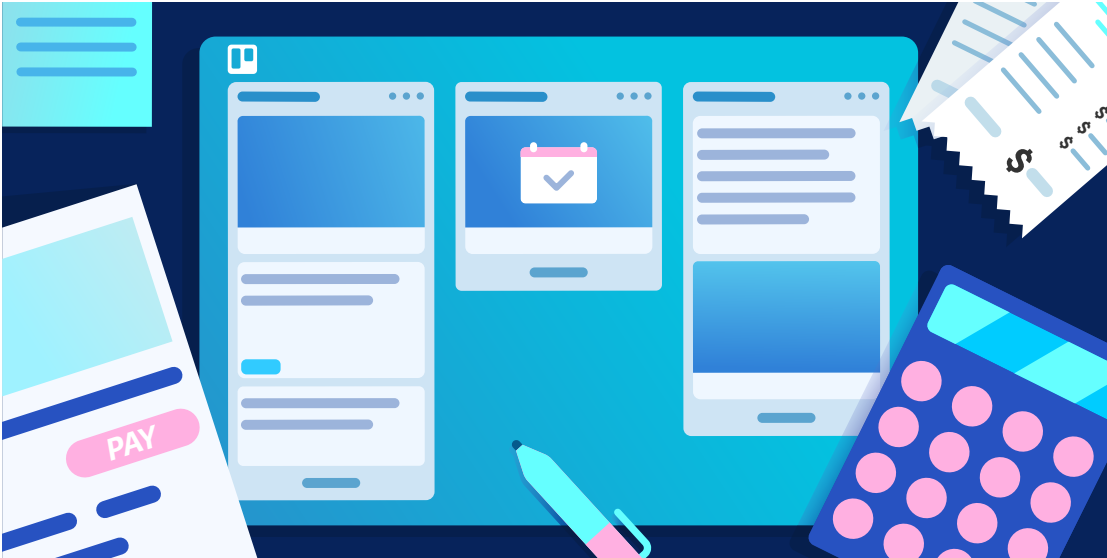




# From Cold Lead to Closed Deal: How to Use Trello Optimize Sales Deals

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# From Cold Lead to Closed Deal: How To Use Trello To Optimize Sales Deals

Sales teams rely on a variety of tools to manage to-dos so they can focus on what they do best—building relationships and closing deals. But these tools can sometimes become roadblocks to productivity, creating busy work instead of better workflows.

Searching inboxes for that perfect email pitch or sifting through tons of data in cumbersome CRM software are common activities that take time away from focusing on generating leads and converting them to customers.

And as your sales team grows, it's crucial to have strong-yet-simple workflows and processes in place so new team members can jump in and contribute to hitting KPIs and closing new customers (rather than learning how to input 50 different fields with details).

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With Trello, you can easily focus on what really matters in your sales pipeline and close more deals. From a cold lead to a closed deal, Trello allows sales teams to:

- View the sales cycle in a single, unified view.
- Reduce tedious admin work and bring all activity happening across multiple apps into one workspace.
- Spend less time checking all of your different work apps and more time actually optimizing your deals.

In this whitepaper, you'll discover the workflows your sales team can use to optimize processes and deals with our best Trello tips, template boards, Power-Ups, and integrations. Let's get started so you can be on your way to ABC (always be closin').

