



# Getting Started with NextIsWhat

NextIsWhat tells your team what's next.

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**[nextiswhat.com](https://nextiswhat.com)**

## Your first 14 days at a glance

### Day 1

Sign up and bring in your leads.

### Day 1-2

Add your team.

### Every day

Work from Next Action.

### Every day

The bar shows days left in your trial.

### By day 14

Pay by UPI and keep going.

**The one rule.** Every lead and deal always has one next step, one owner and one due date. NextIsWhat asks for it every time you finish something, so nothing is ever forgotten.

One next step

One owner

One due date

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# 1 STEP 1 Start your free trial

**Why this matters.** Fourteen days with every feature switched on. No card, no payment, nothing to install.

**Tip** Use your company email, not a personal one. Sign-up is by email and password; there is no "Sign in with Google".

nextiswhat.com

The screenshot shows the NextIsWhat website. At the top left is the NextIsWhat logo. At the top right are links for "Log in" and a green "Start Free" button. The main heading reads "Know exactly what to do next, every morning." Below this is a paragraph: "NextIsWhat turns your leads, deals and campaigns into one short list each day: who to call, what to say, and what is stuck. Every update sets the next step, so no follow-up is ever forgotten." There are two buttons: a green "Start Free for 14 Days" button and a white "See How It Works" button. Below the buttons is the text: "No payment needed to start. Works on phone and laptop." On the right side of the page is a preview of the NextIsWhat mobile app. The app interface shows a header with the NextIsWhat logo and a "Menu" button. Below the header is the user's name "Priya Nair". The main section is titled "WhatNext" and shows a date "Friday 2 October" and a status "Follow-ups on time this week: 82% (9 of 11)". There is a section for "OVERDUE 2" with two items: "Iyer Foods" (Waiting for Finance — Invoice for the first order, Follow up - Tue 29 Sep) and "Patel Packaging" (Book the plant visit, Yesterday). Each item has a green "Update" button. Below the "OVERDUE" section is a section for "TODAY 3" with one item: "Sharma Traders".

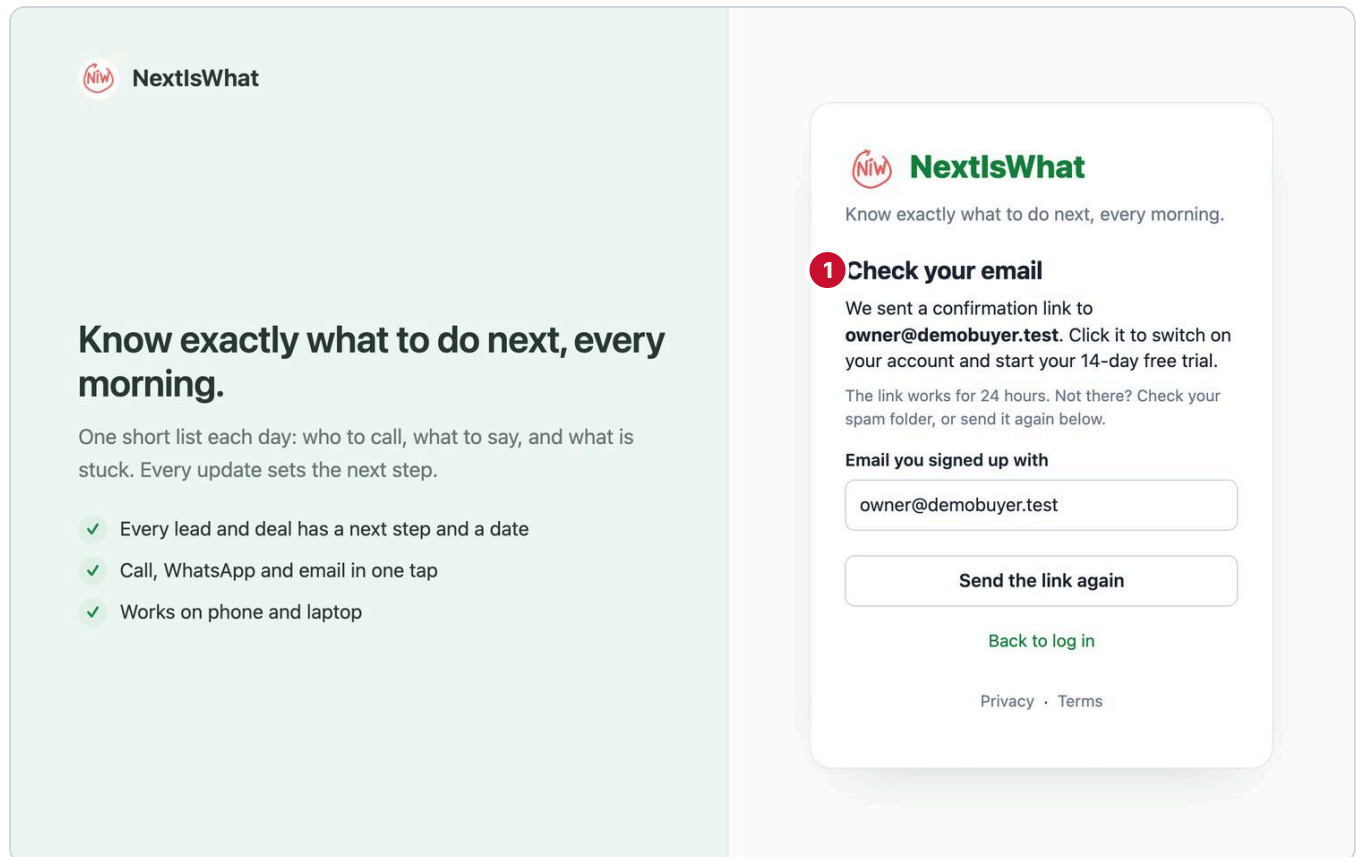
1 Click Start Free for 14 Days.

## The sign-up form

- 1 Type your company name. It becomes the name of your workspace.
- 2 Type your company email. You log in with it.
- 3 Choose a password of 8 characters or more.
- 4 Click Start Free Trial.

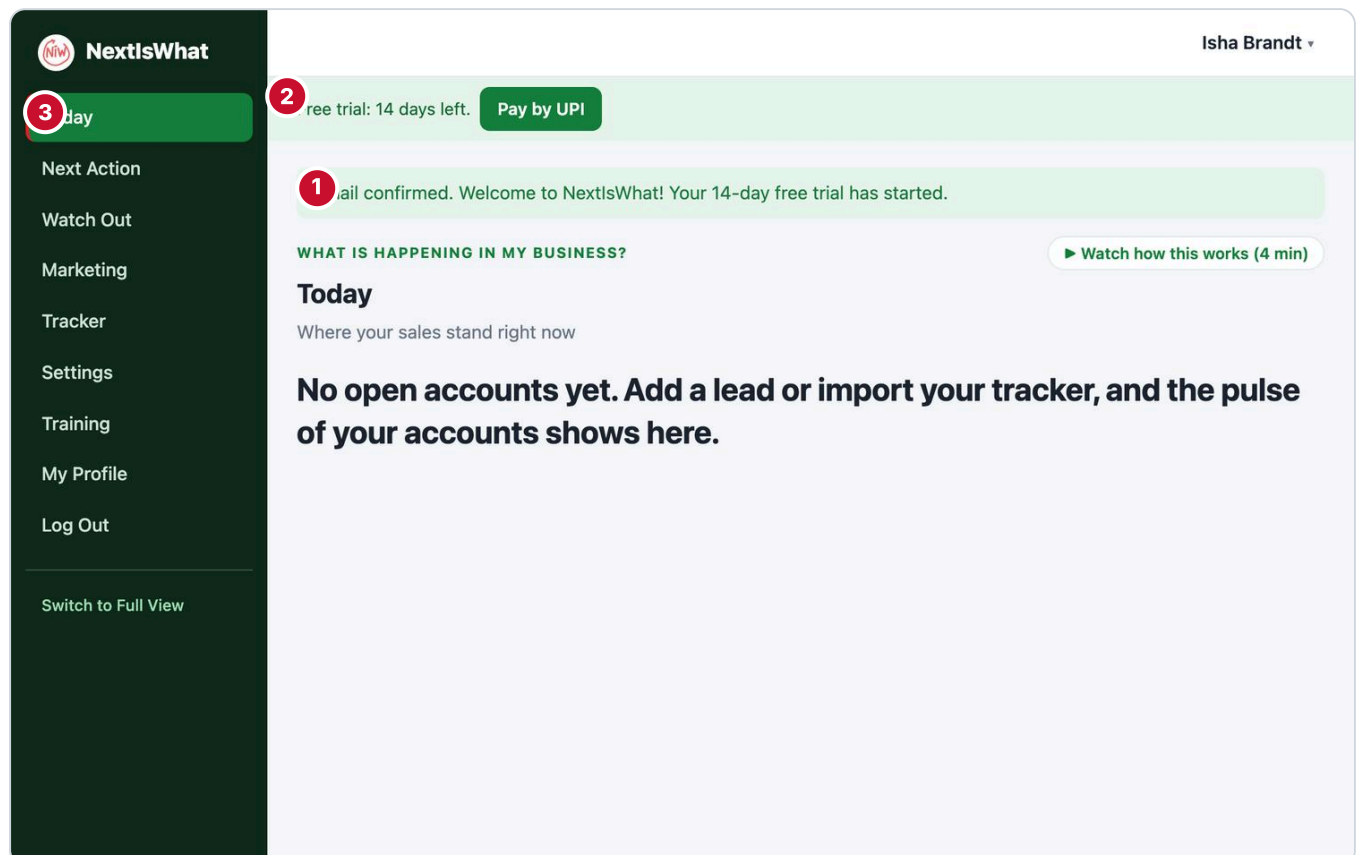
The form also asks your name and mobile, and how you sell. That last one is optional: it sets up stages that suit you, and you can change them any time.

