

Pipedrive Tips and Tricks

with
Pipedrive
Expert
Paul Minors

One of the most popular CRMs around today, [Pipedrive](#) is known for its ease of use and focus on sales. It can be a huge asset to any sales team, something that I know all about.

Not only do I use Pipedrive in my own business for tracking prospects, but I've also [helped 250+ companies get more out of Pipedrive](#).

Below are my favorite Pipedrive tips and tricks for getting the most out of the platform.



Paul Minors

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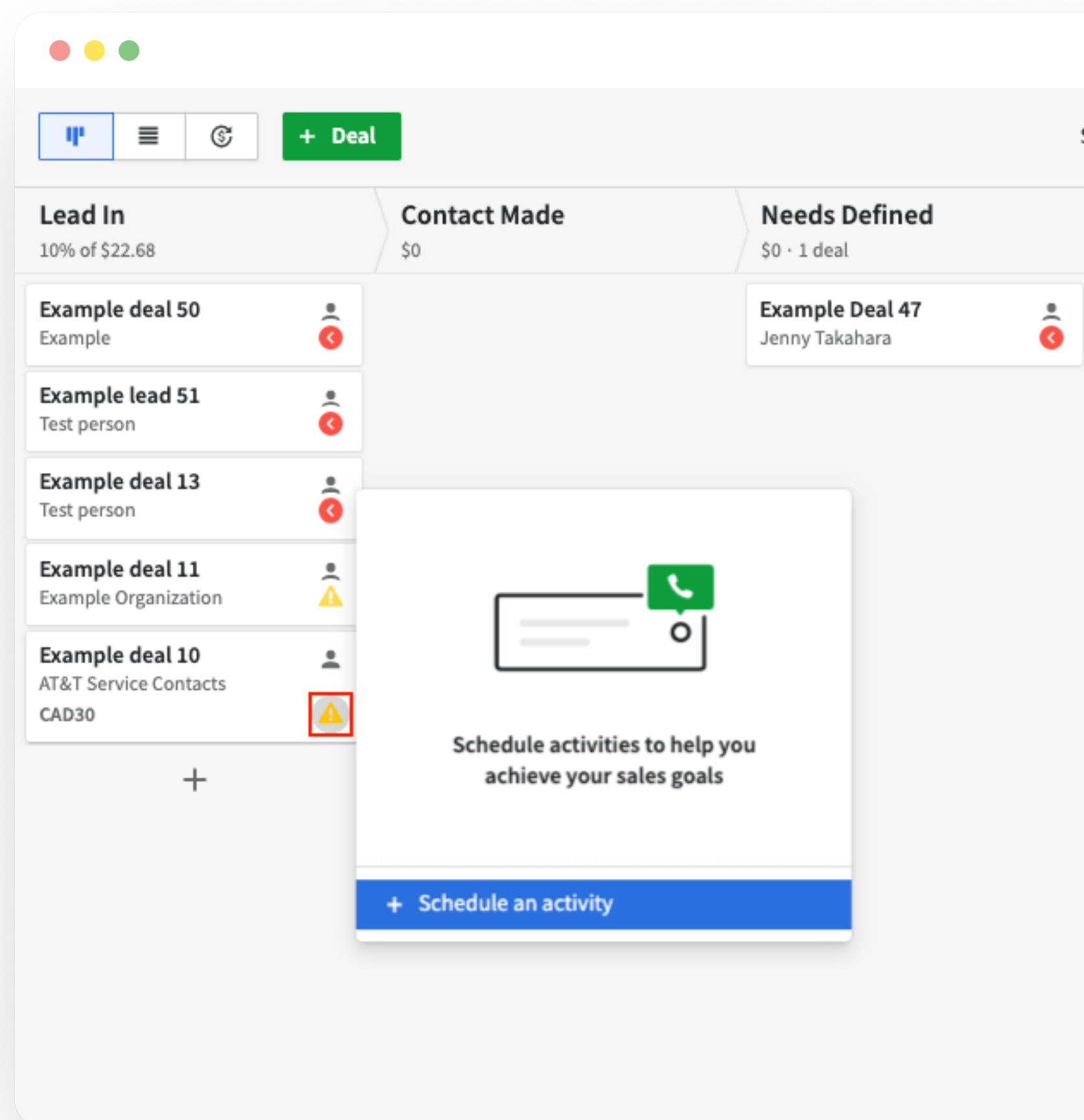
Pipedrive tip #1:

