / Appt Scheduled	Qualified	Qualified Past 7	Qualified Past 3	Unqualified Leads	Unqualified Past 7	Unqualified Past 3	Closed Won	W
STATS	0	0	15		0	0	0	0	0	0	0	0
09/17/2019	2											
09/18/2019					2							
09/19/2019	3										1	
09/20/2019	5				1							
09/21/2019												
09/22/2019												
09/23/2019					2							
09/24/2019	3				1							
09/25/2019	1									1		
09/26/2019										1		
09/27/2019												
09/28/2019												
09/29/2019												
09/30/2019	1				1							
10/1/2019												
10/2/2019												
10/3/2019												
10/4/2019												
10/5/2019												
10/6/2019												
10/7/2019												
10/8/2019												
10/9/2019												
10/10/2019												
10/11/2019												

On the front end, we set up a Trello board.

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If you've seen some of our previous boards, you'll notice that it's expanded quite a bit. Cue the need for a more structured, automated sales pipeline.

We don't want to be leaking leads, but maximizing the profits we get from them.

2. Leads and Actions

We're using our Trello board as our HQ for this one.

We've set up columns for:

1. New leads
2. First contact
3. Attempted second contact
4. Attempted third contact

5. Attempted final contact

When contact or appointment made

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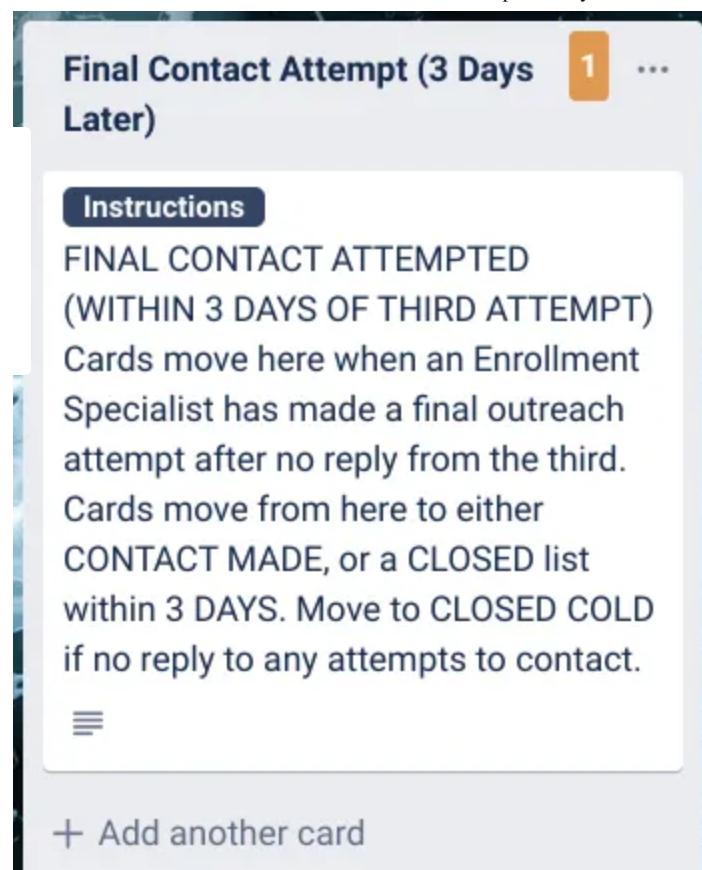
9. Follow-up call scheduled

As you can see, we follow up quite a bit. In sales, it takes at least 5 follow up efforts on average to successfully close a deal.

After the ninth column, we give up on leads. They're either unqualified or they went cold, which is a problem for another dashboard.

Right now, we're *using this dashboard to focus on our sales efforts and maximize the efficiency of our processes.*

At the top of every column, we've put instructions on what should be done in that phase.



This way, we're streamlining follow-ups and sales processes. Whoever logs into that dashboard knows exactly what they need to do. There's no second-guessing or wondering.