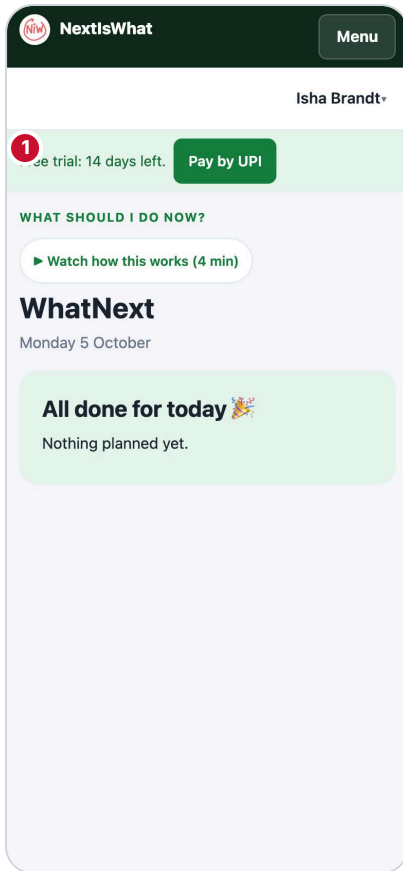
## Check your email



- 1 We send a confirmation link to your email. Open it and click the link.  
Your 14 days start when you click the link, not when you fill in the form.

## Your first login





On a phone

- 1 A welcome message confirms your trial has started.
- 2 This bar always shows how many trial days are left, with a Pay by UPI button.
- 3 Your menu. New companies start with a short, simple menu.

## 2 STEP 2 Bring in your leads and companies

**Why this matters.** Your customers are probably in a spreadsheet today. Bring them in once, and every one gets its first next step.

**Tip** The first row of your file must have column names, like Name, Company, Mobile, Email. Up to 5,000 rows per file.

### Leads

NextIsWhat

THINK

Today

Signals

Watch Out

Not Moving

ACT

Next Action

MANAGE

**Leads**

Deals

Companies

Contacts

Tracker

GROW

Marketing

Answers

Search name, phone, email...

1

Isha Brandt

Free trial: 10 days left. Pay by UPI

WHO ARE MY PROSPECTS?

**Leads**

3 found

+ New Lead 1 Upload a List Export this list

Hot leads Nurture list Not called in 24 h New

Name, company, phone, email Open leads Everyone All sources All campaigns

Any intent Filter

| Lead                                       | Priority | Phone         | Status    | Intent    | Source / campaign | Owner       | Next action           |
|--------------------------------------------|----------|---------------|-----------|-----------|-------------------|-------------|-----------------------|
| <b>Rohan Velankar</b><br>Nimbrel Foods     | —        | +919000052001 | Qualified | Hot - 75  | Trade Expo        | Isha Brandt | Tomorrow 6:00 PM      |
| <b>Sara Mendekar</b><br>Halbrook Logistics | —        | +919000052002 | Contacted | Warm - 65 | Website           | Isha Brandt | 7 Oct, 6:00 PM        |
| <b>Kabir Antalker</b>                      | —        | +919000052003 | New       | Warm - 65 |                   | Tara Volkin | Overdue since 6:00 PM |

1 Open Leads, then click Upload a List.

## Upload a list

**NextIsWhat**

Search name, phone, email...

Free trial: 10 days left. **Pay by UPI**

**Upload a list**

Prospect lists always come in as Leads. From Excel or Google Sheets, saved as CSV. Up to 5,000 rows per file.

**1 New prospects to call**

A list of people or companies you haven't sold to yet. They become **Leads**, each under its Company, with a first next step.

**Deals already in progress**

Your sales tracker with stages like "Quote sent" or "Negotiation". They come in as **Deals** at their real stage.

**CSV file**

**2** Choose File demo-leads.csv

**3 Check File**

**How to prepare the file**

1. The first row must have column names. You need **Name** (or **Contact**, or **Company**). Also recognised: Category, Company, Mobile (or Phone), WhatsApp, Email, Designation, City, Industry, Website, Priority, Product, Source, Campaign, Notes. Capital letters don't matter.
2. Notes can be long (up to 16,000 characters) and have line breaks.

- 1** Choose New prospects to call. Each row becomes a lead, under its company, with a first next step.
- 2** Click Choose File and pick your CSV file.
- 3** Click Check File.

Already working on deals in a sheet with stages like "Quote sent"? Choose Deals already in progress instead: you match your columns, see a preview, and they come in as deals at their real stage.

## Check before you import

 **NextIsWhat**

THINK

Today

Signals

Watch Out

Not Moving

ACT

Next Action

MANAGE

**Leads**

Deals

Companies

Contacts

Tracker

GROW

Marketing

Answers

Search name, phone, email...

 1

Isha Brandt ▾

Free trial: 10 days left. **Pay by UPI**

[▶ Watch how this works \(4 min\)](#)

### Upload a list

Prospect lists always come in as Leads. From Excel or Google Sheets, saved as CSV. Up to 5,000 rows per file.

**Ready to import 10 leads**  
**demo-leads.csv:** 10 rows · 10 will be imported · 0 duplicates skipped  
**Columns matched:** Name ← "Name" · Company ← "Company" · Mobile ← "Mobile" · Email ← "Email" · Designation ← "Designation" · City ← "City" · Source ← "Source"

| Row | Name        | Category | Company              | Mobile        | Email                       | City      | Note |
|-----|-------------|----------|----------------------|---------------|-----------------------------|-----------|------|
| 2   | Anil Demo   |          | Demo Buyer Two Ltd   | +919000071001 | anil@demobuyertwo.test      | Pune      |      |
| 3   | Bina Demo   |          | Demo Buyer Three Ltd | +919000071002 | bina@demobuyerthree.test    | Mumbai    |      |
| 4   | Chetan Demo |          | Demo Traders Four    | +919000071003 | chetan@demotradersfour.test | Bengaluru |      |

- 1 Check the preview: how many leads will be added, and any rows that are skipped and why. Choose who gets the leads and when the first call is due, then click Import.

Nothing is saved until you click Import. Duplicates (same name and company) are skipped, so nothing is added twice.

## Your new leads

**NextIsWhat**

1
Isha Brandt ▾

THINK

Today

Signals

Watch Out

Not Moving

ACT

Next Action

MANAGE

**Leads** 3

Deals

Companies

Contacts

Tracker

GROW

Marketing

Answers

Free trial: 10 days left. [Pay by UPI](#)

10 imported, 0 skipped as duplicates.

WHO ARE MY PROSPECTS?

**Leads** [+ New Lead](#) [Upload a List](#) [Export this list](#)

10 found

Showing the 10 leads imported from demo-leads.csv on 5 Oct 2026, 8:59 PM. [Show All Leads](#)

Hot leads Nurture list Not called in 24 h New

Name, company, phone, e All statuses ▾ Everyone ▾ All sources ▾ All campaigns ▾

Any intent ▾ Filter

| Lead ID | Priority | Phone         | Status | Intent    | Source / campaign | Owner       | Next action       |
|---------|----------|---------------|--------|-----------|-------------------|-------------|-------------------|
| 1 d     | —        | +919000071001 | New    | Warm · 65 | Website           | Tara Velkin | Tomorrow 10:00 AM |

**1** Your leads are in, each with an owner and a first next step.

## Using Excel?

 **NextIsWhat**

THINK

Today

Signals

Watch Out

Not Moving

ACT

Next Action

MANAGE

**Leads** 3

Deals

Companies

Contacts

Tracker

GROW

Marketing

Answers

Free trial: 10 days left. **Pay by UPI**

[▶ Watch how this works \(4 min\)](#)

### Upload a list

Prospect lists always come in as Leads. From Excel or Google Sheets, saved as CSV. Up to 5,000 rows per file.

**New prospects to call**

A list of people or companies you haven't sold to yet. They become **Leads**, each under its Company, with a first next step.

**Deals already in progress**

Your sales tracker with stages like "Quote sent" or "Negotiation". They come in as **Deals** at their real stage.

This is an Excel file, not a CSV. In Excel: File → Save As → choose "CSV UTF-8 (Comma delimited)" → Save, then upload that file.

**CSV file**

Choose File

demo-leads.xlsx

**Check File**

**How to prepare the file**

1. The first row must have column names. You need **Name** (or **Contact**, or **Company**). Also recognised: Category, Company, Mobile (or Phone), WhatsApp, Email, Designation, City, Industry, Website, Priority, Product, Source, Campaign, Notes. Capital letters don't matter.
2. Notes can be long (up to 16,000 characters) and have line breaks.

NIW reads CSV files. If you upload an Excel (.xlsx) file, NIW tells you how to save it as CSV: in Excel, File → Save As → CSV UTF-8 (Comma delimited) → Save. In Google Sheets: File → Download → CSV.

