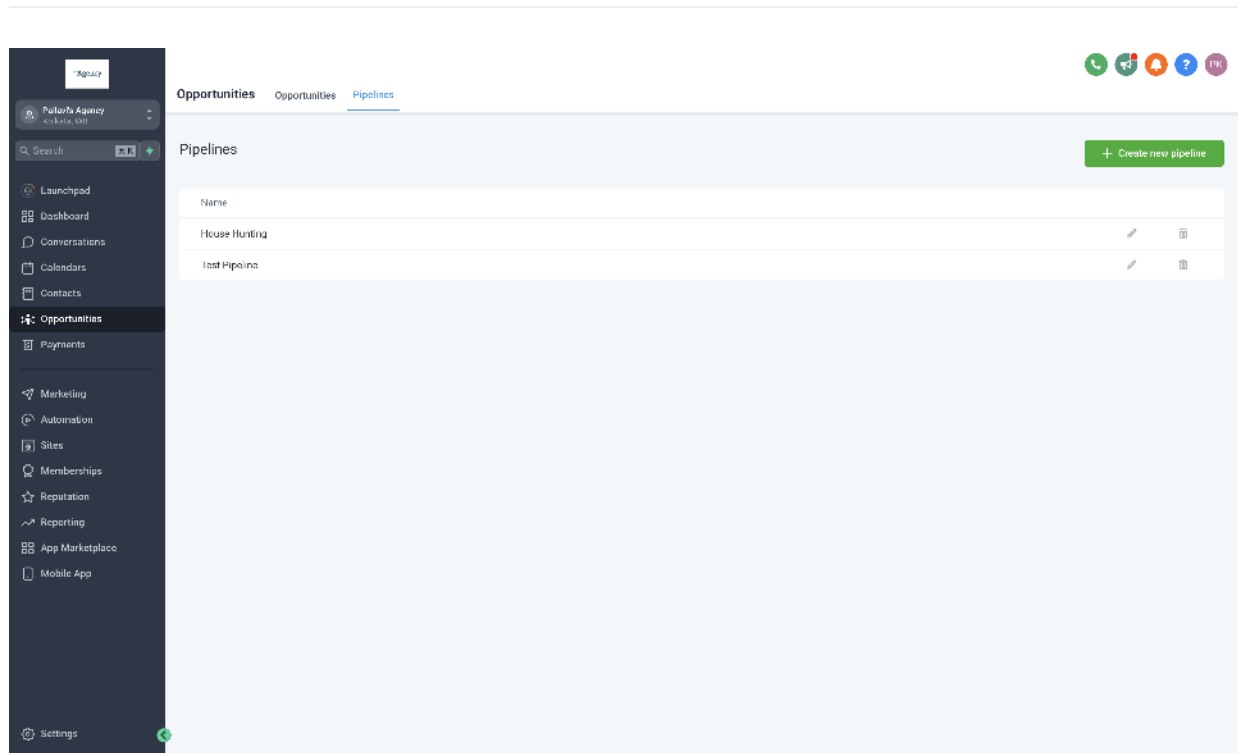


# CITK

## Understanding Pipelines



# Understanding Pipelines



Pipelines are an essential feature in GoHighLevel that streamline and automate various processes within your business workflows. They enable you to create structured sequences of actions that guide leads or customers through predefined steps, ensuring efficient communication and consistent engagement.

Pipelines can be accessed through: Sub account > Opportunities > Pipelines

# Pipeline Stages

Edit pipeline

Pipeline Name

House Hunting

Stage Name

Actions

House Seen

Contact Received

Visit Scheduled

Shortlisted

Finalized

+ Add stage

Visible in Funnel chart

Visible in Pie chart

Cancel

Save

Pipelines are composed of stages, each representing a specific step in the customer journey or sales process.

Common stages include "Lead Capture," "Qualification," "Appointment Setting," "Follow-up," and "Closing."

## Best Practices

## Keep it Simple:

- Avoid creating overly complex pipelines that may confuse users or lead to inefficiencies.
- Focus on essential stages and actions that align with your business objectives.

## Regular Maintenance:

- Periodically review and update your pipelines to reflect changes in your business processes or customer preferences.
- Remove outdated actions or stages to streamline workflows and improve performance.

## Data-driven Decisions:

- Leverage analytics and reporting features in GoHighLevel to gain insights into pipeline effectiveness.
- Use data to identify bottlenecks, optimize conversion rates, and enhance customer experiences.