You log in and you do the work.

A lot of our follow-ups here are automatic.

When a card gets put into “first contact attempted,” **the sales dashboard automatically adds a one-day due date.**

Then, the salesperson assigned to it will see that ping, and they’ll follow up.

Now, this in itself is quite efficient. However, I have a Zapier zap for each stage.

The trickiest zap of them all (and the most important one) is the new lead zap.

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...., ... ~~you can~~ dashboard is having an automated sales pipeline and by God, we'll have it!

The next part of the dashboard includes using Zapier.

I'm a huge fan of it. It just took a while to create a workaround for zaps that had non-triggers (i.e. leads didn't respond and action was queued).

Sales Pipeline

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<input type="checkbox"/>		Cold Lead Process	<input checked="" type="button"/> ON	
<input type="checkbox"/>	► 2 ►	Enrich Lead Data	<input checked="" type="button"/> ON	
<input type="checkbox"/>	► 4 ►	Final Contact 3 Day Follow Up	<input checked="" type="button"/> ON	
<input type="checkbox"/>	►	First Contact One Day Follow Up	<input checked="" type="button"/> ON	
<input type="checkbox"/>	►	Lost Lead Follow Up 3 Months	<input checked="" type="button"/> ON	
<input type="checkbox"/>	► 5 ►	Lost Lead Process	<input checked="" type="button"/> ON	
<input type="checkbox"/>	►	INSTANT New Customer Notification	<input checked="" type="button"/> ON	
<input type="checkbox"/>	► 14 ►	New Lead Process	<input checked="" type="button"/> ON	
<input type="checkbox"/>	► 4 ►	Qualified Lead Process	<input checked="" type="button"/> ON	
<input type="checkbox"/>	►	Sales Dashboard Daily Date	<input checked="" type="button"/> ON	
<input type="checkbox"/>	►	Second Contact Attempt 1 Day Delay	<input checked="" type="button"/> ON	
<input type="checkbox"/>	► 3 ►	Stale New Lead	<input checked="" type="button"/> ON	
<input type="checkbox"/>	►	Third Contact Attempted 3 Day Delay	<input checked="" type="button"/> ON	
<input type="checkbox"/>	► 5 ►	Unqualified Lead Process	<input checked="" type="button"/> ON	



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I to set up a way for new leads to come into your Trello here, Zapier can handle the rest.

In our case, our leads come to the “New lead” column from either:

- Intercom
- Land bot application
- Calendly session booking

You've got to **cover all your lead entry points** and ensure that they're all added to your Trello dashboard to create an automated sales pipeline.

Once a new card (representing a new lead) is added to Trello, the next step is **sending a Voxer message** to our sales Voxer group.

Then, the message actually goes ahead and tells our salespeople that they have a new lead, with all the relevant information.