Getting Started with NextIsWhat

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## Add one lead by hand

**NextIsWhat**

THINK

Today

Signals

Watch Out

Not Moving

ACT

Next Action

MANAGE

**Leads 3**

Deals

Companies

Contacts

Tracker

GROW

Marketing

Answers

WhatsApp (if different)

Email

Designation

City

Industry

Website

company.com

Priority

P1 / P2 / P3

Product

Source

— Pick source —

Campaign

— None —

Owner

Isha Brandt

2 next action

Stage

New

Who acts?

Sales — the owner does it

Type

Call

Next action

Intro call

When?

In 1 hour

Today 6 PM

Tomorrow 10 AM

In 2 days

Next week

Pick date & time

07/10/2026, 10:00 AM

After this (what normally follows)

- 1 On Leads, click + New Lead and type the name, company and mobile.
- 2 Every new lead must have its first next action: what to do, and when (a call within one hour, by default).
- 3 Click Add Lead.

## The lead's page

 **NextIsWhat**

THINK

Today

Signals

Watch Out

Not Moving

ACT

Next Action

MANAGE

**Leads** 4

Deals

Companies

Contacts

Tracker

GROW

Marketing

Answers

 1

Isha Brandt ▾

Free trial: 10 days left. [Pay by UPI](#)

Lead added.

[▶ Watch how this works \(4 min\)](#)

[Convert to Deal](#) [Edit](#)

### Kiran Demo

Demo Buyer Twelve Ltd · New · Owner: Isha Brandt

**1** : action 7 Oct, 10:00 AM

Stage: New

**Intro call**

Owner: Isha Brandt · due 7 Oct 2026, 10:00 AM

After this: Book demo

[Done — what's next?](#)

[First touch](#)

▶ Change, reschedule or hand over

**Done? Log what happened and what's next**

What did you do?

[Call](#) [WhatsApp](#) [Email](#) [Meeting](#) [Note](#)

**Contact**

+919000071012 [Copy](#)

[Start Call Timer](#)

[WhatsApp](#)

Mobile +919000071012

Email —

Designation —

City —

Source —

Intent Warm · 40

Added 5 Oct 2026, 9:00 PM

First contacted Not yet

**1** The next action is already set. Nothing waits without a next step.

## Companies

 **NextIsWhat**

THINK

Today

Signals

Watch Out

Not Moving

ACT

Next Action

MANAGE

Leads 4

Deals

**Companies**

Contacts

Tracker

GROW

Marketing

Answers

 **1**

Isha Brandt ▾

Free trial: 10 days left. **Pay by UPI**

**WHO DO WE WORK WITH?**

► Watch how this works (4 min)

**Companies**

29 companies

**Any Status** 29 **Deal in Progress** 1 **Customer** 1 **Lead** 14 **Nothing Open** 0  **Tickets** 3 open

**Search**

| <span>2</span> Company             | Status           | Category | Priority | Open leads | Deals  | Tickets | Next action                              |
|------------------------------------|------------------|----------|----------|------------|--------|---------|------------------------------------------|
| <b>Maravique Studio</b><br>Kochi   | Deal in Progress | —        | —        | 0          | 3 open | —       | <b>Overdue 2 d</b> Book demo             |
| <b>Orvanta Group</b><br>Chennai    | Deal in Progress | —        | —        | 0          | 3 open | —       | <b>Overdue 2 d</b> Follow up on proposal |
| <b>Pellucar Networks</b><br>Mumbai | Deal in Progress | —        | —        | 0          | 2 open | —       | <b>Overdue 2 d</b> Pricing call          |
| <b>Arquenta</b>                    | Deal in Progress | —        | —        | 0          | 2      | —       | <b>Overdue since 6:00 PM</b>             |

**1** Every company is filed automatically. Tabs show the status: deal in progress, customer, lead, or nothing open.

**2** Click a company to open it.

## One company, everything in one place

The screenshot displays the NextIsWhat CRM interface. On the left is a dark sidebar with navigation options: THINK (Today, Signals, Watch Out, Not Moving), ACT (Next Action), MANAGE (Leads with a red badge '4', Deals, Companies with a green highlight, Contacts, Tracker), and GROW (Marketing, Answers). The main area features a search bar, a notification bell with '1', and the user name 'Isha Brandt'. A green banner indicates 'Free trial: 10 days left' and a 'Pay by UPI' button. Below this, a 'Companies' section shows the profile for 'Tessaline Trading' with filters for Category, Priority, and Deal in Progress. It includes location (Pune), industry, website, and account owner (Dev Marlowe). A status bar shows 'Moving' with a green dot and 'last update just now'. Three summary boxes show financials: ₹4.8L Open deals (1), ₹2.4L Won so far (1), and ₹0 Invoices waiting for payment (0). A row of buttons allows adding '+ Next step', '+ Lead', '+ Deal', '+ Person' (with a red badge '2'), '+ Ticket', '+ Note', and '+ File'. A progress timeline shows stages: New, Qualified, Demo, Proposal sent, Negotiation (current), and Won. The 'Negotiation' stage is expanded, showing a 'Pricing call' next step scheduled for 'Wed 7 Oct, 6:00 PM'. A 'LATEST' log entry states 'Deal added: Negotiation.' On the right, the 'PEOPLE' section lists 'Tanvi Pendharin' as Head of Operations with contact buttons for Call, WA, and Email. The 'LEADS & DEALS' section shows 'Tessaline Trading — Renewal 22'.

- 1 History shows every call, message, note and change for this company.
- 2 Add a lead, deal, person, service ticket, note or file from these buttons.
- 3 Update logs what happened and sets the next step.

## Contacts

 **NextIsWhat**

THINK

Today

Signals

Watch Out

Not Moving

ACT

Next Action

MANAGE

Leads 4

Deals

Companies

**Contacts**

Tracker

GROW

Marketing

Answers

 1

Isha Brandt ▾

Free trial: 10 days left. **Pay by UPI**

**WHO ARE THE PEOPLE?** [▶ Watch how this works \(4 min\)](#)

**Contacts** **+ New Contact**

15 contacts

**Peop** 1 **Companies**

**Search**

| Name                                        | Company        | Mobile        | Email                           |                                                                |
|---------------------------------------------|----------------|---------------|---------------------------------|----------------------------------------------------------------|
| <b>Advik Bhatvel</b><br>Business Head       | Arquenta House | +919000010481 | advik.bhatvel@arquenta.example  | +919000010481<br><span>2</span> <b>Copy</b><br><b>WhatsApp</b> |
| <b>Anaya Kelvekar</b><br>Head of Operations | Zentrova Labs  | +919000010000 | anaya.kelvekar@zentrova.example | +919000010000<br><b>Copy</b><br><b>WhatsApp</b>                |
| <b>Arnav</b>                                | Velquor        | +919000010259 | arnav.kumbhoia@velquor.example  | +919000010259                                                  |

- 1 Switch between People and Companies.
- 2 Copy a number or open WhatsApp straight from the list.

## 3 STEP 3 Invite your team

**Why this matters.** Each person gets their own list. Salespeople see their own customers; managers see their team.

**Tip** Only the owner sees Settings. If your team is new to this kind of tool, keep Simple mode on for the first weeks.

### Settings → Team Members

The screenshot shows the 'Settings' page for 'NextIsWhat'. The left sidebar contains navigation links: THINK (Today, Signals, Watch Out, Not Moving), ACT (Next Action), MANAGE (Leads 4, Deals, Companies, Contacts, Tracker), and GROW (Marketing, Answers). The main content area has a search bar, a notification bell with '1', and the user name 'Isha Brandt'. A green banner indicates 'Free trial: 10 days left. Pay by UPI'. Below this is a 'Settings' section with '3 of 5 seats used' and a 'Watch how this works (4 min)' link. The 'Team Members' tab is selected, showing a table of team members:

| Name        | Email                | Role      | Reports to  | Gets new leads | Last login |      |
|-------------|----------------------|-----------|-------------|----------------|------------|------|
| Dev Marlowe | dev@demobuyer.test   | Sales rep | Isha Brandt | Yes            | never      | Edit |
| Isha Brandt | owner@demobuyer.test | Owner     | —           | Yes            | just now   | Edit |
| Tara Velkin | tara@demobuyer.test  | Sales rep | Isha Brandt | Yes            | never      | Edit |

Below the table is the 'Add a person' form with the following fields:

- 1** Name: Neha Demo
- 2** Email (they log in with this): neha@demobuyer.test
- Mobile: (empty)
- Role: Sales rep (dropdown)
- Reports to: — Nobody — (dropdown)
- 3** Temporary password (8+ characters): Welcome@2026

- 1** Type your colleague's name and work email.
- 2** Choose their role: Sales rep or Manager.
- 3** Give them a temporary password.
- 4** Click Add Person.

NIW does not send an invitation email. Share the email and temporary password with your colleague yourself; they can change the password in My Profile.