Always have at least one activity reminding you what to do next

Pipedrive is a very activity-centric product, always encouraging you to schedule activities and reminding you what you need to do next. Sometimes you'll be waiting on your customers or clients (perhaps waiting for their response to a quote or proposal), but even then you should still have some kind of activity reminding you to follow up.

This simple best practice means that leads are far less likely to slip through the cracks because you always **have a reminder or an activity reminding you what you need to do next**.

I recommend working from the Activities tab daily. Using the Today view, you can see any emails, calls, contracts and other activities you need to work on. Then, as you complete each of these activities, you can also schedule the next action you'll need to take.



Pipedrive tip #2:

Use Workflow Automation to create activities based on the deal stage

Don't think you have enough time to create new activities all the time? Rather than having to manually schedule an activity, you can set up a [Pipedrive automation](#) to do the work for you. They have templates for a variety of scenarios, including creating an activity when a deal is moved to a new stage.

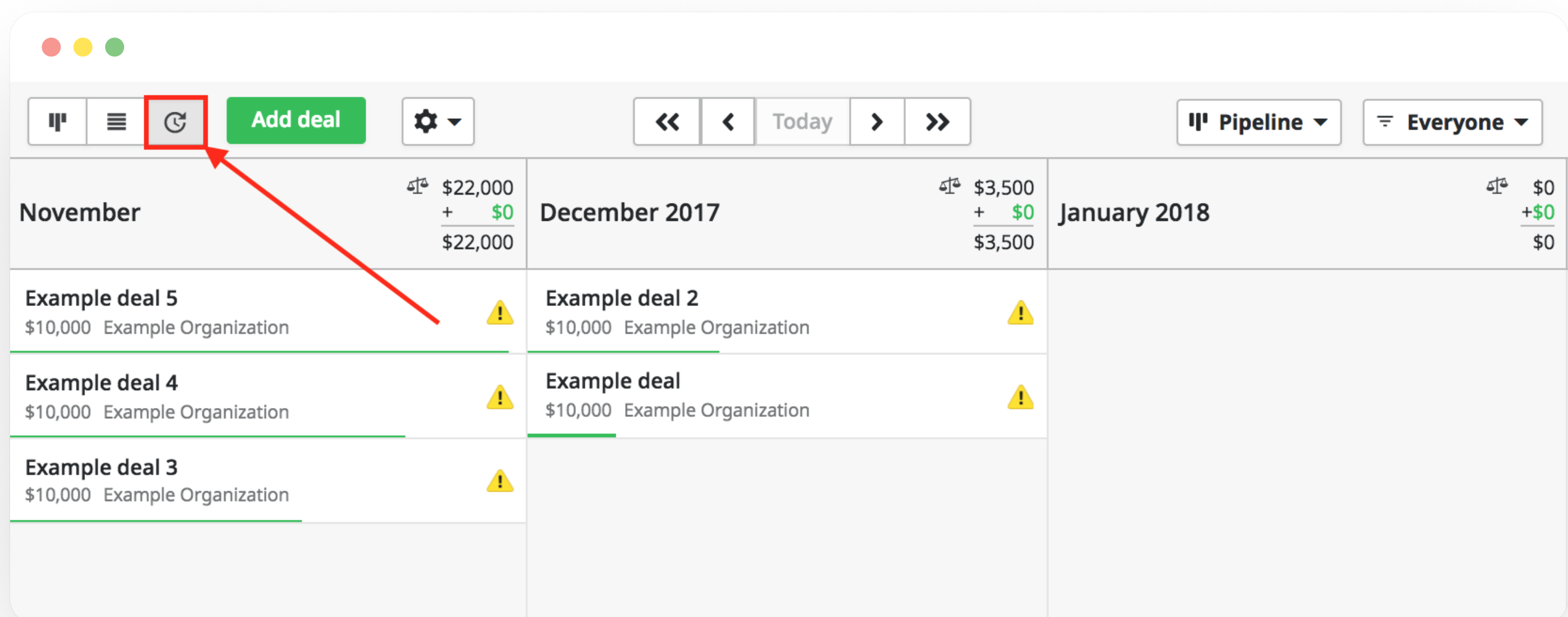
Here's one example of how it can work:

