

Creating Efficiency in Your Business to Boost Growth

The Udesign Boost is a powerful platform that must work for your business and its growth. To leverage this it must be used, as in... “feed it data.”

Encourage users to pivot completely to it, moving away from other tools that include non-business distractions. Udesign Boost focuses on the business at hand and moves client relationships through their stages.

Remember that tweaking Boost to work its best magic for you takes at least the 90 day sprint in which we configure base features and then begin truly honing it to your use – no business is the same.

Each time you find yourself struggling with workload, frustration due to users or staff not matching your Standard Operating System (SoP) or sense there could be a better experience to offer your client, see if you can describe it in steps. Once you have those steps and evaluate the information following, it can be better optimised or even entirely automated.

Understanding How Udesign Boost Works as a System

At its core, **Udesign Boost** is not just a CRM.

It's a **business operating system**.

Think of it like this:

- Contacts are people
- Tags are labels
- Pipelines are journeys
- Stages are steps
- Opportunities are active deals
- Automations are the engine that moves everything

To help you master Udesign Boost, think of the system like a high-speed train network. Your **Contacts** are the passengers, **Tags** are their tickets, **Pipelines** are the tracks, and **Automations** are the digital conductors making sure everyone gets where they need to go without manual effort.

Let's break it down simply.

1 CONTACTS — The People in Your World

Everything begins with a **Contact**.

A contact can be:

- A new lead
- A customer
- A past client
- A supplier
- A partner

They live in your **Contacts database**.

Nothing else works without this foundation.

2 TAGS — Smart Labels That Organize People

Tags are simple but powerful.

Think of **Tags** as sticky notes you attach to contacts and are like simple text labels (e.g., New Lead, Booked Call, Hot Prospect.)

Examples:

- New Lead
- Facebook Ad Lead
- Booked Call
- Hot Prospect
- Paid Client
- Needs Follow-up
- VIP

Why Tags Matter

Tags allow you to:

- Segment your database
- Trigger automations
- Filter reports
- Personalize messaging

◆ A tag does NOT move someone through your pipeline.

◆ A tag classifies someone.

It answers:

“Who is this person and what category do they belong to?”

3 PIPELINES — Your Sales or Client Journey

A **Pipeline** is the visual representation of a specific business process (e.g., "Sales Funnel" or "Onboarding"). **Stages** are the individual steps within that pipeline.

It shows the journey someone takes from:

Stranger → Lead → Prospect → Client

Each business can have multiple pipelines:

- Sales Pipeline
- Onboarding Pipeline
- Support Pipeline
- Recruitment Pipeline

Pipelines are where deals live.

4 STAGES — The Steps Inside a Pipeline

Each pipeline contains **Stages**.

Example Sales Pipeline:

1. New Lead
2. Contacted
3. Appointment Booked
4. Proposal Sent
5. Negotiation
6. Won
7. Lost

Stages represent:

“Where is this opportunity right now?”

They help answer:

- What needs attention?
- What’s stuck?
- What’s closing?

5 OPPORTUNITIES — Active Deals

While a "Contact" is a person, an **Opportunity** is a specific deal or potential sale associated with that person.

Important distinction:

- A Contact = the person
- An Opportunity = the deal

One contact can have:

- Multiple opportunities
- Or one active opportunity

Opportunities track:

- Value
- Status
- Stage
- Owner
- Forecast

They allow revenue forecasting and performance tracking.

Status: Opportunities are marked as **Open**, **Won**, **Lost**, or **Abandoned**.

6 AUTOMATIONS — The Engine Behind Everything

Automations (Workflows) are "If/Then" recipes. They connect everything else.

- **Example:** If a tag is added, **Then** create an Opportunity in the "New Lead" stage.

Now the powerful part.

Automations make the system intelligent.

Automations can:

- Add tags
- Remove tags
- Create opportunities
- Move opportunities between stages
- Send emails or SMS
- Assign tasks
- Notify staff
- Trigger webhooks
- Update custom fields

This is where the magic happens.

How Everything Works Together (Example Flow)

Let's walk through a real-world example.

Step 1 — Lead Opts In

Someone fills out your form.

Automation triggers:

- Create Contact
 - Add Tag: "Facebook Lead"
 - Create Opportunity in Sales Pipeline
 - Place in Stage: "New Lead"
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Step 2 — Auto Follow-Up Begins

Automation sends:

- SMS instantly
- Email 1
- Email 2
- Reminder message

Step 3 — They Book a Call

Booking automation:

- Move Opportunity to “Appointment Booked”
- Add Tag: “Booked Call”
- Notify Sales Rep

Step 4 — They Close

Sales rep marks Opportunity as “Won”.

Automation triggers:

- Remove prospect tags
- Add Tag: “Client”
- Move to Onboarding Pipeline
- Start onboarding workflow

System Summary (Simple Mental Model)

Component What It Does

Contacts The people

Tags Labels that describe them

Pipelines The journey

Stages The step in the journey

Opportunities The active deal

Automations The engine moving everything

Why This Matters to Your Business

Think of it like this:

Tags = Identity

Pipeline = Journey

Stages = Location

Opportunity = Revenue Potential

Automation = Movement

When all five work together, you don’t just have a CRM.

You have a **predictable growth revenue system**.

Without this structure, businesses rely on memory. **With** this structure, businesses rely on systems.

✅ Best Practices

- **Keep Pipelines Simple:** Don't create 20 stages. If a human doesn't need to take action at a stage, it might just be an automation step instead.
- **Use Descriptive Tags:** Use tags like SOURCE: Facebook or STATUS: Hot so you can filter your contact list in seconds.
- **Automate Stage Moves:** You can set GHL to move an Opportunity to "Proposal Sent" automatically as soon as you send a document. This keeps your dashboard accurate without you touching it.

⚠ Common Mistakes

1. Too many pipeline stages (creates confusion)
2. Using tags when they should use stages
3. Creating automations without strategy
4. Not assigning opportunity owners
5. Not cleaning up lost opportunities

Clarity beats complexity.

📺 Recommended Best Practice Structure

For most businesses:

Sales Pipeline

- New Lead
- Contacted
- Appointment Booked
- Proposal Sent
- Won/Lost

Keep it simple. Note, the above is just an example and its best to evaluate the stages you know and want your customers to go through, and it must make sense to the data you want to see. You can always expand later.

Summary of Relationships

1. **Tags** trigger **Automations**.
2. **Automations** create/move **Opportunities**.
3. **Opportunities** live inside **Stages**.
4. **Stages** make up your **Pipeline**.

Pro Tip: Always look at your **Opportunities Dashboard** first thing in the morning. It gives you a "bird's-eye view" of exactly how much potential revenue is sitting in each stage of your business.