Admin toolkit

Get to grips on the basics with this straightforward guide

pipedrive

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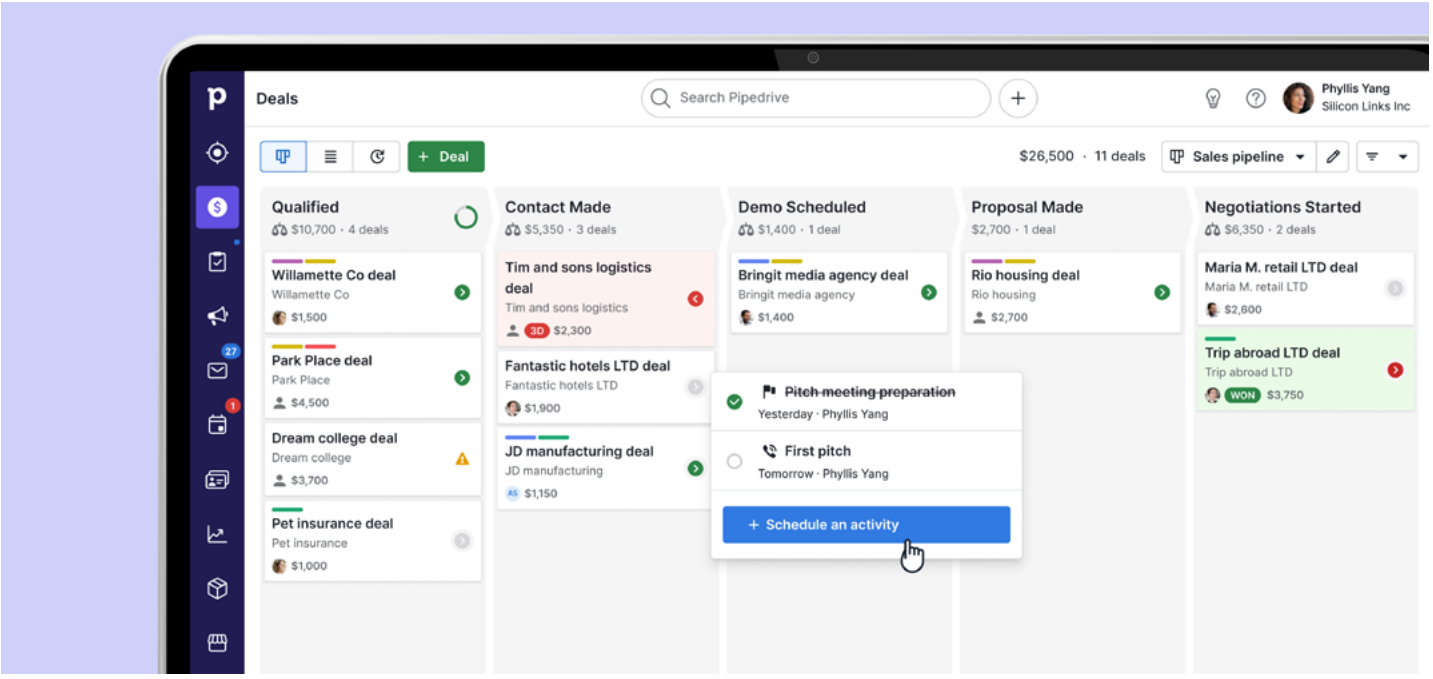
Understanding Pipedrive principles

Welcome to Pipedrive! As you start using our CRM, there are a three basic terms you'll want to become familiar with.

Contacts are the individuals or organizations you engage with, **leads** are potential **opportunities** to qualify and **deals** represent actual sales opportunities pursued through the sales pipeline. Each plays a crucial role in managing and tracking interactions with prospects and customers through the sales process.



Contacts

Contacts are individuals or organizations you have a relationship (or potential relationship) with. They can be existing customers, prospects, partners or any other entities. Contacts in Pipedrive typically include information like name, email address, phone number, company name and any other relevant details.