- Under Trigger configuration, set the automation to kick in whenever a deal moves to the Contract Sent stage
- Set the type of activity to Email
- Set the due date to two days
- Set the activity subject to "Follow up on contract"
- On the next page, set it so that the automation can be triggered by any user in your account
- Use a descriptive workflow title, such as "Stage: 'Contract Sent' → Create Activity"
- Finish off by testing the automation to ensure it works as planned

Pipedrive tip #3:

Use the 'expected close date' to forecast your upcoming sales

Switching from the main pipeline view to the Forecast view helps you understand what revenue or sales you're likely to receive each month based on when you expect to close a deal.



When you are fairly close to getting a decision on a deal — maybe you've had verbal confirmation that they're going to sign a contract — add the expected close date to the deal. It will then show up under your expected sales.

This helps you understand what sales or revenue you're likely to receive for any given month. In turn, that understanding helps you know which deals you should prioritize and follow up with.

Pipedrive tip #4:

Track deal source with a custom “Referred by” field

Using a custom field to track your referrals, whether they’re from specific people or particular channels, can give you valuable insights into your marketing.

When I talk to a lead for the first time, I generally start my sales conversation by asking how they found me. I then record that information in this custom field. **Then, when I win the deal, I can easily see what channels and referral partners are generating business and double down on them.**

Note that you need to be on the Pipedrive Professional plan to segment your reports based on a custom field. Considering that this additional data can make your marketing much more effective, the upgrade may be worth it!

Pipedrive tip #5:

