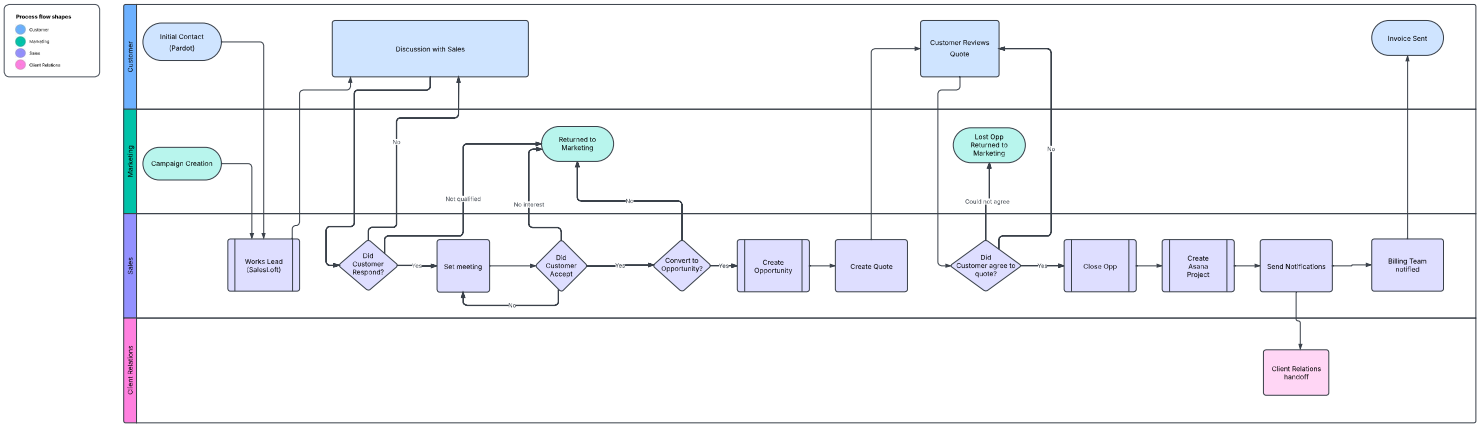
Process flow shapes
Customer
Marketing
Sales
Client Relations
Customer
Marketing
Sales
Client Relations
Initial Contact (Pardot)
Discussion with Sales
Customer Reviews Quote
Invoice Sent
Campaign Creation
Returned to Marketing
Lost Opp Returned to Marketing
Works Lead (SalesLoft)
Did Customer Respond?
Set meeting
Did Customer Accept
Convert to Opportunity?
Create Opportunity
Create Quote
Did Customer agree to quote?
Close Opp
Create Asana Project
Send Notifications
Billing Team notified
Client Relations handoff
No
Not qualified
No interest
No
Could not agree
No
Yes
Yes
No
Yes
Yes