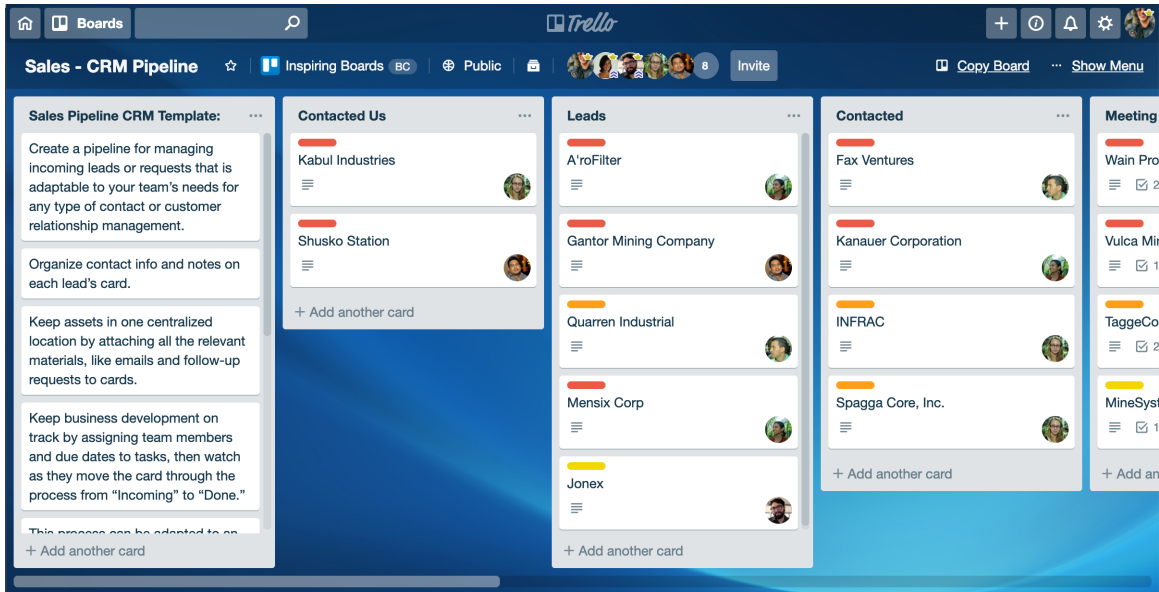


# Nurture And Close Leads Faster With A Clear Sales CRM Workflow

So how can you build a process that truly supports your sales team?

Trello can help you break the cycle of unproductive sales activities, manage your team's workload more effectively, and motivate action by getting everyone on the same page.

The layout of the board provides a clear view of the entire sales pipeline, including lead status, deal assignments, conversation history and more with a visual, real-time view that everyone can access to adapt and manage whether at their desk or on the go from a mobile device.



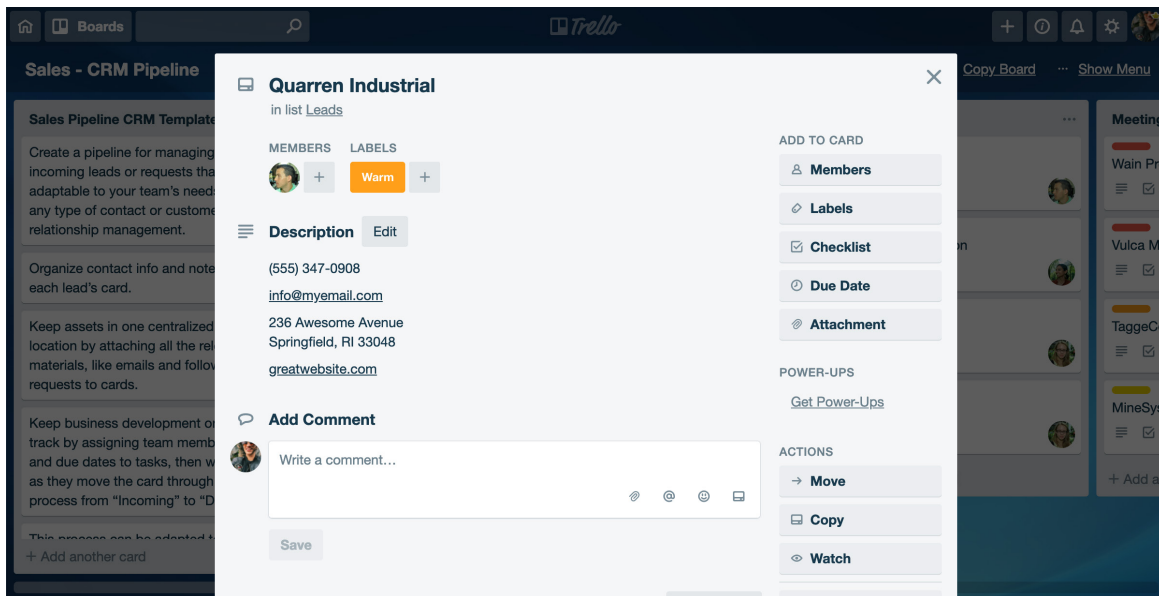
Leads enter the pipeline and can easily move through the process, with list stages customized for your unique sales funnel. Each card on the board is a lead and sales team members can tag themselves on cards as they come in, in order to claim that specific lead.

