Contact Us Webform

New Lead Created

Initial Status = **Not Contacted**

Task Creation Workflow Rule will trigger on Lead Create.

Workflow Rule will send notifications to the appropriate group(s)

Representative will reach out to Lead

Did they Respond?

Yes

Are they Interested?

Yes

Interested/Closed-Won

- Interested Services
- Notes

Contact Type Updated

Deal Record(s) Auto-Created Via **Workflow Rule**

Added to Email Newsletter

No

Not Interested/Closed Lost

- Reason for Disinterest
- Notes

Status **Updated** to **Closed-Lost**

Not sure yet

No

Requires Follow-up

- Follow-up Date
- Email Automation
- Message
- Notes

Task will be created to follow-up with Lead on the specified Follow-up Date

Status **Updated** to **Follow-up Required**

Junk Lead

Status **Updated** to **Junk Lead**

New Deal Record

Initial Status = **Qualification Workflow Rule** notifies associated group members

Meet with Client. Figure out what their needs are and obtain info that will help determine price quote.

Still Interested/Good Fit?

No

Closed-Lost

- Closed Lost Reason
- Notes

Yes

Generating Proposal

Create Proposal and send the completed document to client.

Proposal Sent

Proposal Accepted?

No

More Negotiation Needed

Negotiate Terms of the Proposal

Revised Proposal Accepted?

No

Yes

Accepted

Yes

Verbal Acceptance - Documents Sent

Wait for Signature

Contract Signed/Closed-Won

Stage **Updated** to **Closed-Won**

Legend

RED = More Info
BLUE = Blueprint Transition
PINK = Update
GREEN = Function
PURPLE = Task
ORANGE = Email

Data Flow
Process
Common Transition

Decision
Document or Webform
Mandatory Fields
Planning Questions
Automation
Manual Process
Task lists
Process Info
Database
Action Map
Notes to self