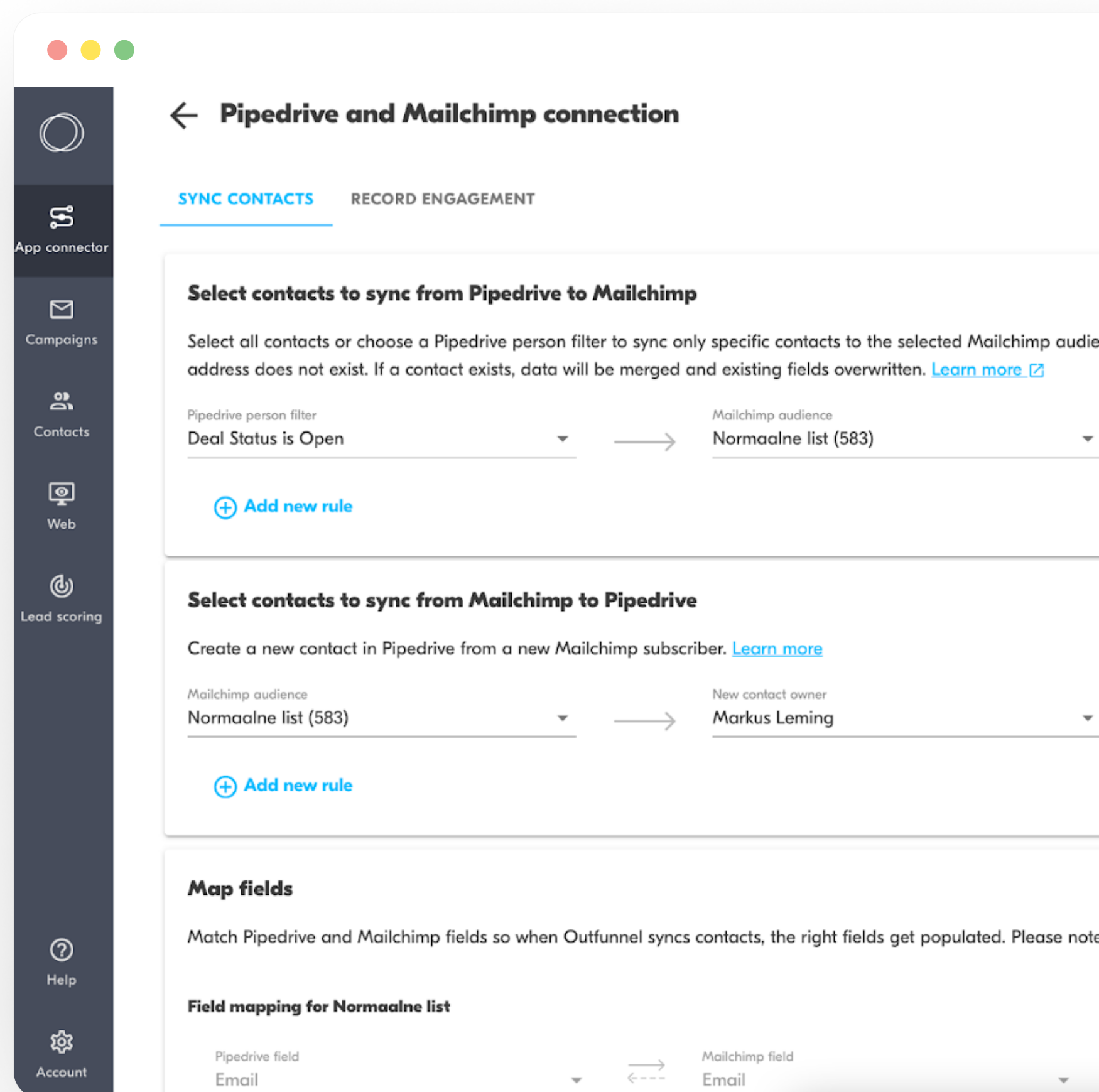
Use Outfunnel to sync your contacts to your email marketing CMS

This next tip is great if you want to [nurture leads](#) in your pipeline over the long term. With Outfunnel, you can synchronize your contacts from Pipedrive to your mailing list in one of the supported marketing automation service providers.

For example, using Outfunnel's App connector, you can set up a [connection between Pipedrive and Mailchimp, ActiveCampaign, Sendinblue or HubSpot Marketing](#).

As you can see, you can use filters to **choose which specific Pipedrive contacts you want to sync** and which Mailchimp list you want to use. This can also work the other way, synchronizing contacts from Mailchimp back to Pipedrive as well. So, for example, when somebody joins your Mailchimp audience, you can have a new contact or deal created for that particular user.

One of the cool things about Outfunnel is that it lets you record email engagement in Pipedrive. When an email you've sent is opened, if a link is clicked, if the [email bounces](#) because it's a bad address or if someone unsubscribes, you can track and see all of that engagement in Pipedrive in one place.



Outfunnel also gives you the option to create a deal if an email is clicked. Let's say you send an email to your newsletter list with a call to action (CTA) link at the end. That would be a great way of getting new deals into your Pipedrive pipeline for the more engaged, active subscribers that you have in your email CMS.

[Outfunnel's Lead scoring](#) is another useful feature. For example, a page view could be worth ten points, opening an email could be worth two points and an email click five points. When a subscriber takes one of these actions, Outfunnel tracks what they're doing and increases their Lead score in Pipedrive.