## Your team

 **NextIsWhat**

THINK

Today

Signals

Watch Out

Not Moving

ACT

Next Action

MANAGE

Leads 4

Deals

Companies

Contacts

Tracker

GROW

Marketing

Answers

 **1**

Isha Brandt ▾

Free trial: 10 days left. [Pay by UPI](#)

Neha Demo added. Share their email and temporary password with them; they can change it in My profile. [▶ Watch how this works \(4 min\)](#)

### Settings

4 of 5 seats used

[Company](#) [Plan and Payment](#) [Team Members](#) [Departments](#) [Baton Map](#) [Pipeline Stages](#) [Catego](#)

| 1 | Name        | Email                | Role      | Reports to  | Gets new leads | Last login |                      |
|---|-------------|----------------------|-----------|-------------|----------------|------------|----------------------|
|   | Dev Marlowe | dev@demobuyer.test   | Sales rep | Isha Brandt | Yes            | never      | <a href="#">Edit</a> |
|   | Isha Brandt | owner@demobuyer.test | Owner     | —           | Yes            | just now   | <a href="#">Edit</a> |
|   | Neha Demo   | neha@demobuyer.test  | Sales rep | —           | Yes            | never      | <a href="#">Edit</a> |
|   | Tara Velkin | tara@demobuyer.test  | Sales rep | Isha Brandt | Yes            | never      | <a href="#">Edit</a> |

#### Add a person

Name

Email (they log in with this)

Mobile

- 1 Everyone in your team, their role, who they report to, and whether they get new leads in turn.

## Simple mode

 **NextIsWhat**

THINK

Today

Signals

Watch Out

Not Moving

ACT

Next Action

MANAGE

Leads 4

Deals

Companies

Contacts

Tracker

GROW

Marketing

Answers

Free trial: 10 days left. [Pay by UPI](#)

HOW IS NIW SET UP?  
**Settings**

[Company](#) [Plan and Payment](#) [Team Members](#) [Departments](#) [Baton Map](#) [Pipeline Stages](#) [Catego](#)

**Company details**

Company name

Demo Buyer Pvt Ltd

Time zone

India (IST) ✓

GST number

Billing email

owner@demobuyer.test

Billing address (printed on your invoices)

[Save](#)

**Simple mode**

Your team sees only **Next Action** and **Tracker**: what to do now, with one Update button. Nothing is deleted; switch it off to see every screen again.

Simple mode

1 OFF ✓

2 [Save](#)

**Home for New Users**

What people see after signing in, until they pick their own in My Profile. Briefing is a calm page: a greeting, the top 5 for today, replies waiting, and one button to the full list.

Home

Next Action (Full or Simple) ✓

- 1 Simple mode shows your team only Next Action and the Tracker, with one Update button. Choose On or Off.
- 2 Click Save.

Getting Started with NextIsWhat

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## Settings → Pipeline Stages

 **NextIsWhat**

THINK

Today

Signals

Watch Out

Not Moving

ACT

Next Action

MANAGE

Leads 4

Deals

Companies

Contacts

Tracker

GROW

Marketing

Answers

 1

Isha Brandt ▾

Free trial: 10 days left. [Pay by UPI](#)

[▶ Watch how this works \(4 min\)](#)

### Settings

Probability is how likely a deal at that stage is to be won. It weights the pipeline and the priority score.

[Company](#) [Plan and Payment](#) [Team Members](#) [Departments](#) [Baton Map](#) [Pipeline Stages](#) [Catego](#)

| Order | Stage name    | Probability % | Open deals | In use                              |
|-------|---------------|---------------|------------|-------------------------------------|
| 1     | New           | 10            | 10         | <input checked="" type="checkbox"/> |
| 2     | Qualified     | 25            | 6          | <input checked="" type="checkbox"/> |
| 3     | Demo          | 40            | 6          | <input checked="" type="checkbox"/> |
| 4     | Proposal sent | 60            | 7          | <input checked="" type="checkbox"/> |
| 5     | Negotiation   | 80            | 6          | <input checked="" type="checkbox"/> |
|       |               | 100           | 0          | Always                              |

- 1 Your deal stages, each with its chance of winning. Rename them, change the order, or add your own.

## 4 STEP 4 Your daily routine: Next Action and Update

**Why this matters.** One list tells each person what to do today. After every call, one tap records it and sets what's next.

**Tip** Not today? On the card, click Tomorrow, In 2 Days or Next Week. The same step moves; nothing is lost.

### Next Action

The screenshot displays the NextIsWhat app interface. On the left is a dark sidebar with a menu. The main area shows a list of tasks under the heading 'PENDING — NEEDS YOU NOW 2'. A modal window is open for a task named 'Velquor Systems' by 'Arnav Kumbhoja'. The modal includes a 'Run demo' action, a 'WHY?' section with details about a deal, a 'LAST NOTE' section, and buttons for 'Call', 'WhatsApp', 'Done', and 'First touch'. At the bottom of the modal, there are options to reschedule: 'Not today? Tomorrow · In 2 Days · Next Week' and a link to 'Open the full record'. The background list shows other tasks like 'Brivolt Works', 'Arquenta House', and 'Corvessa Retail'.

**NextIsWhat**

THINK

- Today
- Signals
- Watch Out
- Not Moving

ACT

- Next Action**

MANAGE

- Leads 4
- Deals
- Companies
- Contacts
- Tracker

GROW

- Marketing
- Answers

PENDING — NEEDS YOU NOW 2

No

Yes

TICK

OV

TODAY

6 PM

6 PM

6 PM

9:59 PM

**Velquor Systems**

Arnav Kumbhoja

Run demo

**WHY?**

Due earlier today · ₹1.8L deal · stage Demo · no call, WhatsApp or email logged yet.

**LAST NOTE**

Deal added: Demo.

**Call** **WhatsApp** **Done** **First touch**

Not today? **Tomorrow** · In 2 Days · Next Week

[Open the full record →](#)