But this Sales CRM workflow is so much more robust than moving cards through the pipeline. Here are some incredible ways your sales team can communicate, collaborate, and close deals—all within Trello:

## Collaborate With Details: Card Covers and Backs

You can set up your cards to represent an entire deal or potential client profile. Regardless of your choice, you can store a ton of valuable information on the card.

On the front of the card, the Card Title becomes the name of the company or the person's name. [The Custom Fields Power-Up](#) lets you include relevant information about the lead so you can see these details right from the board view. You can create a Custom Field to show the contact's email, phone number, expected deal value, or other contact info.



Once you open the card, the Card Description and Comments section are full of opportunities for communication and collaboration.

In the Description field, you can include contact information, the initial contact details, information about the account and contact person(s), any limitations or concerns they have, the cost being discussed, and anything else that would work to shape the sale.

As the lead is nurtured, progress updates and emails are added through comments and each lead develops a comprehensive timeline of the relationship. Tracking this information in one place makes it easier for Sales Directors and other team members to easily jump in to learn more about the lead. No more lost details in endless email chains!

And you don't have to start over every time: Keep a "template" card on the board, and simply copy it over to the pipeline each time a new prospect comes through the door.

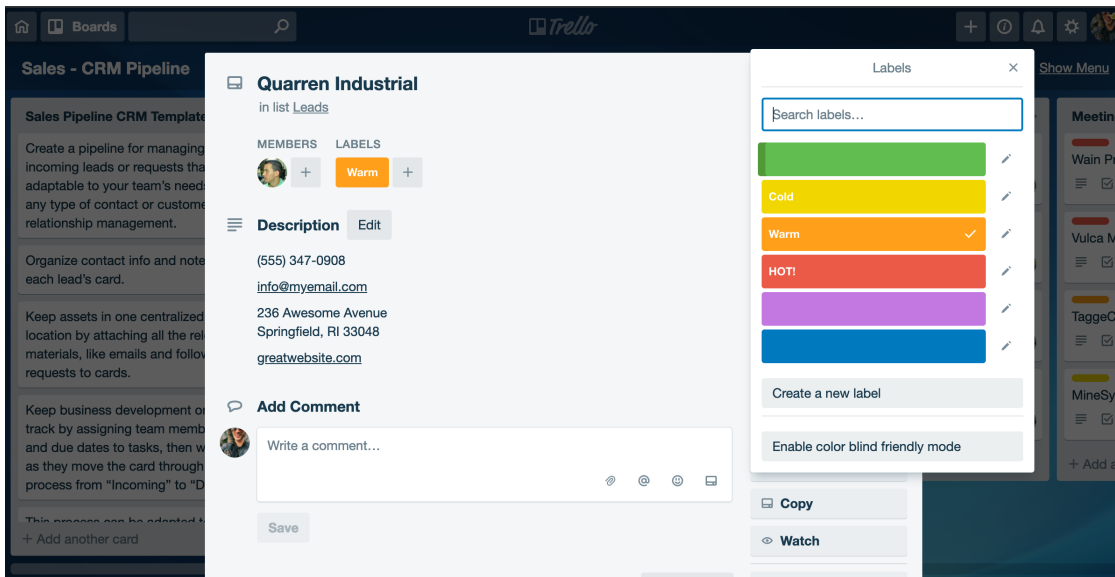
## Organize Communication With Email-To-Board

You can finally stop wasting time on all that admin work. Trello's email-to-board feature allow you to forward all your lead communications to specific cards on the board. Each card has its own email address so when you get a contact's email address, create a filter in your email that automatically sends all communication with that contact to the email address for their Trello card.

