WHAT DO THE DEAL STAGES IN PERQ CRM MEAN?

Understanding the Deal Stages in PERQ CRM will help you prioritize your work and improve your personalized follow up with your leads.

Deal Stage	Common Scenarios	What Should I Do?
Blue leads are higher in the purchase funnel and are not ready to talk yet.	Manually entered lead (default) Lead only completes 1 or less website experiences	Allow automated Email Nurture System to follow-up and convert leads to Yellow or Red.
Yellow leads are expressing buying signals, but they haven't asked a question or requested an appointment.	Lead self identifies where they are in the buying process as **researching**, **I don't know where to start**, **beginning** or **middle** Lead answers a ready to buy question with: **within 2 weeks**, **within a month**, or **within 90 days**	Allow automated email nurture to follow up and engage, while adding in human touches to move the lead to the next stage of the buying process through text messaging or email and phone call.
Red leads are low in the purchase funnel. These leads are ready to make a decision and fast follow up is key to revenue conversion!	Lead indicates they are ready to **buy now**, or they are at the **end of the buying process**	Use open-ended questions through text messaging, email or a phone call to re-engage the lead into a buying conversation. Quick follow-up is encouraged.
Flagged leads are lowest in the purchase funnel. These leads are ready to make a decision and fast follow up is key to revenue conversion!	Lead scheduled an appointment through a PERQ experience Lead completed the **Ask a Question** or **Request More Info** experience(s)	You should follow up with the lead and provide any information they've requested in under an hour, if possible.

Leads in PERQ CRM with Flags have scheduled an appointment through a PERQ experience, completed the Ask a Question or Request More Info experiences.

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