By filtering your contacts based on Lead score, you can target the leads who are most engaged with your content and emails.

Pipedrive tip #6:

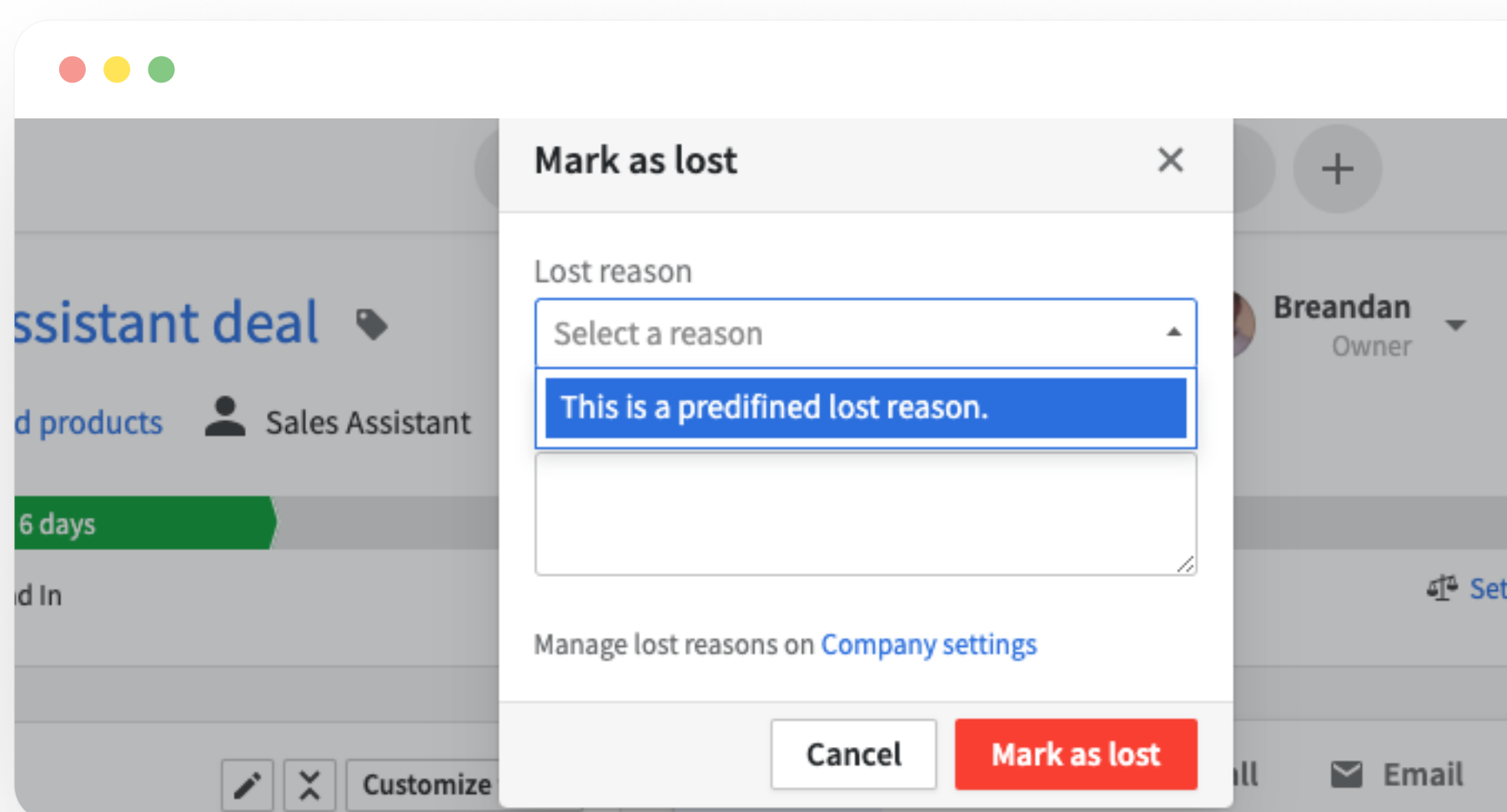
Customize your lost reasons

Unfortunately, not every deal is going to close successfully. However, tracking why those deals aren't closing will allow you to see any emerging patterns and respond accordingly.

