



PIPEDRIVE CRM IMPLEMENTATION

Making Every Sales Opportunity Actionable

Industry focus: IT Consulting & Managed Services

BUSINESS OVERVIEW

An IT consulting and managed services provider sells projects such as cloud migration, cybersecurity reviews, application support and ongoing service agreements. Sales cycles involve discovery calls, technical scoping, proposals, stakeholder reviews and recurring follow-ups. Pipedrive can provide a visual pipeline and activity-led process so representatives know what stage each opportunity has reached and what needs to happen next.

Project snapshot

Area	Solution focus
Industry	IT consulting, implementation projects and managed services
Platform	Pipedrive CRM with selected automation and reporting features, subject to plan
Core challenge	Sales opportunities and next steps tracked across spreadsheets, inboxes and personal reminders
Primary goal	Standardize the sales pipeline, improve follow-up discipline and make deal status visible
Delivery approach	Discovery, pipeline design, configuration, data preparation, integrations, testing and adoption

Executive summary

The provider receives leads from its website, referrals, partner networks and outbound activity. A single opportunity may involve an initial consultation, technical discovery, solution design, proposal revisions and approval from several decision-makers. Without a shared CRM process, deals can remain inactive without a clear next action, managers may struggle to forecast revenue and sales handoffs can depend on individual habits.

Liyan IT Solution's proposed Pipedrive approach centers on a clearly defined pipeline, consistent deal fields, activity scheduling and useful sales dashboards. The team can track the organization, contacts, expected value, target close date, next activity and risks for each opportunity. Where the selected plan supports it, automation can reduce repetitive administration while leaving important commercial decisions with the sales team.

Intended business outcome

Give sales representatives a clear next action for every active opportunity, help managers identify stalled deals earlier and improve the reliability of pipeline reviews and forecasts.

SOLUTION PRINCIPLE

Build the pipeline around the provider's real sales stages, and make every open deal accountable to an owner, a next activity and a meaningful expected outcome.

01 | Business challenges and requirements

IT services are often sold through consultative conversations rather than a simple product checkout. Prospects may need to align technical requirements, budgets, security reviews, procurement and internal approvals before committing. The CRM must make progress and blockers visible without burdening representatives with unnecessary administration.

Key challenges in the scenario

- Lead and company details are scattered across spreadsheets, email threads and partner referral records.
- Sales stages are interpreted differently across representatives, making pipeline reviews inconsistent.
- Follow-up meetings, proposal reviews and promised callbacks are tracked in personal calendars or notes.
- Deals can remain open for long periods without a defined next activity, owner action or documented blocker.
- Managers have limited visibility into deal value, expected close dates, conversion rates and stalled opportunities.
- Technical discovery and commercial proposal details may not be summarized consistently before internal review.
- Sales reporting takes manual effort and can become outdated before management meetings.

Requirements mapped to Pipedrive

Requirement	Proposed approach
Central sales records	Organize people, organizations, leads and deals with consistent ownership and key properties.
Visual pipeline	Create stages aligned to qualification, discovery, solution design, proposal, negotiation and decision.
Activity discipline	Schedule calls, meetings, proposal reviews and follow-up tasks against each deal.
Deal qualification	Capture service type, estimated value, decision process, expected close date and key risks.
Automation	Where supported by the selected plan, create reminders or field updates based on agreed events.
Management visibility	Use dashboards and reports to review pipeline value, conversion, activity completion and deal ageing.
Integration readiness	Assess website forms, email, calendar, proposal tools and delivery systems for approved integrations.

Discovery and scope decisions

Liyan IT Solution would confirm the Pipedrive subscription, number of users, current lead sources, data volume, required reporting and tools that need to connect. Email synchronization, advanced automation, custom fields, lead routing and integration options vary by plan or connected application, so these should be validated before finalizing scope.

SUCCESS MEASURES

Set a baseline for first-response time, deals with a scheduled next activity, overdue tasks, stage ageing, proposal-to-win conversion, forecast variance and CRM adoption.

02 | Proposed Pipedrive CRM solution design

The proposed setup uses Pipedrive as the sales team's working view of prospects and deals. Pipeline stages, fields and dashboards should be kept consistent enough for reporting while remaining practical for representatives who update records throughout the day.

Core CRM components

Component	Role in the IT services workflow
Leads Inbox	Collect and review new prospects before moving qualified opportunities into the sales pipeline, where available in the configured setup.
People and organizations	Maintain contact and company details, decision-makers and relationship history.
Deals	Track service opportunity, value, pipeline stage, expected close date, owner and next action.
Activities	Schedule and record calls, discovery sessions, technical workshops, proposal reviews and follow-ups.
Products / services	Where configured, use consistent service or package information to support deal tracking.
Custom fields	Capture service line, lead source, urgency, technical fit, procurement stage and other agreed qualification data.
Automation and integrations	Reduce repetitive work and connect approved lead sources or communication tools, subject to plan and setup.
Insights and reports	Review pipeline value, win/loss patterns, activity completion and deals with no recent progress.