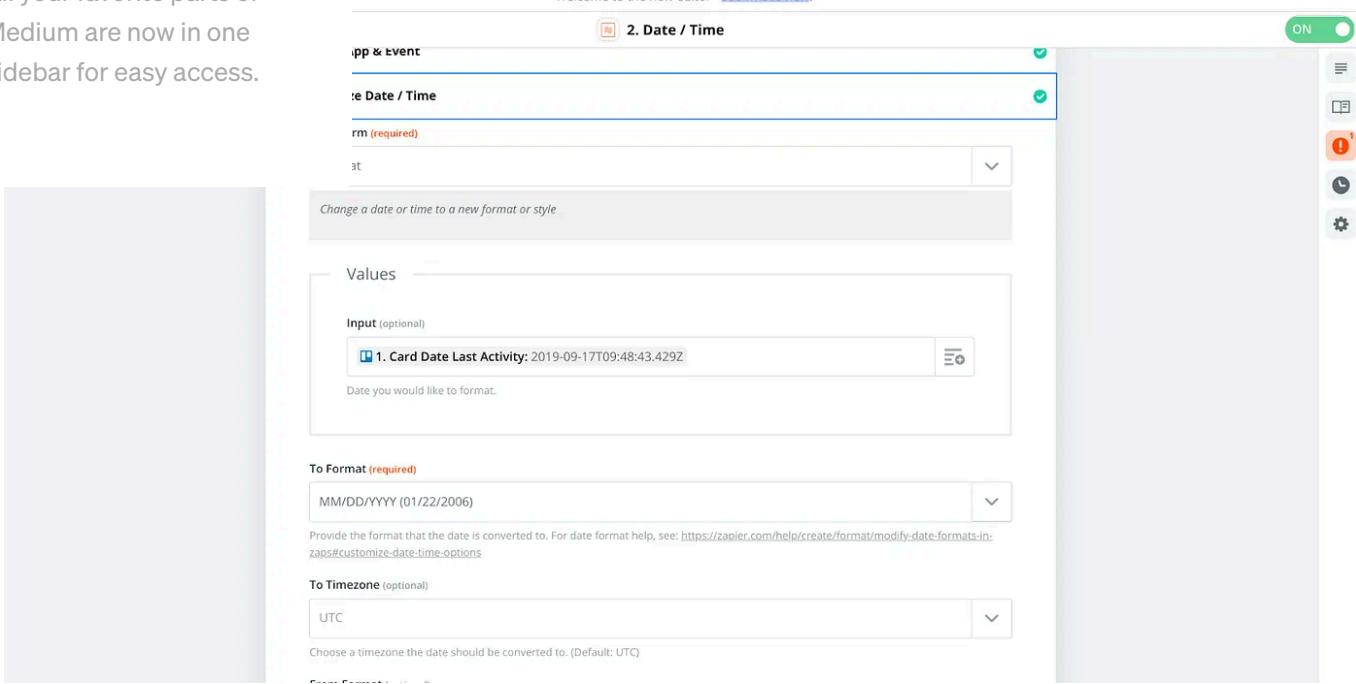
This is our system's specificity. We have a system where the first salesperson that gets the lead goes after it throughout the funnel, so it's very expandable.

However, if you have a different system, you can absolutely mix & match.

For example, if you have specific sales reps for different points of contact (columns), you can schedule automated messages to be sent to the right channels/reps.

Make sure your Trello, spreadsheet, and Zapier dates match.

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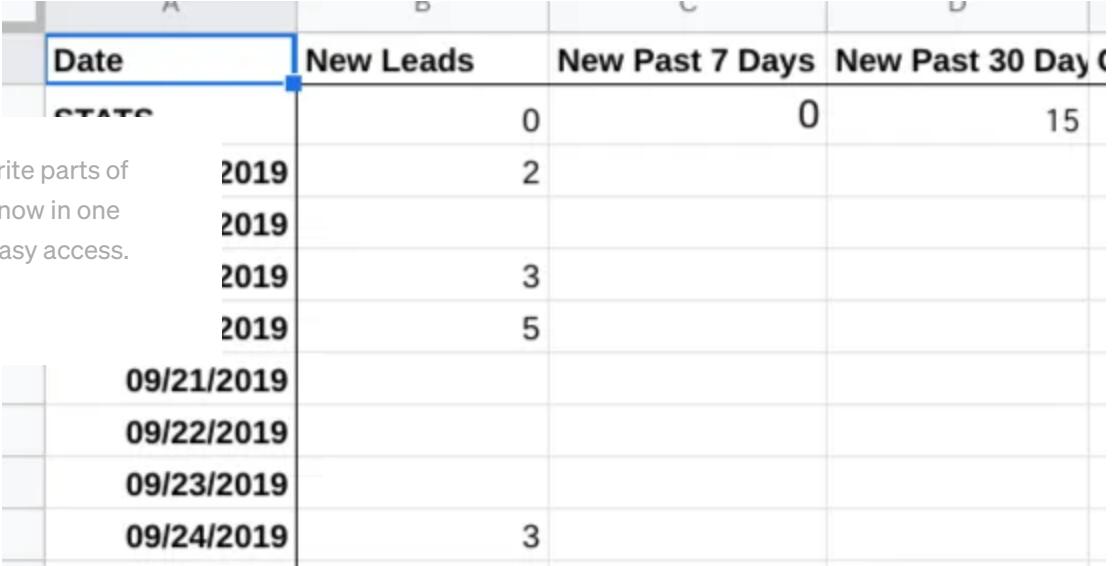


