INTEMPT ACADEMY

People, companies, pipeline

The 17 steps to build a working pipeline, from your first user profile to a forecast you can read. Tick them off as you go.

- [ ] 1. Open Users with no filters and switch lists with the selector (All users or a saved segment). — Lesson 2.1
- [ ] 2. Open one profile and check its Activity tab (event history) next to the Attributes sidebar. — Lesson 2.1
- [ ] 3. Click Columns and add an account-level column; scroll until more rows load. — Lesson 2.1
- [ ] 4. Open Accounts, click Add account, enter Company name and Domain, click Create. — Lesson 2.2
- [ ] 5. On Users (or Accounts), click Filters, add two conditions joined with OR, then Save as new segment, name it and click Save segment. — Lesson 2.3
- [ ] 6. Open Deals, Board tab. — Lesson 2.4
- [ ] 7. Click Create deal, fill Deal name, Deal stage (first stage), Value, Deal owner, Deal type, Associate with account (your account), click Create. — Lesson 2.4
- [ ] 8. Drag the card one stage right on Board, then check Value forecast to close on the Analytics tab. — Lesson 2.4
- [ ] 9. Open the deal and confirm the closing stages are Won (100%) and Lost (0%). — Lesson 2.4
- [ ] 10. Open Tasks, click Create task, set Task type, Associate with user, pick your deal under Deal, click Create. — Lesson 2.5
- [ ] 11. Know where LinkedIn sub-actions live: Start a LinkedIn task to choose View profile, Send message or Connection request. — Lesson 2.5
- [ ] 12. Open Attributes, click Create attribute, and under AI Attribute Types pick Likelihood; set Predict event and Prediction window, then Create attribute. — Lesson 2.6
- [ ] 13. Find the Likelihood column on a profile; its type is Scored Tier. — Lesson 2.6
- [ ] 14. Scan the sidebar for a Pipeline page (there is none), then open Accounts, pick a company, open its Deals tab and open one deal. — Lesson 2.7
- [ ] 15. Open Project settings, Users, Data Model, Deals tab: under Deal stages edit a Probability and read Used in. — Lesson 2.8

- [ ] 16. On Deals, Analytics tab, change the date range from the default last 30 days, then pick one rep in the deal owner filter (default All deal owners). Lesson 2.9

- [ ] 17. Read Value won (of forecast), Av. time to close and Value of deals by stage at that range. Lesson 2.9

YOU ARE DONE WHEN

- A saved segment of yours appears in the Users list selector with a live row count.
- A deal on your account sits on the Board and moved one stage.
- A task is attached to that deal with a type.
- A Likelihood attribute exists and shows Scored Tier on profiles.
- Deal stages show Probability and Used in for each stage.
- Analytics charts redraw after you change date range and deal owner.

CORE STACK

- **Intempt console: Users, Accounts, Deals, Tasks** This is where every lesson in this course happens
- **Attributes (AI Attribute Types)** This is how you add a predictive score to every profile
- **Project settings Data Model** This is where you set your deal stages and win probabilities

OPTIONAL UPGRADES

- **Journeys Create task step** This is how follow-up tasks get created for you, automatically
- **HubSpot** This is how your contacts, companies and deals sync in from HubSpot
- **JavaScript SDK group()** This is how people get linked to their company in code
- **Data import** This is how you bring in the customers you already have