By customizing your Lost reasons, every time you mark a deal as lost you'll be able to choose from a preset list of reasons. These can be edited in your company settings.

Here are some of the common ones that I often set up with clients:

- Client wouldn't respond
- Price too high
- Went with another option
- Went with a competitor
- Bad timing
- No specified reason

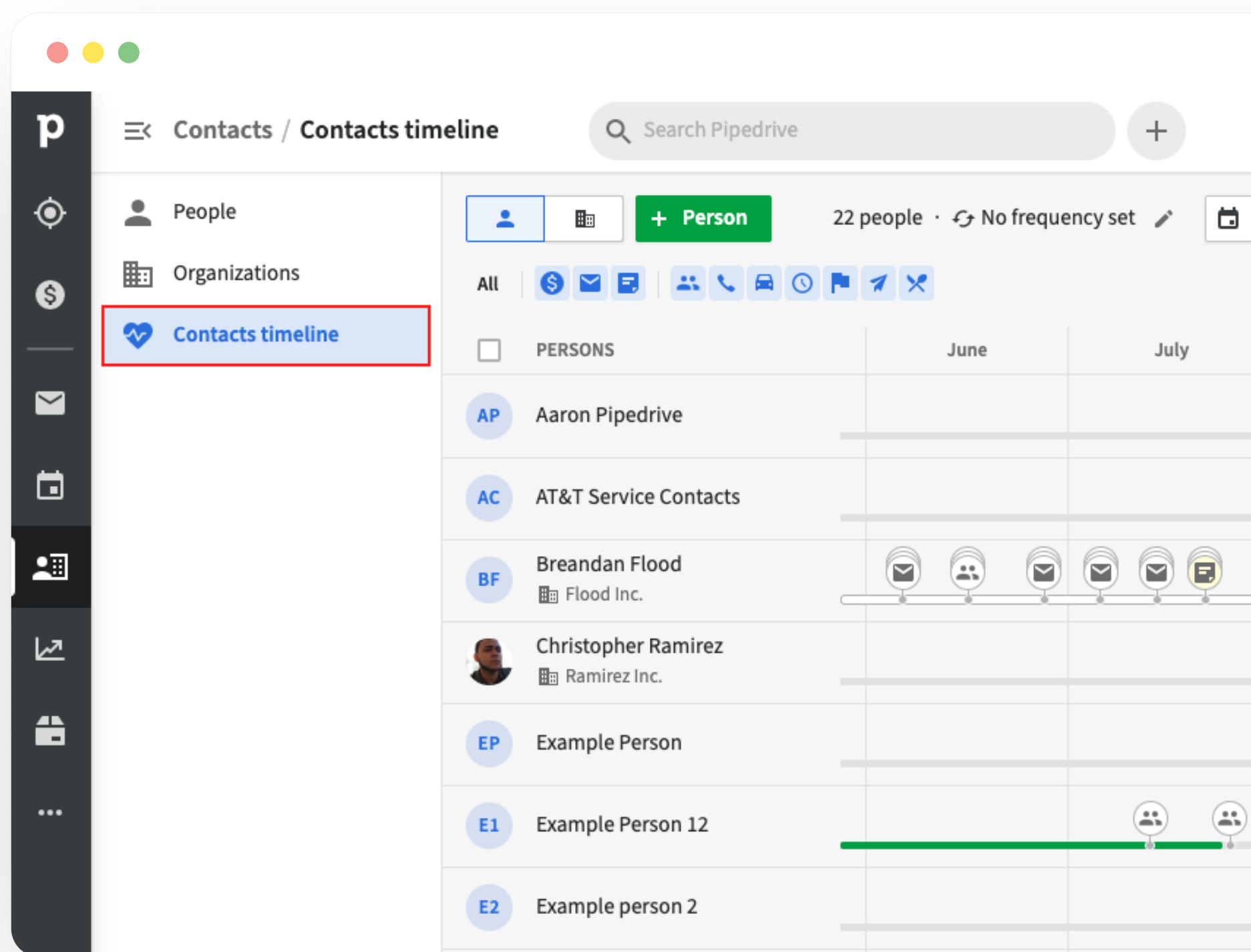


Once you've set up your list of reasons, I recommend **disabling** the option to allow free form entries. This means your sales team has a definitive list of reasons to choose from. You can then generate a report to show the number of **deals lost over a particular time frame and why**. This helps you understand any weaknesses in your sales process and where you can improve.

Pipedrive tip #7:

Use the Contact Timeline to nurture your important relationships