You can also use the [Gmail Add-on](#) to connect your emails to a specific card.

## Use Labels For Funnel Stages

Use a color coded label to note at which stage of the funnel a lead is in. You can assign labels such as MQL, SQL, contacts that require follow up from you, and contacts that you are waiting on.



Looking at your deal flow, a color system lets you quickly see who is waiting to hear from you and who you should be pinging again.

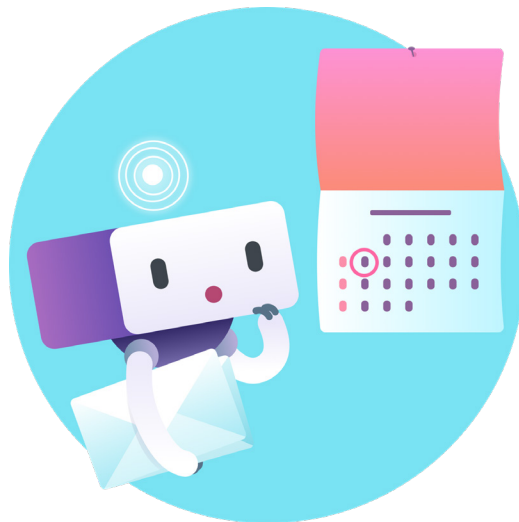


## Move Leads Along The Funnel With Time In List Power-Up

Do some leads feel like they take forever to close? Without a way to track how it takes to convert leads into happy customers, sales teams don't have intel in their sales cycle length.

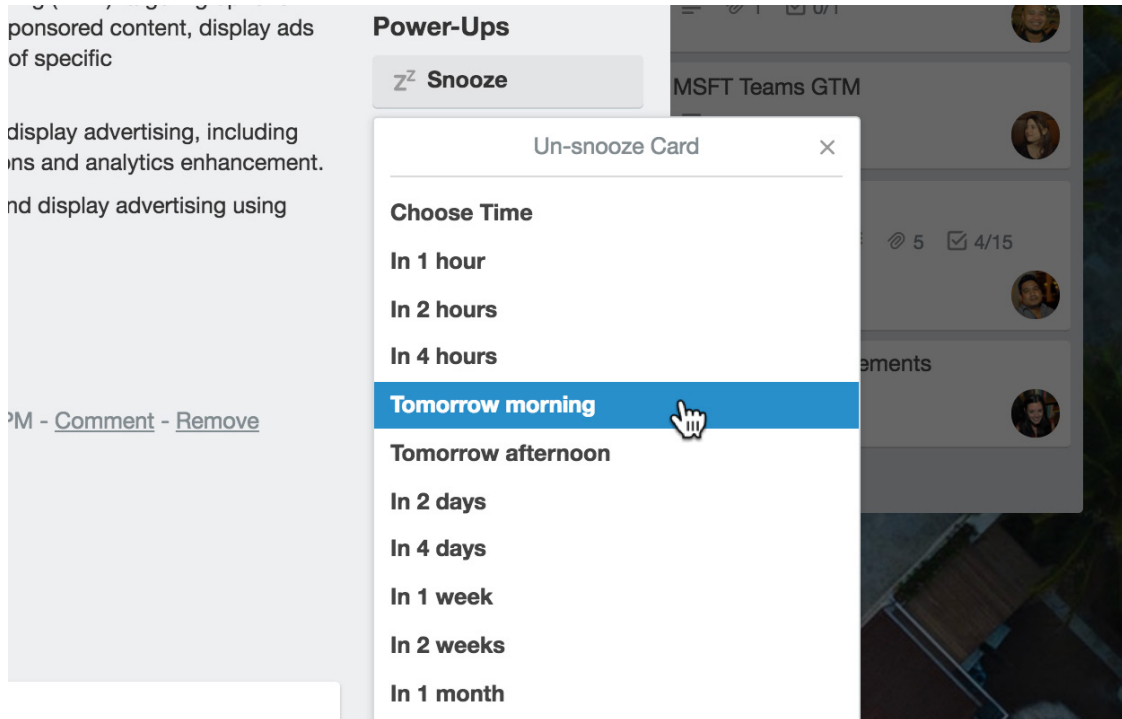
[The Time In List Power-Up](#) automates this process for you right in the Trello cards. Simply add the Power-Up to your board and see how long each card has been in the current list on the front of every card.

