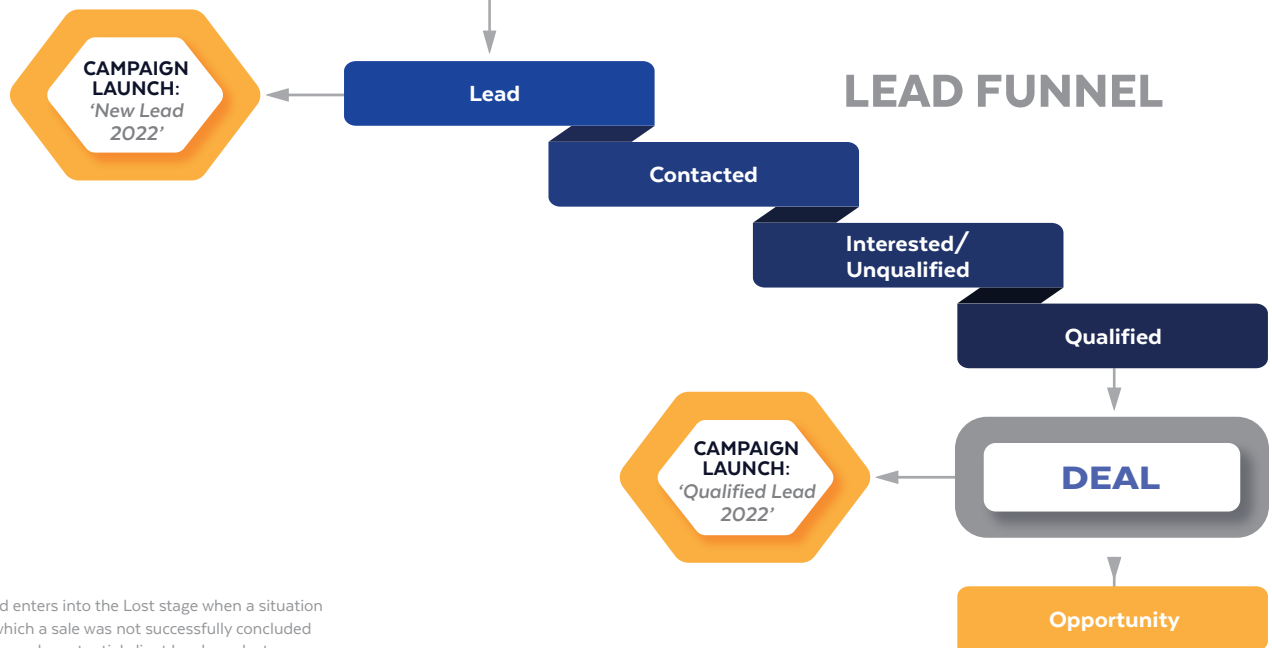
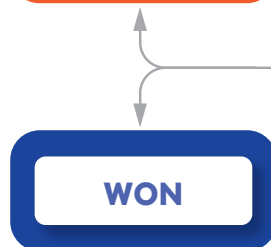




A lead enters into the Lost stage when a situation in which a sale was not successfully concluded and a potential client has been lost.



Put simply, the won stage is where a sale has been formally completed and a deal has been agreed. This can be a conversion of a lead into a paying customer or the signing of a deal, the Lead has become your Client.



A lead is transitioned into the Under Review > stage while proposal or quote is under review or if any changes are needed. At this point an additional pitch may be needed to the final decision maker or possible negotiations. This stage is for proposals under review with More than a 50% probable close rate.



A lead is transitioned into the Under Review < stage while proposal or quote is under review or if any changes are needed. At this point an additional pitch may be needed to the final decision maker or possible negotiations. This stage is for proposals under review with less than a 50% probable close rate.



A lead is transitioned into the Needs Proposal stage when a formal quote or proposal has been created and sent to the prospect. During this stage a plan or suggestion, especially a formal or written one is put forward for consideration or discussion by others.

When a contact is moved to the Sales Cycle, the first stage it enters is a sales opportunity, which is a qualified sales lead. This means an opportunity is present which ultimately represents a potential deal.