Leads

Leads are potential opportunities associated with contacts that have shown interest in your products or services but haven't yet progressed through the pipeline. They're often at the early stage of the sales process, where you're still qualifying their interest and determining whether they're a good fit for your products or services. In Pipedrive, leads can be created from various sources such as website inquiries, networking events or marketing campaigns.

Deals

Deals represent potential sales or revenue-generating activities with specific contacts or organizations. When a lead progresses further in the sales process and becomes "qualified", it's typically converted into a deal. Deals contain details like deal value, expected close date, deal stage (e.g., prospecting, negotiation, closed-won, closed-lost) and any associated activities or notes.

For more on Pipedrive terminology, please visit our glossary.

360 Pipedrive view

These are the main features a team will use daily to manage tasks, follow the process flow and measure success. It's also via these that a team's process flow will be built.

Highlighted features:

Pipeline management

A sales pipeline provides valuable insights into how effective your sales process is and where your deals are at a given time. This article offers tips and guidance on how to build your pipeline.

• Visualize your sales process with customizable pipeline stages

• Move deals through stages with a simple drag-and-drop interface

• Create multiple pipelines for different products or markets if needed.

Lead & deal management

Although leads and deals are closely related, it's important to understand how each can best serve your sales process.

• Capture and organize leads efficiently

• Track the progress of each deal with detailed records

• Use custom fields to tailor deal details to your specific process

Activities

Activities are actions you schedule to close a deal: phone calls, lunch meetings, emails, etc.

• Schedule and track activities such as calls, meetings and follow-ups

• Set reminders to ensure no tasks fall through the cracks

• Sync activities with your calendar for better time management

Sales reporting and analytics

Keeping track of your progress is crucial to sales success. Pipedrive's Insights feature lets you create custom reports, dashboards and goals.

• Generate reports to analyze key metrics like deal conversion rates and sales performance

• Use dashboards to get real-time insights into your sales pipeline

• Track individual and team performance to identify areas for improvement

Contact management

Organizing, storing and tracking information on customers and leads improves communication and relationship management.

• Store and organize contact information for leads and customers

• Track communication history to maintain context in interactions

• Segment contacts to target specific groups with tailored messages

How is your sales process organized?

A well-organized sales process provides consistency, improves efficiency, helps identify bottlenecks and enables better tracking of performance, increasing the likelihood of closing deals and building strong customer relationships.

Things to consider...

Think about these things when defining your flow in Pipedrive and building your pipeline and process structure:

- What are the key stages in your sales process?
- What activities and tasks are involved at each stage?
- Who is responsible for each stage of the sales process?
- How do you track the progress and outcomes of your sales activities?

Highlighted features:

Leads Inbox

Pipedrive's Leads Inbox is a separate inbox for pre-qualified leads before they become deals.

Pipelines

Pipelines outline the key stages, or steps, of your sales process.

Articles:

- How can I customize my pipeline stages?
- Pipeline view

Tips for a healthy pipeline:

- Shouldn't be more than 5 or 6 stages
- Shouldn't contain a held/won/lost leads stage
- Shouldn't have a long name
- Pipeline should only contain qualified opportunities (qualification defined by user) – leads not allowed!

How do you manage your sales pipeline?

A well-managed sales pipeline offers numerous benefits, both for individual sales representatives and for organizations as a whole. Read below for some key advantages.

Things to consider:

Consider these points to successfully manage your pipeline on a day-to-day basis:

- How is your sales journey structured?
- When do you convert someone from a lead to a deal?
- How do you filter and organize your pipeline?
- How do you segment and prioritize your deals?
- When do you consider a deal stale or stagnant?

Highlighted features:

Labels

Apply color-coded labels to leads, deals and contacts to help you organize your data and speed up your sales process.

Filters

Use filters to see specific data in your account – you can mix different item fields within a filter to use the connections and custom fields you've created.

Deal rotting

Pipedrive's deal rotting feature visually notifies you of any deals that have remained untouched for longer than the defined rotting period.