**Set one**

Negotiation

**Open**

Demo

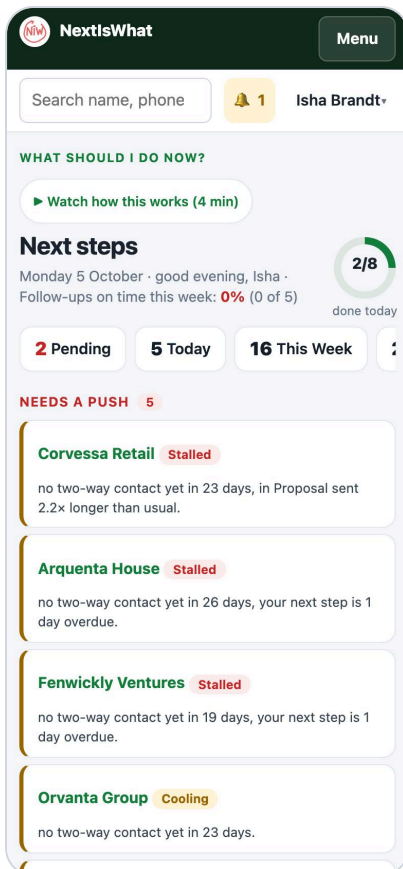
Negotiation

New

Demo

New

Proposal sent



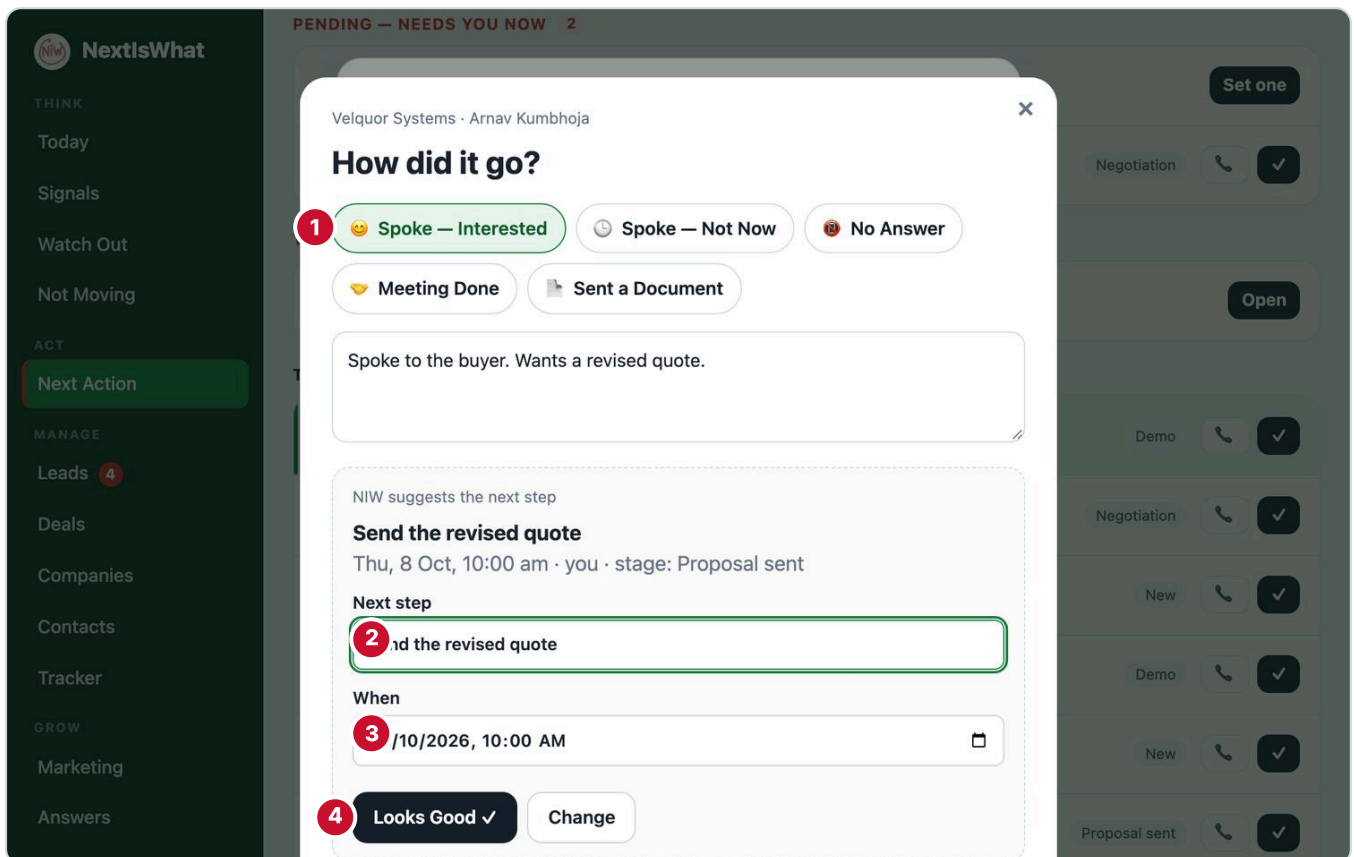
On a phone

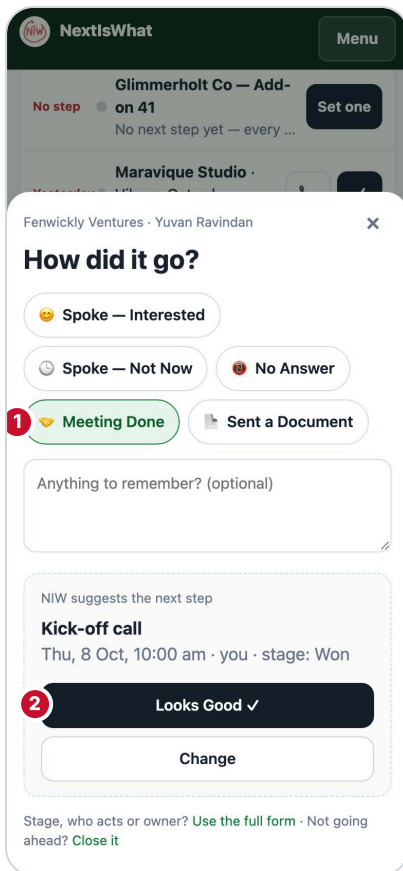
1 Click a row to open its card on the right.

2 When you've done it, click Done.

At the top, Pending, Today, This Week and Waiting on Others show how many steps are in each part of your list; click one to jump there. On a phone (left), tap the tick on a row instead.

## How did it go? What's next?

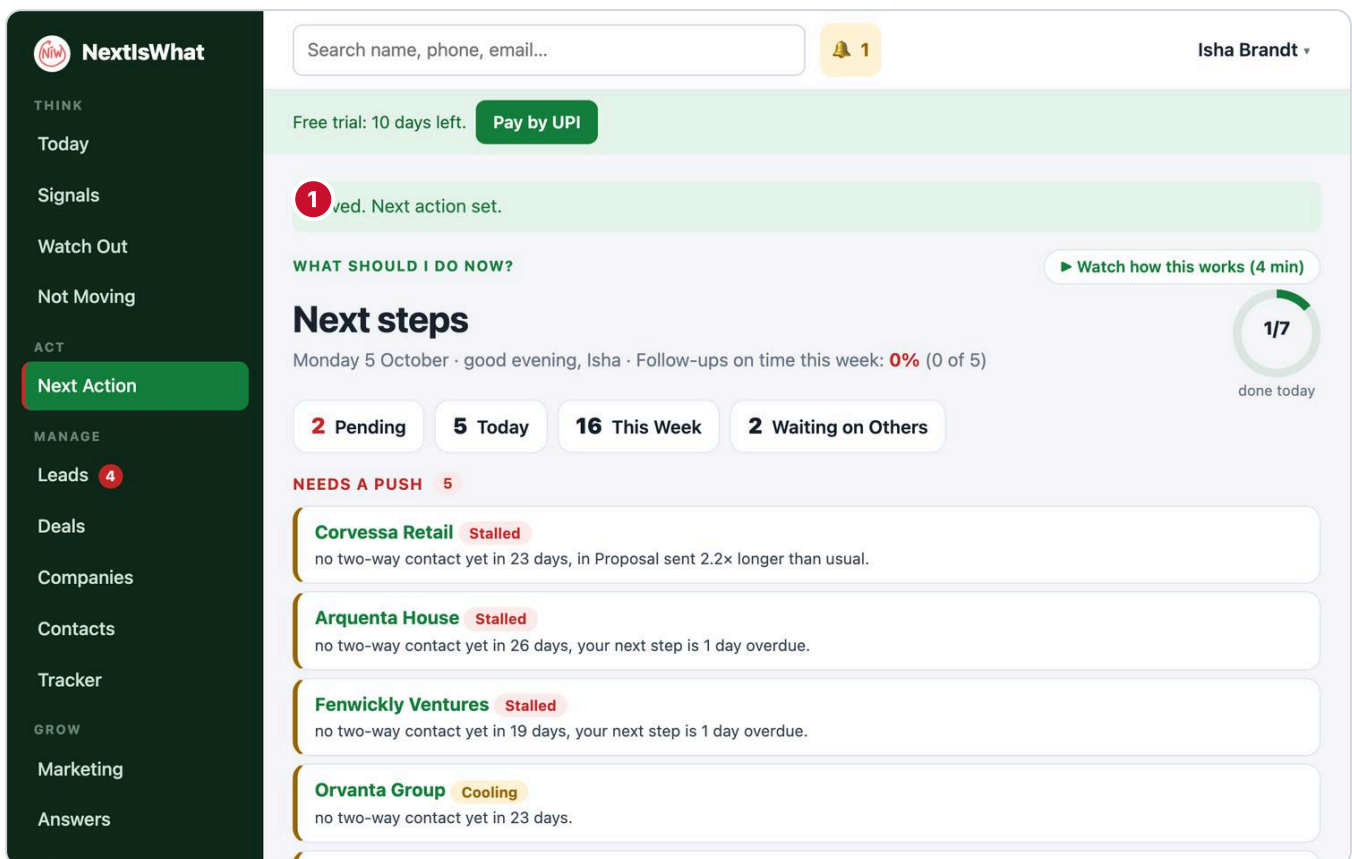




On a phone

- 1 Pick what happened.
- 2 NIW suggests the next step. Click Change to type your own.
- 3 Check the date and time it is due.
- 4 Click Looks Good.

## Saved



- 1 Saved. The old step is closed and the new one is on your list, on the right date.

## Waiting for someone else

 **NextIsWhat**

THINK

Today

Signals

Watch Out

Not Moving

ACT

Next Action

MANAGE

Leads 4

**Deals**

Companies

Contacts

Tracker

GROW

Marketing

Answers

New Qualified Demo Proposal sent **Negotiation** Won Lost

The pipeline stage follows the Baton stage automatically. Clicking a stage is a manager override and is logged in the timeline.

Never promise a delivery date before Operations confirms it.

**Next action** Overdue since 6:00 PM

Stage: Negotiation

**Pricing call**

Owner: Isha Brandt · due 5 Oct 2026, 6:00 PM

Done — what's next?

First touch

1 Change, reschedule or hand over

Stage

Negotiation

Deal moves to: Negotiation

Who acts?

2 Waiting for Legal

Type

Call

Next action

Pricing call

Owner

Isha Brandt (me)

Waiting for what?

e.g. Approval for 8% discount

3

**Contact**

**Yuvan Ravindan**

Business Head

+919000010333 Copy

Start Call Timer

WhatsApp Email

**Details**

|                     |                       |
|---------------------|-----------------------|
| Company             | Fenwickly Ventures    |
| Value               | ₹60,000               |
| Weighted            | ₹48,000               |
| Expected close      | —                     |
| In this stage since | 30 Sep 2026 (5 d ago) |
| Last activity       | 5 d ago               |
| Source              | —                     |
| Created             | 16 Sep 2026           |

Delete Deal

- 1 On the customer's page, open Change, reschedule or hand over.
- 2 Who acts? Choose Waiting for (for example Legal or the customer). The step stays yours, with a follow-up date.
- 3 To hand it to a colleague, choose them as the owner.

