

CTTK

Understanding Opportunities



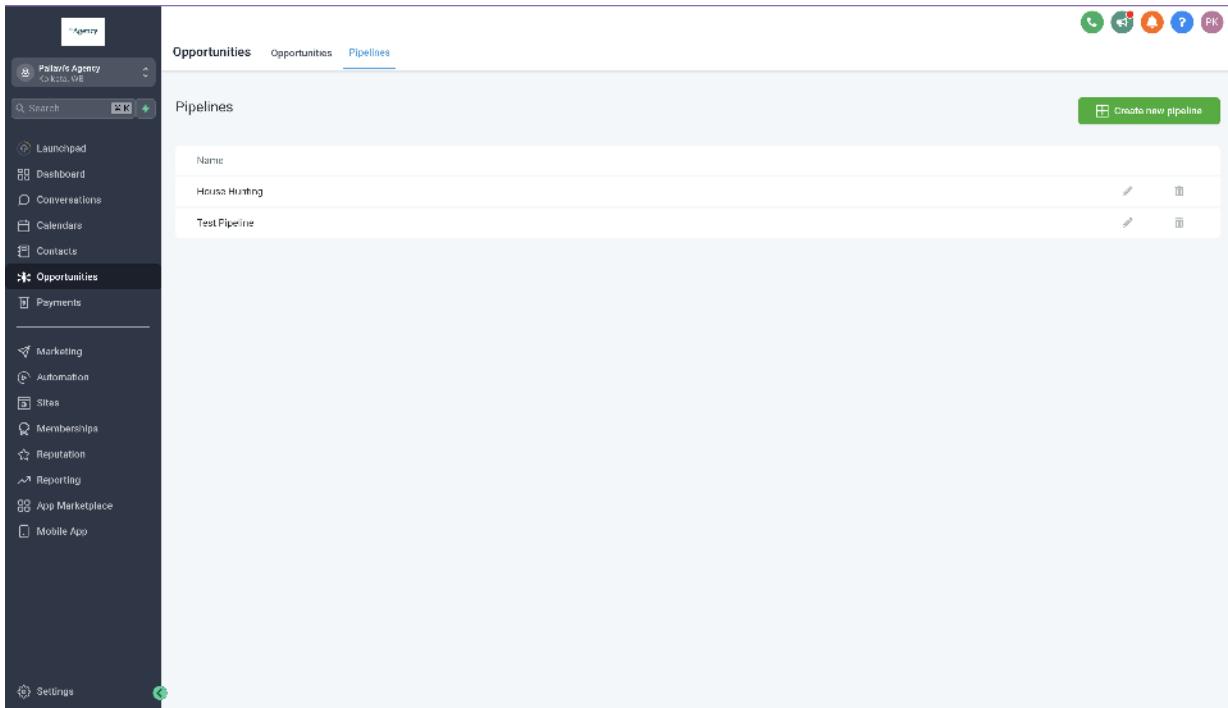
Understanding Opportunities in HighLevel

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

A screenshot of the HighLevel software interface. The left sidebar shows a navigation menu with 'Opportunities' selected. The main content area is titled 'Pipelines' and shows a list of pipelines with two entries: 'House Hunting' and 'Test Pipeline'. A green button at the top right says 'Create new pipeline'. The top navigation bar has tabs for 'Opportunities' (selected), 'Opportunities', and 'Pipelines'. The top right corner has several small icons for communication and help.

- 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

Understanding Opportunities in HighLevel

- 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 * Email
Select Contact Enter Email

Phone
Phone

Opportunity details

Opportunity Name *
Enter opportunity name

Pipeline Stage
Test Pipeline Added

Status Opportunity Value
Open ₹ 0

Owner Followers
Unassigned Add Followers

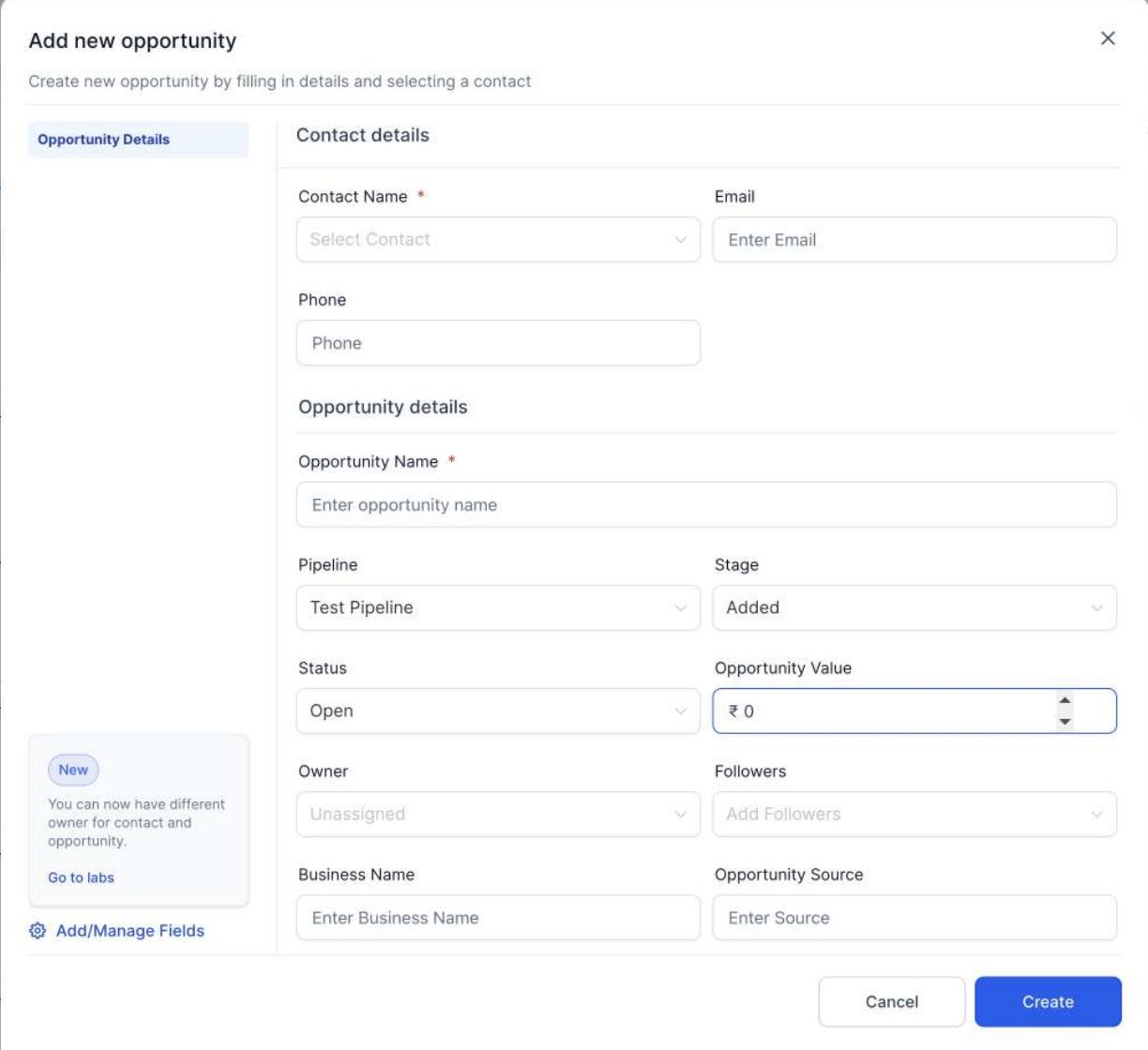
Business Name Opportunity Source
Enter Business Name Enter Source

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.