

CITK

Understanding Opportunities

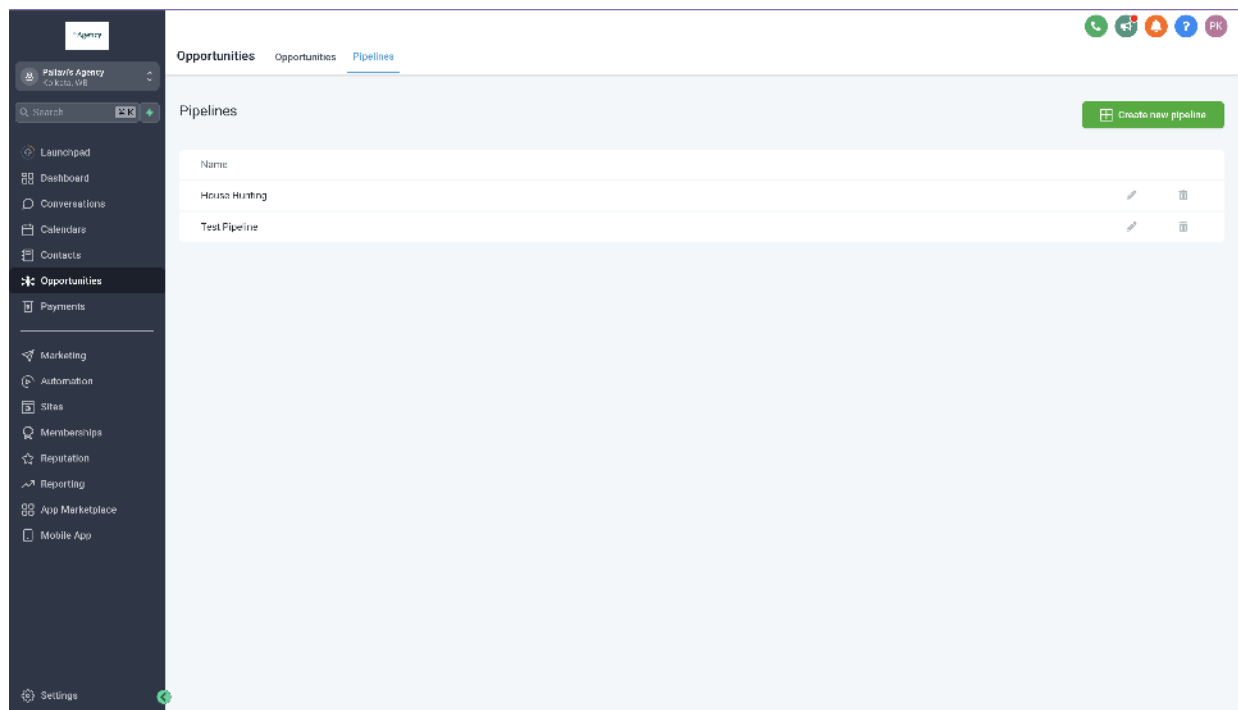


Opportunities in HighLevel represent potential sales or deals at various stages of the sales pipeline.

They encapsulate leads or prospects showing interest in products/services, ripe for conversion into paying customers.

Key Concepts:

Pipeline Integration



- Opportunities are managed within pipelines which in turn are series of consecutive stages.
- Customizable pipelines align with unique sales processes and business goals.

Learn more about pipelines [here](#)

Stage Progression

- Opportunities advance through pipeline stages, signifying their position in the sales cycle.
- Stages typically include "Prospecting," "Qualification," "Proposal," and "Negotiation"

Learn more about creating pipelines [here](#)

Opportunity Status

- "Open", "Won", "Lost" and "Abandoned" are opportunity status which are present by default.
- An opportunity can be in one of the four statuses and we can use these to prepare filters for the same.

Learn more about Opportunity Statuses [here](#)

Understanding Opportunity Statuses:

1. Open:

- Opportunities with the "Open" status are actively being pursued and are still in progress.
- These opportunities represent potential deals that have not yet been won, lost, or abandoned and are still viable for conversion.

2. Won:

- The "Won" status indicates that the opportunity has been successfully converted into a sale or deal.
- This status is applied when the lead has made a purchase or signed a contract, resulting in revenue generation for the business.

3. Lost:

- Opportunities with the "Lost" status represent deals that have been unsuccessfully concluded.
- This status is applied when the lead decides not to move forward with the purchase or chooses a competitor's offering.

4. Abandoned:

- The "Abandoned" status indicates that the opportunity has been neglected or disregarded, either by the lead or by the sales team.
- This status is applied when there is no further action or follow-up planned for the opportunity, and it is effectively removed from active consideration.

Data Management

Understanding Opportunities in HighLevel

Add new opportunity

Create new opportunity by filling in details and selecting a contact

Opportunity Details

Contact details

Contact Name *

Select Contact

Email

Enter Email

Phone

Phone

Opportunity details

Opportunity Name *

Enter opportunity name

Pipeline

Test Pipeline

Stage

Added

Status

Open

Opportunity Value

₹ 0

Owner

Unassigned

Followers

Add Followers

Business Name

Enter Business Name

Opportunity Source

Enter Source

New

You can now have different owner for contact and opportunity.

[Go to labs](#)

Add/Manage Fields

Cancel

Create

- Robust data management within opportunities tracks opportunity source, contact details, opportunity value, and notes.
- Users can also streamline communication and task assignment under Opportunity - linked contacts, enhancing workflow efficiency and timely engagement.