Tips:

- Ensure you don't have rotting deals
- Make sure every deal has a scheduled follow-up activity
- Ensure there's an expected close date or deal value for proper forecasting

How do you engage with your contacts?

Engaging well with customers is crucial – it builds trust, helps you meet their needs and creates a positive experience that drives loyalty and conversions.

Things to consider:

- Which channels do you use to contact your customers?
- How do you log your meetings in Pipedrive?
- How do you build long-term relationships with customers?
- How do you personalize your emails with customers?

Highlighted features:

Email

Manage email conversations with your customers with Email sync and Smart Email BCC. Both allow you to match emails to contacts, leads and deals.

Other email features

- Email templates and automations
- Group emails
- Email tracking and Insights for email performance
- AI email creation

Webinar

- How Email Sync works in Pipedrive

Live Chat

Part of our Leadbooster add-on, Live Chat is a real-time messaging tool that helps your business engage with website visitors, capture leads and sync conversations.

- Real-time customer engagement and support
- Enhances the customer experience with personalized interactions
- Capture leads directly from your website

Calls

Integrate Pipedrive with your VOIP platform so you can keep all engagement in one place (you can check integration options in the Pipedrive Marketplace)

- Log these calls automatically in the system
- Make and log calls directly from your mobile device with Pipedrive's iOS and Android mobile apps

Contact timelines

Pipedrive's contacts timeline is a visual representation of the activities linked to your contacts over time – a great tool for understanding when and how often you're interacting with your customers.

- Activities linked to your contacts over time
- Chronological interactions log
- Activity scheduling and follow-ups

Meeting scheduler

Pipedrive's meeting scheduler tool is a great way to keep in touch with clients when it's convenient for you both, and you can use it alongside the email sync feature.

- Eliminate back-and-forth communication by allowing clients to book meetings from your shared calendar link
- Easy calendar integration and customizable availability times to ensure your schedule remains organized and manageable

Tips for contact management:

- Make sure all contacts include an email address
- Ensure contacts are linked to their corresponding organization

Which tasks do you perform every day?

Any scheduled action towards closing a deal should be marked in your account as an activity. Maybe that's a phone call, lunch meeting or email – whatever it is, you can schedule it for a contact, organization, lead, deal or project so you always know what's coming next.

Articles: Activities, Custom activities, Activity reports

Things to consider:

- Which tasks are associated with each stage in your sales journey? Do you host demos, send samples or welcome guests on-site? How do you log your meetings in Pipedrive?
- Which repetitive tasks do you perform in your sales pipeline that you'd like to automate? (Example: calling a customer three days after sending a proposal.)
- How do you track your sales team's productivity? Do you have KPIs that you would like to track?
- Do you have tasks or activities you'd like to track that are tailored to your sales process?
- How would you like to be reminded about upcoming tasks and activities?

Highlighted features:

Calendar sync

Calendar sync automatically syncs your preferred calendar system (Google, Outlook, etc.) to your Pipedrive account, keeping activities up to date across platforms.

Automations

Automations simplifies and automates repetitive tasks to enhance workflow efficiency and save time, enabling you to create activities automatically by setting specific conditions.

AI Sales Assistant

Pipedrive's Sales Assistant is an intelligent AI-powered system that sends you notifications, insights and advice to help streamline your sales process and win more deals.

Tips for effective daily use:

- Create custom activity types, e.g. "no show" and "meetings/demos"
- Add priority labels to your activities
- Promptly mark activities as done

Who will use Pipedrive?

Pipedrive is ideal for sales teams, managers and other staff focused on driving revenue and managing customer relationships. Different roles often require tailored access to features and data. Address privacy concerns: customize permissions and ensure sensitive information is shared or restricted appropriately across the team.

Things to consider:

- Who will be using the Pipedrive account?
- What roles do these users have in your organization?
- Will all users need the same level of access to data and features?
- Are there any specific data privacy concerns or requirements for your team?
- How should information be shared or restricted within your team?