Getting Started with NextIsWhat

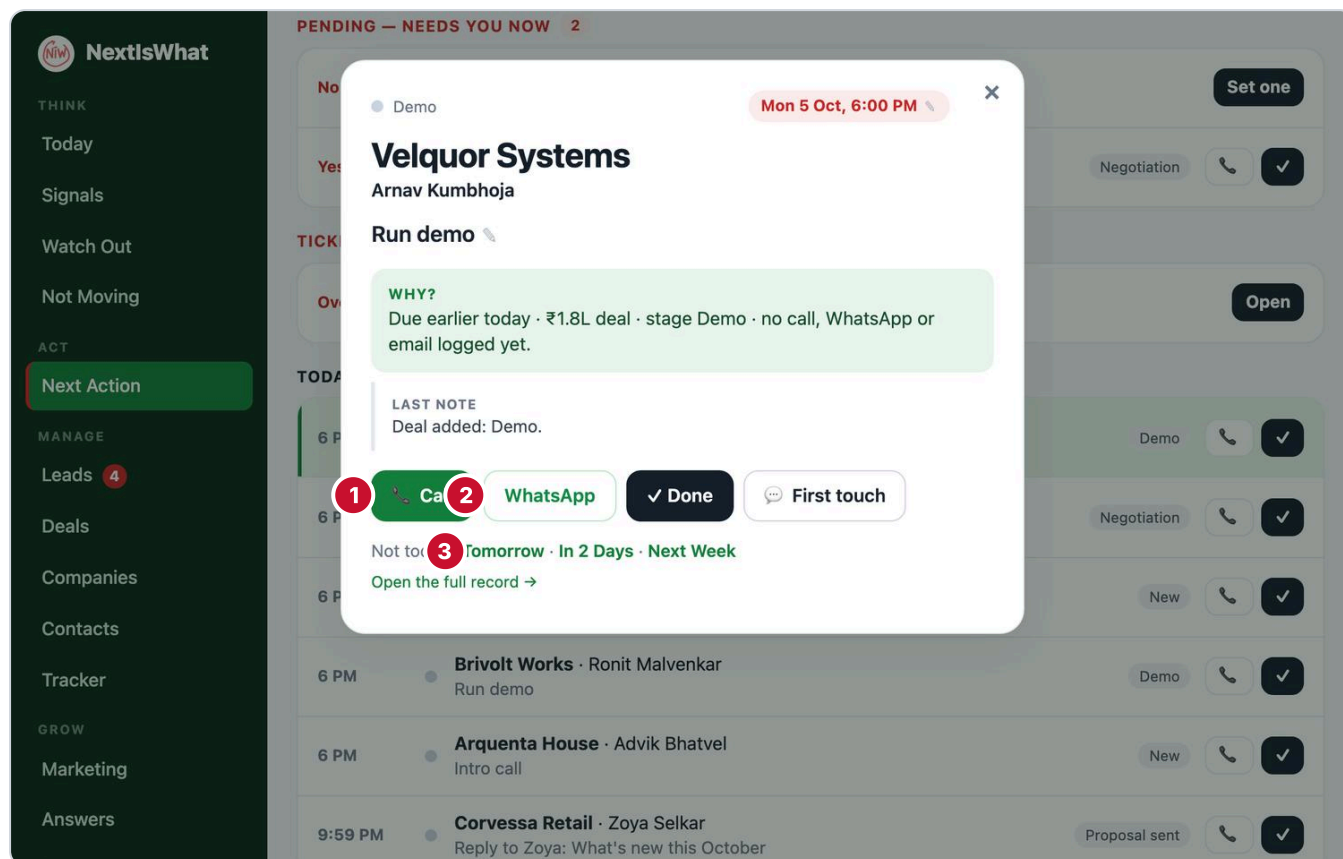
25

## 5 STEP 5 Call and WhatsApp from NIW

**Why this matters.** No copying numbers. Every call and message is one tap, and gets recorded.

**Tip** On a customer's page, the WhatsApp button also has ready messages, like a follow-up or a payment reminder.

On every card



- 1 Call: on a phone, your phone dials the customer. On a computer, you see the number with a Copy button and a call timer.
- 2 WhatsApp opens a chat with the customer's number filled in.
- 3 Not today? Move the step to tomorrow, in 2 days, or next week.

When you come back after a call on your phone, NIW asks how the call went, with the time you spoke already filled in.

## 6 STEP 6 Turn leads into deals

**Why this matters.** When a lead is ready to buy, it becomes a deal with a value, so you can see your pipeline.

**Tip** Use the Hot leads list on Leads to call the best leads first.

### A hot lead

The screenshot shows the NextIsWhat CRM interface. On the left is a dark sidebar with navigation options: THINK (Today, Signals, Watch Out, Not Moving), ACT (Next Action), MANAGE (Leads 4, Deals, Companies, Contacts, Tracker), and GROW (Marketing, Answers). The main area has a search bar, a notification bell with 1, and the user name 'Isha Brandt'. A green banner at the top indicates 'Free trial: 10 days left' and 'Pay by UPI'. The lead profile for 'Rohan Velankar' is shown, with details: 'Nimbrel Foods', 'Qualified', and 'Owner: Isha Brandt'. A red circle with the number 1 highlights the 'Convert to Deal' button. Below the profile, there are sections for 'Next action' (Stage: New, Tomorrow 6:00 PM, 'Qualify need and budget', 'Owner: Isha Brandt · due 6 Oct 2026, 6:00 PM', 'After this: Book demo', 'Done — what's next?', 'First touch', 'Change, reschedule or hand over') and 'Done? Log what happened and what's next' (What did you do? Call, WhatsApp, Email, Meeting, Note; How did the call go?). On the right, the 'Contact' section shows the phone number '+919000052001', email 'rohan.velankar@nimbrel.example', and other details. A red circle with the number 2 highlights the 'Hot - 75' status indicator.

- 1 Click Convert to Deal.
- 2 Why this lead is hot: NIW scores every lead out of 100 and shows the reasons.

## Convert

 **NextIsWhat**

THINK

Today

Signals

Watch Out

Not Moving

ACT

Next Action

MANAGE

**Leads 4**

Deals

Companies

Contacts

Tracker

GROW

Marketing

Answers

**Contact**

A new contact **Rohan Velankar** will be created with this lead's phone and email.

**Company**

Existing company

New company

No company

Existing company

New company name

Nimbrel Foods

Nimbrel Foods

**Deal**

Deal title \*

Value (₹)

Expected close date

Nimbrel Foods — deal

1 4.5L

04/11/2026

**Owner**

Isha Brandt

**Next action on the deal**

Stage

Who acts?

Qualified

Sales — the owner does it

Deal moves to: Qualified

Type

Next action

Call

Book demo

**When?**

1 Type the value, for example 4.5L.

2 Click Convert.

NIW creates the contact, the company and the deal, and carries over the source. The first next step is filled in for you.

## The deal

The screenshot displays the NextIsWhat CRM interface. On the left is a dark sidebar with navigation options: THINK (Today, Signals, Watch Out, Not Moving), ACT (Next Action), MANAGE (Leads 4, Deals, Companies, Contacts, Tracker), and GROW (Marketing, Answers). The main area has a top bar with a search field, a notification bell with '1', and the user name 'Isha Brandt'. Below this is a green banner for 'Free trial: 10 days left' and a 'Pay by UPI' button. A green notification bar states 'Lead converted. The deal is ready.' with a red '1'. A link 'Watch how this works (3 min)' is present. The main content shows a deal for 'Nimbrel Foods' with a value of ₹4,50,000, status 'Open', 25% qualified, and owner 'Isha Brandt'. An 'Edit' button is next to the deal name. Below the deal name are stage buttons: New, Qualified (selected), Demo, Proposal sent, Negotiation, Won, and Lost. A note explains that the pipeline stage follows the Baton stage automatically. The main action area shows a red '2' for 'Book demo' at '8 Oct, 10:00 AM', with details like 'Owner: Isha Brandt', 'due 8 Oct 2026, 10:00 AM', and 'After this: Run demo'. It includes a 'Done — what's next?' button and a 'First touch' button. To the right is a 'Contact' section for 'Rohan Velankar', Purchase Head, with phone number '+919000052001' and buttons for 'Copy', 'Start Call Timer', 'WhatsApp', and 'Email'. A 'Details' section at the bottom shows 'Company: Nimbrel Foods'.

- 1 Your deal is ready.
- 2 Its next step.
- 3 Share a plan with the buyer (Step 7).

## Deals

**NextIsWhat**

Search name, phone, email... 1 Isha Brandt

Free trial: 10 days left. **Pay by UPI**

WHERE ARE MY OPPORTUNITIES? [▶ Watch how this works \(3 min\)](#)

**Deals** 1 **+ New Deal**

36 open · ₹92.1L pipeline · ₹37.9L weighted

**Board** List

Deal, company or contact Everyone Filter

| New                                                                                                               | Qualified                                                                                                  | Demo                                                                                                             | Proposed                                                          |
|-------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------|
| <b>Pellucar Networks — Pilot 28</b><br>Cooling<br>₹4,80,000<br>Pellucar Networks<br>Dev Marlowe<br>7 Oct, 6:00 PM | <b>Zentrova Labs — Rollout 1</b><br>Cooling<br>₹4,80,000<br>Zentrova Labs<br>Tara Velkin<br>8 Oct, 6:00 PM | <b>Glimmerholt Co — Team plan 30</b><br>Cooling<br>₹4,80,000<br>Glimmerholt Co<br>Tara Velkin<br>15 Oct, 6:00 PM | <b>Orva 18</b><br>Cooling<br>₹4,80,000<br>Orvan<br>Tara V<br>Over |
| <b>Zentrova Labs — Renewal 16</b><br>Cooling<br>₹2,40,000<br>Zentrova Labs                                        | <b>Maravique Studio — Renewal 21</b><br>Stalled<br>₹4,80,000<br>Maravique Studio                           | <b>Dunmarrow &amp; Co — Rollout 9</b><br>Cooling<br>₹3,60,000                                                    | <b>Glimmerholt Co — Expansion</b><br>Cooling<br>₹3,60,000         |

**1** All deals by stage, with values. Click + New Deal to add one directly.

The stage moves when you finish steps, so your board stays true without extra work.