You may need to format dates like I did. When a Trello card is created, it includes a full date, time and time zone shtick. However, you can't use that in a spreadsheet, so you have to simplify the date.

The details really matter when you want to create an automated sales pipeline.

Organize your rows.

Since Zapier is going to be pulling data from your spreadsheet, you have to make sure that not only dates match, but that you don't have any duplicate rows.



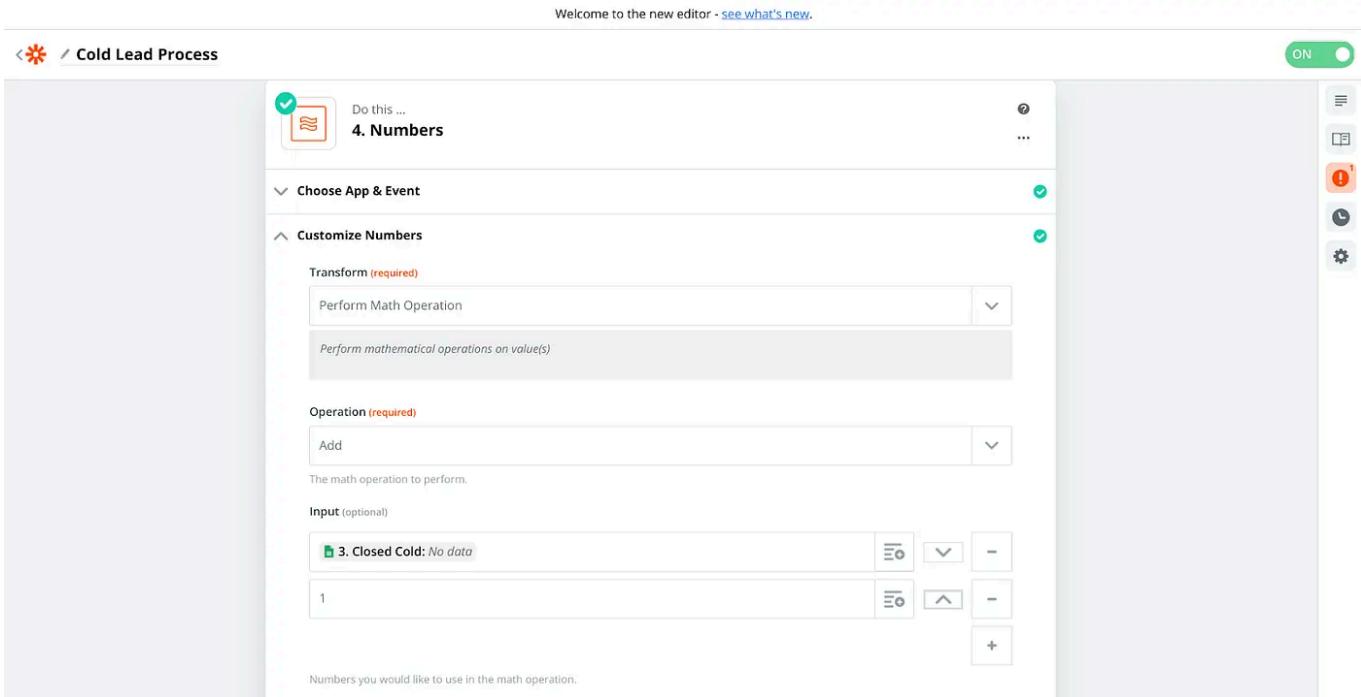
The screenshot shows a Google Sheets spreadsheet with the following data:

Date	New Leads	New Past 7 Days	New Past 30 Days
2019	0	0	15
2019	2		
2019	3		
2019	5		
09/21/2019			
09/22/2019			
09/23/2019			
09/24/2019	3		

Specify which *row* Zapier should be using to pull data, and ensure that it matches the Trello cards and columns.