Highlighted features:

Teams

Pipedrive's Teams* feature allows admin users to keep an eye on team progress, allowing them to check progress directly.

***Teams is only available on our Professional and higher plans. Professional plan offers three teams and Power plan up to fifteen. Enterprise plan offers unlimited teams.**

• Easily organize users into teams based on departments or projects

• Assign tasks and monitor performance at team level

• Simplify collaboration and streamline workflows by grouping relevant users together

Permission sets

When managing a team, you may want to limit certain tasks for certain users. Permission sets* let you control which users can perform specific tasks.

***Only available to users with account settings access.**

• Define what each user can see and do within Pipedrive

• Customize permission sets for different roles (e.g., sales reps, managers)

• Ensure sensitive information is only accessible to authorized users

Visibility groups

To allow you to categorize users and dictate which items and information they will be allowed access to see, Pipedrive offers visibility groups.

***Only available to users with account settings access.**

• Control the visibility of deals, contacts and other data

• Set up visibility groups to restrict access based on user roles or teams

• Protect confidential information while promoting efficient collaboration within your organization

Tips for visibility settings:

- Ensure everyone has access to contacts to avoid duplicates
- This indicates user can only see their item

What data should you store in Pipedrive and what's the best way to organize it?

Organizing your data effectively in Pipedrive is key to aligning your sales processes with your business goals. By identifying the most critical data for sales and customer management, tailoring it to the roles of your team and setting up clear tracking methods, you can streamline workflows and drive measurable success.

Things to consider:

- What are your primary business goals and sales processes?
- What types of data are most important for your sales and customer management?
- Who will be using Pipedrive and what are their roles?
- How will you track and measure your sales performance?

Highlighted features:

Data import

Pipedrive's data import simplifies transferring data from sources like spreadsheets or other CRMs into your account. It offers intuitive field mapping, bulk imports and real-time validation.

Articles:

- Importing data with spreadsheets
- How to import from a different CRM

Custom data fields

Within Pipedrive, you can add fields specific to your company's needs as custom fields. This way, you can document specific information needed to customize your data and organize and filter it based on these fields.

- Identify essential data points to track
- Add custom fields to capture these data points for deals, contacts and organizations

Tips for visibility settings:

- To avoid data duplicates, review the "merge duplicate" feature
- You can use the pipedrive filter tool for segmentation using your custom fields or other data fields item

Reporting:
how to measure success and improve processes?

Measuring success in a CRM ensures your sales efforts align with goals. Tracking metrics and improving processes optimize workflows, enhance customer experiences and drive growth, keeping your team competitive.

Things to consider:

- What's your monthly sales revenue?
- How many opportunities have been added to your Pipeline lately and where did they come from?
- How many sales does your team expect to close in the coming months?
- What's the win-to-loss ratio for your sales opportunities and which customer segments convert best?
- How do your conversion rates compare across different stages of the sales funnel?
- What's your sales cycle length?
- Who are the most productive sales reps in the team?
- How many sales meetings do you have booked for the following weeks?

You'll need to leverage Insights' capabilities to accurately answer such questions.

Reporting resources to measure success and help you improve

Academy Insights course

Topics covered:

- Insights
- Goals
- Deal forecast view
- Revenue forecast report
-
- Leads reporting

Articles

Find articles on Insights reporting (everything about the feature), Insights reports (type of report) and Insights dashboards here.

Featured articles:

- Insights
- Insights reports: lead conversion
- Comparative insights
- Insights: dashboards

More resources

On demand Webinars

We've already mentioned that we host live webinars you can sign up for. However, there are also several on-demand webinars available on our Knowledge Base to watch now! Find them via the above link at the bottom of the page under "Events On Demand".

Video tutorials

For videos to guide you on how to set up your Pipedrive account, follow this link.

You'll find expert advice on the following topics:

- Pipedrive basics
- Deals and sales pipelines
- Organizing data
- Pipedrive settings

Academy courses

Here you'll find courses to complete to enable you to get the very most out of our tool.