## Game Plan (managers)

 **NextIsWhat**

THINK

Today

Signals

Watch Out

Not Moving

ACT

Next Action

MANAGE

Leads 4

Deals

Companies

Contacts

Tracker

GROW

Marketing

Answers

 **1**

Isha Brandt ▾

Free trial: 10 days left. [Pay by UPI](#)

Added 1 game plan. Not added (your Baton Map has no stage called Verbal yes).

[▶ Watch how this works \(2 min\)](#)

**2**

[+ New Game Plan](#)

### Game Plan

Your moves for every deal stage

**1**

| Game Plan                   | Stage         | Steps | On  |                                             |
|-----------------------------|---------------|-------|-----|---------------------------------------------|
| <b>Proposal to decision</b> | Proposal sent | 3     | Yes | <a href="#">Copy</a> <a href="#">Remove</a> |

#### Template results

Shows here once reps send messages from game plan steps (the WhatsApp and Email buttons on a deal's shared plan).

Email replies are counted automatically when they come into NIW. WhatsApp replies count only when the rep logs them ("They sent it" on WhatsApp), so the real number can be higher.

#### Starter packs

Ready-made game plans for common ways of selling. Adding a pack adds its game plans for the stages your Baton Map already has (same stage name).

- 1** A game plan lists the steps for a deal stage, for you and for the buyer.
- 2** Start from a ready pack for how you sell, or click + New Game Plan.

# 7

STEP 7

## Share a Deal Plan with your buyer

**Why this matters.** Buyers forget their own steps. A shared plan keeps both sides moving, without a login.

**Tip** Open the deal and click Share Plan to create the link. Edit the steps and dates any time.

### Shared plan

NextIsWhat

THINK

Today

Signals

Watch Out

Not Moving

ACT

Next Action

MANAGE

Leads 4

**Deals**

Companies

Contacts

Tracker

GROW

Marketing

Answers

1

Isha Brandt ▾

Free trial: 10 days left. [Pay by UPI](#)

Your shared plan is ready. Send the link to the buyer on WhatsApp or email.

[▶ Watch how this works \(3 min\)](#)

### Shared plan

Nimbrel Foods — deal

**The buyer's link**

1

Copy Link

2

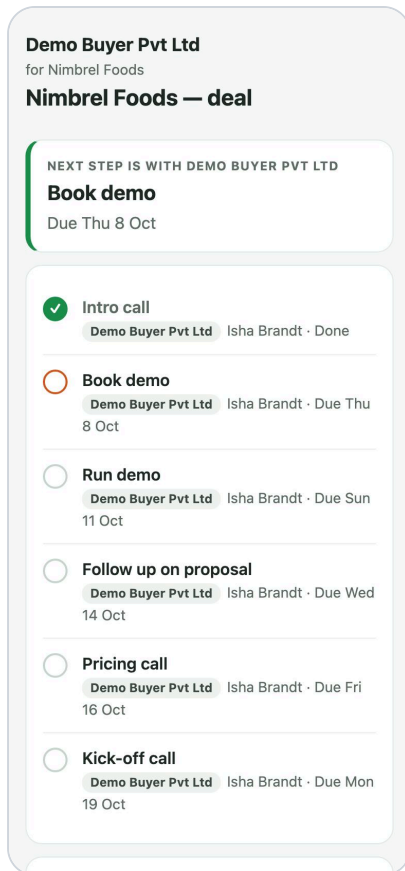
[Send on WhatsApp](#)
[Open as the buyer](#)

[Revoke Link](#)

**Steps**

Side: who acts. Visible: the buyer sees the step. Hidden steps stay internal.

| Step                       | Side | Owner       | Due        | Visible to buyer                            | Status | Message |
|----------------------------|------|-------------|------------|---------------------------------------------|--------|---------|
| <a href="#">Intro call</a> | Us ▾ | Isha Brandt | dd/mm/yyyy | <input checked="" type="checkbox"/> Visible | ✓ Done | —       |



On a phone

- 1 The buyer's link. Copy it, or
- 2 send it on WhatsApp.

The phone picture shows what your buyer sees. They can mark their steps done, ask for a new date, add a file or leave a comment. They never see the deal value or your notes.

# 8

STEP 8

## Keep your Tracker up to date

**Why this matters.** The Tracker is your whole pipeline in one table, just like your old spreadsheet, but it updates your lists for you.

**Tip** Use Export to Excel on the Tracker any time you need a copy for a meeting.

Click a cell

NextIsWhat

Search name, phone, email...

Free trial: 10 days left. Pay by UPI

WHAT IS THE DETAILED STATUS?

Tracker

53 open accounts · 1 with no next action · click any cell to change it

Export to Excel Spreadsheet View

All 53 Sales Manager 0 Management 0 Pre-sales 0 Finance 0 Legal 3 Operations/Delivery 0

Customer Support 0 Customer 2

Search company or contact Everyone Any due date Waiting for: anyone

Filter

|      | Company           | Contact       | Category | Stage         | Last update                                  | Next action              | Over   |
|------|-------------------|---------------|----------|---------------|----------------------------------------------|--------------------------|--------|
| Edit | Glimmerholt Co    | Mira Ganorkar | —        |               | Add an update                                | No next action — set one | Ist Br |
| Edit | Pellucar Networks | Ira Junekar   | —        | Negotiation   | Deal added: Negotiation. 2 Oct · Tara Velkin | Pricing call             | Ta Ve  |
| Edit | Orvanta Group     | Meher Sorabh  | —        | Proposal sent | Deal added: Proposal sent.                   | Follow up on proposal    | Ta Ve  |

- 1 Click a cell, for example the stage, and choose a new value.
- 2 The next action for this row.

## What happened to the previous one?

The screenshot shows the NextIsWhat Tracker interface. A modal dialog titled "What happened to the previous one?" is open, displaying the text "Pricing call" - was due Sat 3 Oct. The dialog has three buttons: "Done", "Rescheduled", and "Dropped". Below these is a text input field labeled "Optional one-line note". At the bottom of the dialog are "Save" and "Cancel" buttons. Red circles with numbers 1 and 2 point to the "Done" button and the "Save" button respectively. The background interface includes a sidebar with navigation options like "THINK", "Today", "Signals", "Watch Out", "Not Moving", "ACT", "Next Action", "MANAGE", "Leads", "Deals", "Companies", "Contacts", "Tracker", "GROW", "Marketing", and "Answers". The main area shows a table of accounts with columns for Company, Contact, Category, Stage, Last update, Next action, and Owner. The table lists accounts like Glimmerholt Co, Pellucar Networks, and Orvanta Group.

- 1 Choose Done, Rescheduled or Dropped.
- 2 Click Save.

## Updated

 **NextIsWhat**

THINK

Today

Signals

Watch Out

Not Moving

ACT

Next Action

MANAGE

Leads 4

Deals

Companies

Contacts

Tracker

GROW

Marketing

Answers

 1

Isha Brandt ▾

Free trial: 10 days left. [Pay by UPI](#)

WHAT IS THE DETAILED STATUS?

[▶ Watch how this works \(4 min\)](#)

Tracker

[↓ Export to Excel](#) [Spreadsheet View](#)

53 open accounts · 1 with no next action · click any cell to change it

All 53

Sales Manager 0

Management 0

Pre-sales 0

Finance 0

Legal 3

Operations/Delivery 0

Customer Support 0

Customer 2

Everyone ▾

Any due date ▾

Waiting for: anyone ▾

Filter

|                                                                                        | Company             | Contact       | Category | Stage | Last update                                                                              | Next action                  | Owner       | Due date          |
|----------------------------------------------------------------------------------------|---------------------|---------------|----------|-------|------------------------------------------------------------------------------------------|------------------------------|-------------|-------------------|
|  Edit | Glimmerholt Co ↗    | Mira Ganorkar | —        |       | Add an update                                                                            | No next action — set one     | Isha Brandt | No date           |
|  Edit | Pellucar Networks ↗ | Ira Junekar   | —        | Won   | Done: Pricing call<br>5 Oct · Isha Brandt                                                | <span>1</span> Kick-off call | Tara Velkin | Thu 8 Oct         |
|  Edit | Orvanta Group ↗     |               |          |       | Saved – Next Action updated <a href="#">Undo</a><br>ded: Proposal<br>4 Oct · Tara Velkin | Follow up on proposal        | Tara Velkin | Sat 3 Oct<br>late |

1 The next action updates by itself, and the same change shows on Next Action.

## STEP 9

# 9 Your morning check: Today, Signals, Watch Out, Not Moving

**Why this matters.** Four screens tell you where to look before the day starts.

**Tip** Days waiting turn amber after 2 days and red after 5. Start your morning with the red ones.

Today (managers and owner)

The screenshot shows the NextIsWhat dashboard interface. On the left is a dark sidebar with navigation links: THINK (Today, Signals, Watch Out, Not Moving), ACT (Next Action), MANAGE (Leads 4, Deals, Companies, Contacts, Tracker), and GROW (Marketing, Answers). The main content area has a top bar with a search bar, a notification bell with '1', and the user name 'Isha Brandt'. Below this is a green banner for a 'Free trial: 10 days left' with a 'Pay by UPI' button. The main section is titled 'WHAT IS HAPPENING IN MY BUSINESS?' and 'Today', showing '14 of your 52 accounts have gone cold and 5 are stuck with your own team. 5 are paying customers.' It includes a progress bar and a summary for Monday 5 October. A highlighted card for 'Brivolt Works' is marked with a red '1' and labeled 'Cold', showing it's been quiet for 32 days and suggesting to 'Book demo'. At the bottom, there's a section 'ALSO WORTH A LOOK TODAY' featuring 'Orvanta Group'.