Zapier is going to be looking up everything that's in the spreadsheet row you specified, so take the number that is in the spot there.

Then, add a number function to your spreadsheet.



The screenshot shows the Zapier editor interface with the following configuration for a 'Numbers' step:

- Action:** Do this ... → 4. Numbers
- Choose App & Event:** (dropdown menu)
- Customize Numbers:**
 - Transform (required):** Perform Math Operation
 - Operation (required):** Add
 - Input (optional):** 3. Closed Cold: No data (with input fields for 1, -, ^, /, +)

When you get a new lead, the spreadsheet row Zapier is using has to be updated.

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Zapier look up different rows.

We chose to focus on our **stats row** to help us understand how our process is performing, and how many leads we're getting on a daily, weekly, and monthly basis.

You can pull data for the past 7 days and the past 30 days.

	A	B	C	D
1	Date	New Leads	New Past 7 Days	New Past 30 Day Co
2	STATS	0	0	15
3	01/17/2019			

I personally think it's best to understand your 7-day lead totals and your 30-day lead totals.

Since those are moving targets (and the spreadsheet will treat them as sums), you'll always get the freshest data, provided that the spreadsheet is updated in real-time.

It's a lot more useful to be able to reference a Trello card in a meeting, instead of manually pulling data from a huge spreadsheet.

The best way to organize your sales pipeline is to add a status update card with stats to every Trello column.

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st accurate data on the current number of leads in that er alert you to any problems with your sales pipeline or further optimize.

The screenshot shows a Trello card titled "New Lead Stats" in the "Lead" list. The card has the following details:

- LABELS:** Stats
- Description:** Last 7 Days: 5
Last 30 Days: 15
- Custom Fields:** E-MAIL ADDRESS (Add e-mail address...) and PHONE NUMBER (Add phone number...)
- Activity:**
 - Ari Meisel added this card to New Lead Sep 13 at 6:07 AM
- SUGGESTED:** Join, Feedback
- ADD TO CARD:** Members, Labels, Checklist, Due Date, Attachment, Cover
- POWER-UPS:** Custom Fields, Get More Power-Ups

Again, automation is all about efficiency.

If you notice that, after a while, the leads really get stuck in the “third contact attempted” column, you can devise a way to improve it.

However, if you don't see the data, there's no way of understanding what's wrong or improving it.

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sales pipeline, you'll know exactly what's happening at

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What Does It Look Like from the Client's POV?

Obviously, we don't want our clients to see the gears behind the process.

We just want to make sure our automated sales pipeline is efficient and smooth.

In my case, whenever a new card with a new lead is added to the board, a client gets an email from my Gmail address:

“Hey, thanks so much for your interest. One of our enrollment specialists will be in touch ASAP. In the meantime, if you want to book a call, you can...”

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hone number with their contact info, we'll make sure it is formatted properly and send them a text message with the same email we sent.



1. New Card in Trello

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Add Members to Card in Trello



...and User in Intercom



5. Send Message in Voxer



6. Date / Time



7. Lookup Spreadsheet Row in Google Sheets



8. Numbers



9. Update Spreadsheet Row in Google Sheets



10. Lookup Spreadsheet Row in Google Sheets



11. Update Card in Trello



12. Send Email in Gmail



13. Only continue if...



14. Numbers



15. Update Card in Trello



16. Send Text Message in Tokyo

So as you can tell, there are quite a lot of apps in our process.

But all it takes is 12 zaps.

12 zaps, and you'll have created an efficient automated sales pipeline.

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