Based on the lists, you can also track which stage of the funnel took the longest. If a lead is stuck in one phase of the funnel for days or week, you can use the Comments to rally the troops and ask for ways to reinvigorate the lead and move it along to the closed deal list.



## Receive Reminders To Follow Up With Leads

Sometimes leads are hanging around in your funnel because it's not the right time for the sale or the contact asked you to follow up at a later date. With the [Card Snooze Power-Up](#), you can set a date and time to follow up.



The lead is then archived and when that date comes, the card will automatically re-appear in the list you assign. Now you can keep your Sales CRM Board clean without missing a beat.

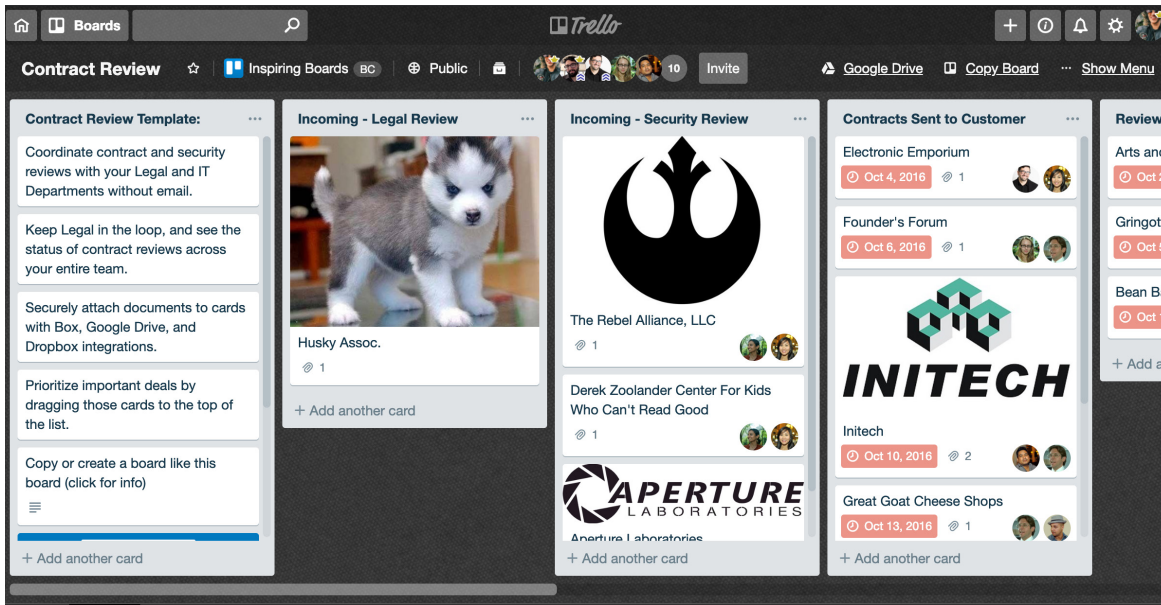
[Check Out The Board](#) →



## Keep Legal In The Loop When A Deal Is Won

One of the most crucial parts of closing a sales deal is legal review and the paperwork involved to sign on the dotted line.

Once a deal is won, your team can easily copy that card over to a Legal & Contracts Review, which kicks off the final stage of closing the deal.



To make this seamless as possible, it's best to bring everyone involved in this process onto one Trello board. This removes silos between departments and prevents correspondences and important documentation getting lost in email inboxes.

Legal and security documents are placed on the card back using Trello's latest integration with Google Drive, allowing the team to have all the documents at their fingertips without any additional work.