Example opportunity stages

New lead / incoming — Record source, company, contact and initial service interest.

Qualified — Confirm a relevant business need, service fit, stakeholder and approximate timing.

Discovery scheduled — Book a meeting to understand requirements, current environment and business priorities.

Solution scoped — Align the technical team and sales owner on scope, assumptions, dependencies and delivery approach.

Proposal sent — Record the proposal date, value, validity period and follow-up activity.

Negotiation / approval — Track questions, revisions, security or procurement review and decision timing.

Won / lost — Record the outcome and reason; initiate the agreed client onboarding or close-out process.

Integration and data quality

Website forms, email, calendar, proposal software and delivery platforms should be connected only after confirming which data needs to flow and which system remains the source of truth. Define field mapping, duplicate handling, consent requirements, synchronization direction and error monitoring. Clean imported records and test representative scenarios before moving the full sales history.

ACCESS AND GOVERNANCE

Set clear record ownership, define required fields at the right stages, limit access appropriately and document how deal values, close dates and lost reasons should be entered.

03 | Activity-led workflow and reporting

Pipedrive is most useful when the pipeline reflects the real sales process and each active deal has a practical next step. Automation should reinforce this habit rather than create unnecessary alerts or replace judgment in complex sales conversations.

Illustrative lead-to-client workflow

1. Capture the prospect

A lead arrives from a website form, partner referral or outbound activity. The source, company and service interest are recorded.

2. Qualify the opportunity

The representative confirms business need, likely scope, urgency, stakeholders and whether a discovery conversation is appropriate.

3. Schedule discovery

A call or workshop is created as an activity, with an owner, date and preparation notes.

4. Define the solution

The sales owner coordinates technical input and records scope, assumptions, dependencies and the estimated commercial value.

5. Send and track the proposal

The deal moves to the proposal stage, and a follow-up activity is scheduled to confirm receipt and address questions.

6. Manage decision blockers

The owner records procurement steps, security review, budget approval, revised scope and next decision date.

7. Close and hand over

The outcome and lost reason are recorded. Won deals move through the agreed handover process for onboarding and delivery.

Automation candidates

- Create or prompt a follow-up activity when a deal enters a key stage, where supported.
- Flag deals that have no upcoming activity or have remained in a stage beyond the agreed threshold.
- Notify deal owners when a proposal follow-up date is due.
- Standardize selected fields or reminders when a deal is marked won or lost.
- Use a required lost reason to improve reporting on price, timing, scope, competition or fit.
- Create a handover checklist for won opportunities before delivery begins.

Management dashboards

Report	Question it helps answer
Pipeline by stage	What value and number of deals sit at each sales stage?
Deals without next activity	Which open opportunities risk being forgotten?
Activity completion	Are discovery calls and proposal follow-ups happening on time?
Forecast and close dates	Which deals are expected to close, and how reliable are those estimates?
Win/loss analysis	Why do prospects choose or reject the provider's services?

REPORTING DISCIPLINE

Agree the meaning of each stage and metric. Pipeline value is not guaranteed revenue; forecasts should reflect evidence, timing and realistic close probabilities.

04 | Implementation roadmap and expected outcomes

A phased implementation allows the provider to align sales stages, migrate clean data and establish consistent activity habits before introducing more advanced automation or integrations.

Suggested delivery roadmap

Phase	Key activities	Deliverable
1. Discover	Review sales process, lead sources, users, current tools, data and reporting needs.	Approved requirements and scope
2. Design	Define pipeline stages, fields, qualification rules, ownership and dashboard measures.	CRM process and data design
3. Configure	Set up pipelines, fields, views, activities, reports and supported automation.	Configured test environment
4. Prepare & connect	Clean and map data, test imports and connect approved lead sources and tools.	Validated records and integrations
5. Test & train	Test deal movement, reminders, permissions, reporting and real-world sales scenarios.	User acceptance sign-off
6. Launch & optimize	Go live, support users, review adoption and refine the process from actual usage.	Live CRM and improvement backlog

Expected business benefits

- A clear visual view of every active sales opportunity.
- More consistent scheduling and completion of follow-up activities.
- Earlier visibility into stalled deals, blockers and uncertain close dates.
- Improved pipeline reviews and more structured sales forecasting.
- More consistent information for proposal preparation and client handover.
- A practical foundation for future integrations with website, communication and delivery tools.

How outcomes should be reviewed

Review results at 30, 60 and 90 days after launch. Compare response time, deals with next activities, overdue tasks, stage ageing, conversion and forecast variance with the agreed baseline. Use representative feedback and validated CRM data to adjust fields, reminders and reporting.

Why Liyan IT Solution

Liyan IT Solution supports CRM implementation, customization, workflow automation, data migration, integration and ongoing technical support. The focus is on aligning the pipeline with how the sales team works, making next steps visible and giving managers a more dependable view of sales activity.

LET'S DISCUSS YOUR PIPEDRIVE REQUIREMENTS

Share your sales process, lead sources, reporting needs and tools that should connect to Pipedrive. Liyan IT Solution can help define a practical CRM setup around your team's workflow.

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