There are likely clients you've dealt with in the past that you want to keep in touch with regularly. From the Contacts section, you can apply a filter to the Contacts Timeline to show your high-value clients. For example, you could see all clients where you've successfully closed a deal worth more than \$2,000. You'll end up with a list of **high-value clients who should be looked after and nurtured.**



Within the Contacts Timeline, you can set a follow-up frequency. So, if you want to follow up with these clients twice a year, those who haven't been contacted in the last six months will show up in red, letting you know they're due a call.

Now you can work your way down this list, scheduling calls or emails as needed. This gives you a nice visual representation of when you last spoke to these clients, showing you at a glance when emails were sent, when phone calls were made and when you last had a meeting.

Pipedrive tip #8:

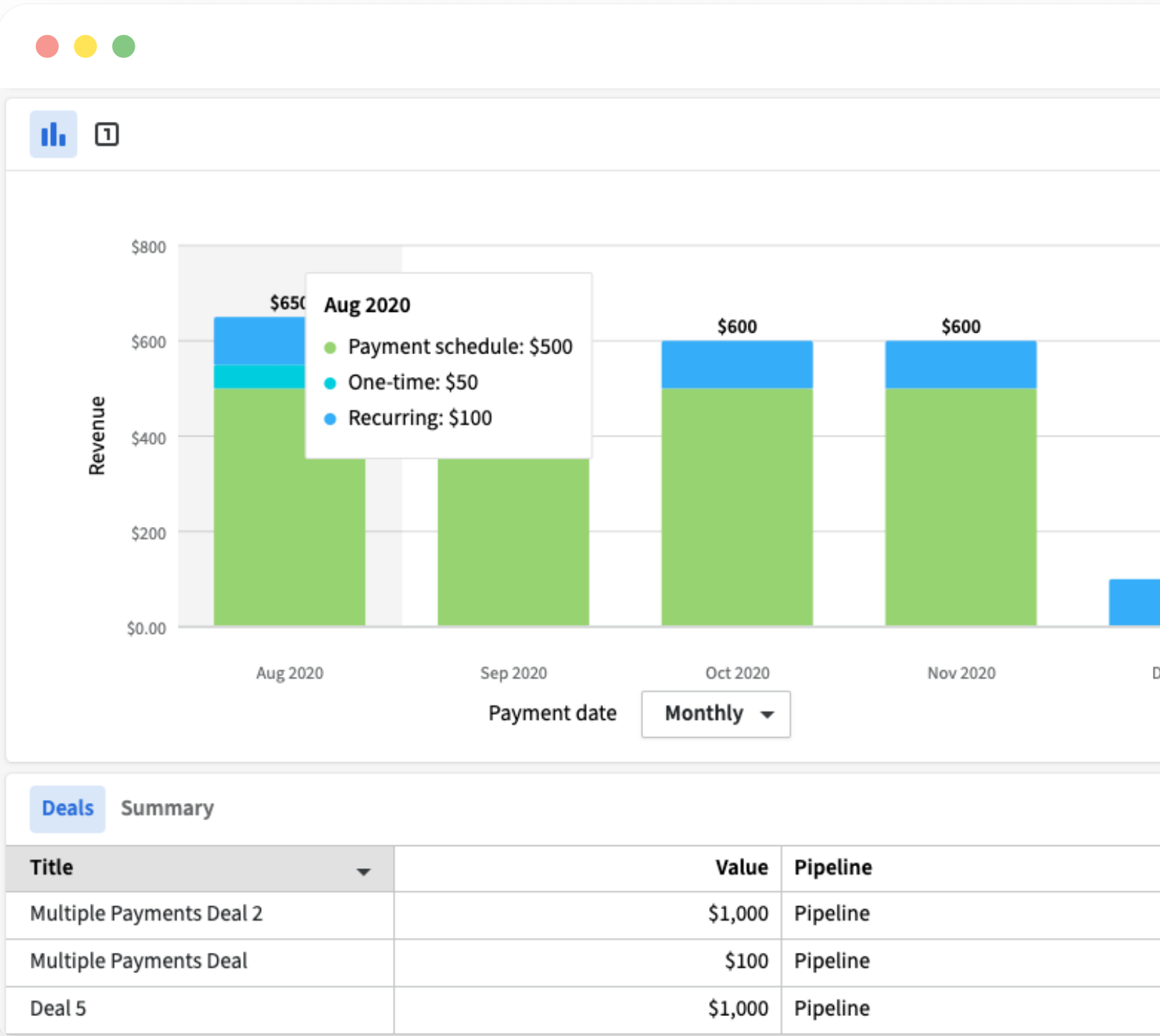
Use the revenue features in Pipedrive to forecast future revenue