With Trello Enterprise, your team can have piece of mind knowing that all user data is encrypted at rest and in transit, and intrusion detection measures are in place 24/7.

This method of internal communication is invaluable for cross team communication between Sales and Legal.

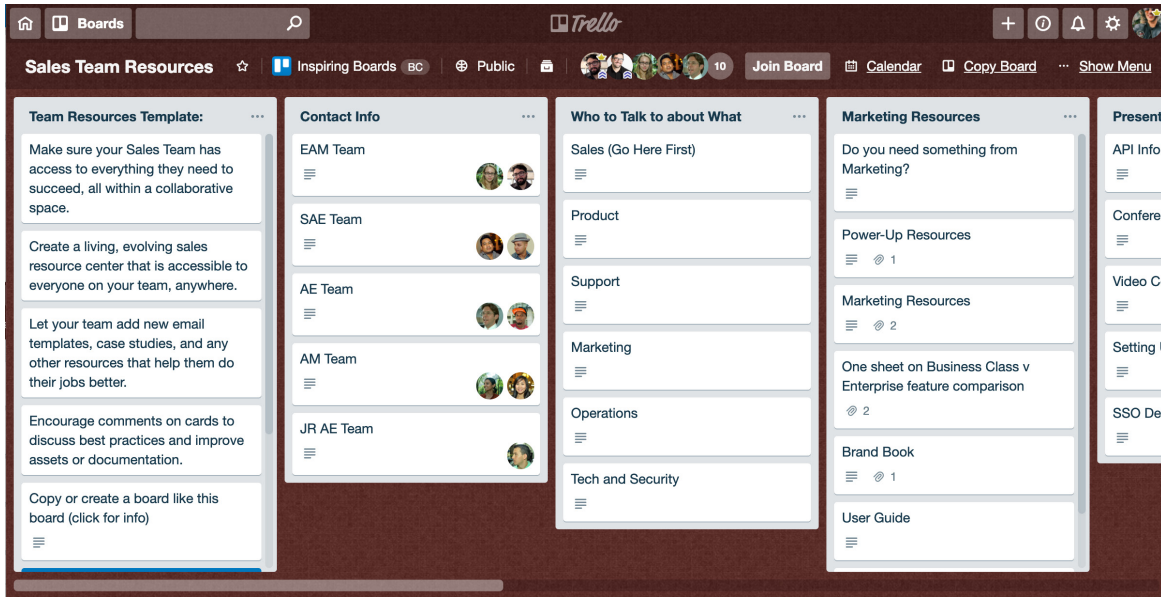
[Check Out The Board](#) →



## Arm Your Sales Team With Brag Books And Resources

For your sales team to do their job and move those leads along the pipeline, they need easy access to resources and marketing materials to convince and convert their contacts.

Make sure your Sales Team has access to everything they need to succeed, all within a collaborative space, with this Sales Resources board. This board becomes a living, evolving sales resource center that is accessible to everyone on your team, anywhere.



Your marketing and sales teams can easily collaborate to add new email templates, case studies, pitch decks, and pricing sheets.

Team members can use comments on cards to discuss best practices and improve assets and documentation. Integrating this board with Google Drive, Dropbox, or OneDrive ensures that everyone has access to the most up-to-date resources.

[Check Out The Board](#) →



# Essential Power-Ups and Integrations For Sales Teams and Workflows

Trello integrates with the tools your sales team already loves to use.

## **SALESFORCE**

The [Salesforce Power-Up](#) for Trello brings information about opportunities, leads, contacts, and cases to your Trello cards. See the health of a Sales pipeline and dive into specific opportunities without leaving Trello whether you're on the go or at your desk.

## **PIPEDRIVE**

The [Pipedrive Power-Up](#) automatically creates Trello cards when you start, close or move a deal to a selected stage in your sales pipeline. It also lets you pull deal information straight into Trello from Pipedrive, ensuring automatic and faultless handover between sales and the rest of your organization.

