A Journey Through the Sales Process in Accelo

Let's find out what it will be like for you to bring a prospect through the sales process and transition them into the project management phase using Accelo.

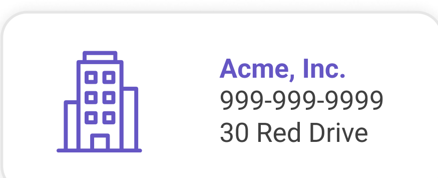
SCENARIO

Your professional services business has just qualified a new lead. Jane Doe, who runs Acme, Inc., fits your ideal client profile.

Here's how your team can use Accelo to simplify the sales process and get Jane over the line!

1

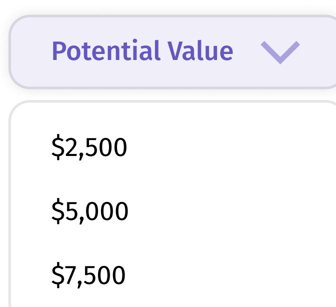
Create a company and enter Jane's contact details



2

Create a new sales opportunity and enter:

- The probability of closing
- The potential sale value
- The type of sale, e.g., New Business or Repeat Business

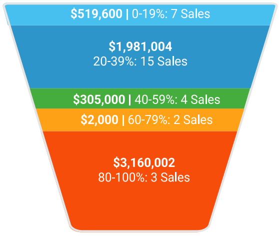


3

Send emails to Jane directly from Accelo's interface to ensure tracking

4

Track and examine your current funnel on the sales dashboard



5

See all opportunities at a glance and filter by type using the custom list

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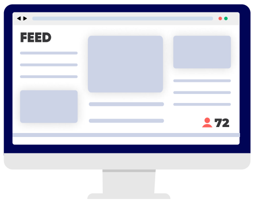
Schedule a pricing call with Jane by creating a booking in Accelo

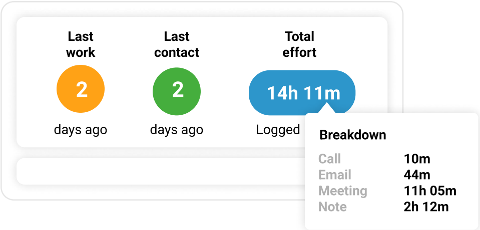
7

View the Activity Stream to review the history of correspondence between Jane and anyone in your organization



8

Review the time ("total effort") your team has tracked against the opportunity



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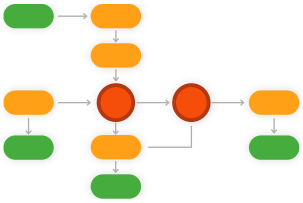
Create a project estimate, which generates a tentative project plan

10

Change the opportunity's status to trigger automated task assignments for your team



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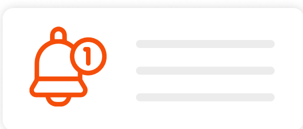
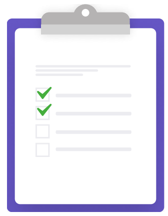
Automatically notify your team member who reviews estimates that a new one has been created



12

Preview a quote, edit it to display only what you want, then publish and send to Jane

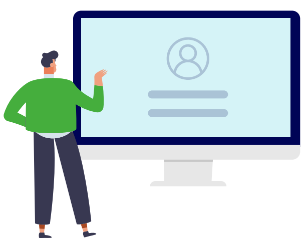


13

Find out if Jane has viewed your quote

14

Enable Jane to easily accept your quote through Accelo's client portal



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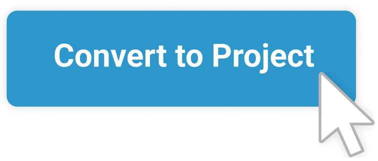
Convert the quote to a project



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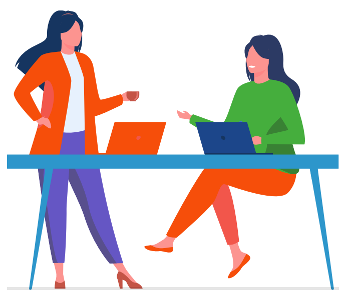
Start working on your first project for Acme!



WHAT MAKES ACCELO'S SALES PRODUCT UNIQUE?

- It's not just a CRM! Connecting Sales to Projects and Billing gives you the **flexibility** to move seamlessly into the active client work phase.
- The Stream gives you **complete visibility** into every lead's progression, and custom triggers remind your team to reach out so no opportunities get lost in the pipeline.
- Accelo **tracks your team's total effort** for every opportunity — including emails, meetings, calls and notes — so you can easily see when it's time to reassign leads or hire a new sales rep.