If you have a business that receives recurring revenue, you can create a Subscription for the recurring amount. This can be used for both set-term contracts and rolling contracts. Just set your interval frequency and when it goes into effect. This makes it easier to see the **customer's long-term value** and the **recurring revenue** you'll receive.

Alternatively, for projects with a payment plan, you can set up a Payment Schedule. So, if you were receiving \$10,000 for a project and that's being collected in three payments, you could use the Payment Schedule to say how often those payments would be collected, the payment terms and any other relevant details.

This is useful from a cash flow forecasting point of view. So if you go to Insights, you can generate a report that shows what payments are due and how much you can expect to see from your recurring revenue and payment schedules.

This is particularly useful if your deals are reported on an accrual basis, where you win a project but you don't collect the full payment upfront.



Pipedrive tip #9:

Save intro and follow up emails to templates

If you're on the Advanced plan or higher, you can connect your email to Pipedrive, allowing you to send emails directly from the Pipedrive system. You can also set up some simple email templates, which makes following up with leads and potential clients much easier. For example, here's a 'New Inquiry' template that I like to use:

Hi {First Name},

Thank you for your recent inquiry via my website. I'd love to connect on a call so we can chat about your project goals.

[Here's a link](#) to book a slot with me.

Please let me know if you have any questions in the meantime.

As you can see, the template is personalized with the contact's first name and includes a link to book a call.

Once you're happy with the template, you can also share it with the other salespeople on your account. Not only does this help you save time, but it also helps your sales team stay consistent with your messaging and follow-ups.

About Paul Minors

Paul Minors is a virtual productivity consultant and was Pipedrive's Global Partner of the Year for 2021. If you want to learn more about Pipedrive or need one-on-one support setting up your account and training your team, [get in touch with Paul](#) today.



About Outfunnel

Outfunnel is a data integration platform that makes it incredibly easy to keep contacts and engagements in sync between sales tools like Pipedrive and marketing tools like Mailchimp, ActiveCampaign and web forms. For more information or to sign up for a free trial, visit www.outfunnel.com