## **ZOHOCRМ**

The [Zoho CRM Power-Up](#) helps sales teams close more deals by helping them categorize and prioritize leads with Trello. This integration can help track the sales pipeline ensuring no leads go unnurtured. Board members can collaborate as a team and contribute towards closing deals faster.

## **SLACK**

No matter where your sales team is working, the [Slack Power-Up](#) for Trello makes it simple to keep your communication and collaboration apps connected so that no important deal updates or activities fall through the cracks.

## **GOOGLE DRIVE**

The [Google Drive Power-Up](#) for Trello brings your files and folders to Trello cards. Search Google Drive right from Trello and attach relevant files and folders.

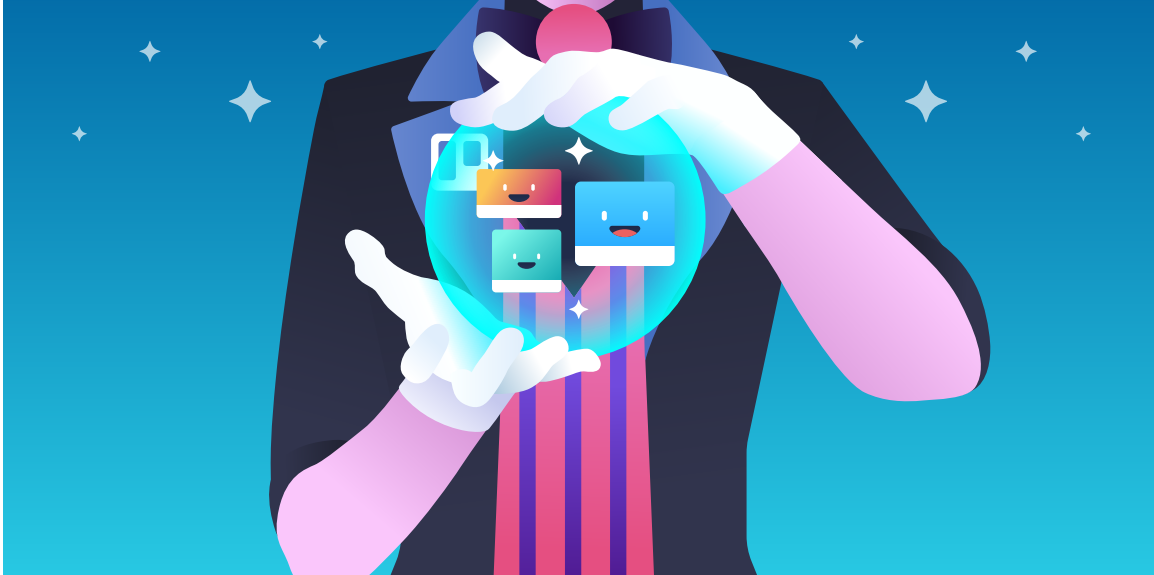
## **DROPBOX**

The [Dropbox Power-Up](#) for Trello brings your files and folders to Trello cards. The file picker lets you search Dropbox right from Trello and attach relevant files and folders. See real-time details and live previews, with links to take you right to Dropbox.

## **ONEDRIVE**

The [OneDrive Power-Up](#) lets you navigate OneDrive right from Trello to attach relevant files. Copy and paste links to OneDrive folders onto Trello cards to attach folders. See previews and latest details, with links taking you directly to OneDrive to work on documents and access files.





# Easily Manage Your Sales Team From One Central Location With Trello Enterprise

Create a central productivity hub for all of your team's projects—accessible from any device, anywhere. With Trello Enterprise, your team can easily navigate users, security, and privacy settings through a single dashboard.

Trello Enterprise is flexible enough for all teams to build productive, customized workflows that encourage collaboration. Here are other exciting features exclusive to Trello Enterprise:

Enjoy Unlimited Trello	Single Sign-On (SSO)
Organization-Wide Permissions	Attachment Restrictions
Membership Controls	Simple Data Export
Advance Security	Super Admin
Phone and Priority Email Support	Simplified Billing

[Upgrade to Enterprise →](#)