**1** Start here: the one account that matters most today, and what to do about it.

Below it, every account is Moving, Cooling, Cold or Stuck, so you see at a glance which ones need you.

## Signals

 **NextIsWhat**

THINK

Today

**Signals**

Watch Out

Not Moving

ACT

Next Action

MANAGE

Leads 4

Deals

Companies

Contacts

Tracker

GROW

Marketing

Answers

 1

Isha Brandt ▾

Free trial: 10 days left. [Pay by UPI](#)

WHAT DID NIW NOTICE?

[▶ Watch how this works \(4 min\)](#)

### Signals

uses only your CRM notes

What NIW noticed in your 52 open accounts, and what to do about it

1

**OUR BRIEF**

1. Start with Maravique Studio: Pricing call.
2. Your team and customers are holding 5 batons; most with Legal (3).
3. 3 accounts have gone quiet; the longest is Brivolt Works (32 days).

WHAT NIW NOTICED 5 things

 **GONE QUIET**  
**3 accounts have gone quiet.**  
**WHY IT MATTERS** Open accounts with no update for 21+ days are the ones that slip away.  
**WHAT TO DO** **Plan a call with each of them this week.**  
**Brivolt Works**  
No update for 32 days · Qualified · next: Book demo  
[Plan a call →](#)

 **WAITING ON OTHERS**  
**5 accounts are waiting on another team.**  
**WHY IT MATTERS** Nothing moves until they reply, and you still hold the baton.  
**WHAT TO DO** **Chase them today.**  
**Orvanta Group**  
Customer: Follow up on proposal · last update 10 days ago · follow up 8 Oct  
[Chased Customer — remind me in 2 days](#)

1 Your brief: the first things to do today. Below it, accounts that went quiet, are waiting on others, or are ready for more business.

Getting Started with NextIsWhat

38

## Watch Out (managers)

 **NextIsWhat**

THINK

Today

Signals

**Watch Out**

Not Moving

ACT

Next Action

MANAGE

Leads 4

Deals

Companies

Contacts

Tracker

GROW

Marketing

Answers

 **1**

Isha Brandt ▾

Free trial: 10 days left. [Pay by UPI](#)

**WHAT NEEDS MY INTERVENTION?** [▶ Watch how this works \(4 min\)](#)

### Watch Out

Things that need your eye today · 17 things need your attention · 16 deals worth ₹45.3L

**Tessaline Trading — Renewal 22**  
No activity for 12 d · ₹4.8L

Dev Marlowe

**Brivolt Works — Rollout 19**  
No activity for 31 d · ₹4.8L

Dev Marlowe

**Maravique Studio — Renewal 21**  
Follow-up overdue 2 d · No activity for 12 d · ₹4.8L

Tara Velkin

**Orvanta Group — Team plan 18**  
Follow-up overdue 2 d · ₹4.8L

Tara Velkin

**Maravique Studio — Team plan 6**  
Follow-up overdue 1 d · ₹3.6L

Isha Brandt

**Orvanta Group — Team plan 3**  
No activity for 9 d · ₹3.6L

Isha Brandt

- 1 Deals needing attention, with the owner and the reason. Below: new leads nobody has called, and your team at a glance.

## Not Moving

 **NextIsWhat**

THINK

Today

Signals

Watch Out

**Not Moving**

ACT

Next Action

MANAGE

Leads 4

Deals

Companies

Contacts

Tracker

GROW

Marketing

Answers

 **1**

Isha Brandt ▾

Free trial: 10 days left. [Pay by UPI](#)

**WHAT IS WAITING, AND ON WHOM?** [▶ Watch how this works \(4 min\)](#)

### Not Moving

Deals waiting on your team or the buyer, and for how long · 37 waiting on us · 2 waiting on the buyer

#### Waiting on us (37)

| Deal                                                           | Step                     | Owner       | Waiting        | Last plan open |
|----------------------------------------------------------------|--------------------------|-------------|----------------|----------------|
| <b>Brivolt Works</b><br>Brivolt Works — Rollout 19             | Book demo<br>due 10 Oct  | Dev Marlowe | <b>31 days</b> | —              |
| <b>Quillmere Co</b><br>Quillmere Co — Team plan 2              | Intro call<br>due 8 Oct  | Dev Marlowe | <b>26 days</b> | —              |
| <b>Kestrolan Partners</b><br>Kestrolan Partners — Expansion 20 | Intro call<br>due 12 Oct | Isha Brandt | <b>24 days</b> | —              |
| <b>Dunmarrow &amp; Co</b><br>Dunmarrow & Co — Rollout 9        | Run demo<br>due 7 Oct    | Isha Brandt | <b>12 days</b> | —              |
| <b>Zentrova Labs</b><br>Zentrova Labs — Renewal 16             | Intro call<br>due 7 Oct  | Dev Marlowe | <b>12 days</b> | —              |
| <b>Maravique Studio</b>                                        | Book demo                | Tara Velkin | <b>12 days</b> | —              |

**1** Steps waiting on the buyer. Click Nudge on WhatsApp to send a polite reminder.

## STEP 10

# 10 Marketing: audiences, WhatsApp plays and forms

**Why this matters.** Reach the right people from the same place your sales team works.

**Tip** People who unsubscribed are always left out of every audience.

## Marketing → Audiences

Pick who it is for. The count updates when you press "Show who matches".

**NextIsWhat**

THINK

Today

Signals

Watch Out

Not Moving

ACT

Next Action

MANAGE

Leads **4**

Deals

Companies

Contacts

Tracker

GROW

**Marketing**

Answers

**People**

Contacts and leads ✓

**Industry contains**

e.g. QSR, Banking

**City contains**

e.g. Bengaluru

**Stage**

1 Proposal sent ✓

**Owner**

Anyone ✓

**Tag**

e.g. webinar-2026

**Engagement**

Anyone ✓

2 Show Who Matches

**5 people match**

People without an email address, are always left out.

**Arnav Kumbhoja** arnav.kumbhoja@velquor.example · Velquor Systems

**Kabir Daruwind** kabir.daruwind@quillmere.example · Quillmere Co

**Meher Sorabh** meher.sorabh@orvanta.example · Orvanta Group

**Mira Ganorkar** mira.ganorkar@glimmerholt.example · Glimmerholt Co

**Zoya Selkar** zoya.selkar@corvessa.example · Corvessa Retail

**Name**

3 Proposal stage

**Kind**

Segment — whoever matche... ✓

- 1 Filter your contacts and leads, for example by stage.
- 2 Click Show Who Matches.
- 3 Name the audience.
- 4 Click Save Audience.

## Templates → Marketing Plays

NextIsWhat

Search name, phone, email...

Free trial: 10 days left. Pay by UPI

What do you need to say?

Write My Own Play Today's Sends Settings

Moments Saved Emails

Sales Moments Marketing Plays

NURTURE

Wake up old leads no sends yet

No activity 90+ days · 3 steps

New customer story no sends yet

Open deals, same industry

OCCASIONS

Festival greeting no sends yet

Greeting only, no sales ask

Event / webinar invite no sends yet

Invite · reminder · thank-you

GROWTH

Ask for a referral no sends yet

Wake up old leads

No activity 90+ days · 3 steps · starter Play

No sends yet Deals created: 0

Tone Warm Formal Short

Edit Play Copy and Edit

Goes to 0 people

leads with no activity for 90+ days · that you may see · 0 by WhatsApp · 0 by email (agreed to marketing email)

See the List Change Who

1 · HELLO AGAIN

Day 0 · only if no reply

2 · ONE USEFUL TIP

Day 5 · only if no reply

3 · KEEP YOU ON THE LIST?

Day 12 · only if no reply

WHATSAPP

- 1 Pick a ready play, like Wake up old leads, a festival greeting or an event invite.
- 2 Choose who it goes to, fill in the blanks once, and start it.

WhatsApp messages from a play wait for you in Today's Sends: one tap each. A reply stops the play for that person and sets a next step for sales.

**NextIsWhat**

1

Isha Brandt ▾

Free trial: 10 days left. **Pay by UPI**

Home Audiences **Campaigns** Calendar Reports

### New web form

**Form name (only you see this)**  

1

**Campaign**  
 ▾

**Lead source**  
 ▾

**New leads go to**  

2

 ▾

**Questions on the form**

| Question  | Ask it | Must answer |
|-----------|--------|-------------|
| Your name | Always | Always      |

Save the form to get the code for your website.

- 1 Name your enquiry form.
- 2 Choose who gets the leads, or share them out in turn.

Copy the code into your website, or share the link. Every enquiry becomes a lead with a call due within one hour.

# 11

STEP 11

## Answers and Reports

**Why this matters.** The numbers managers ask for every week, without building a report.

**Tip** Every answer has Export to Excel.

### Answers (managers and owner)

**NextIsWhat**

Search name, phone, email...

Free trial: 10 days left. [Pay by UPI](#)

**WHAT DO I NEED TO KNOW THIS WEEK?** [▶ Watch how this works \(2 min\)](#)

**Answers** [Monday Digest](#)

Answers to the questions managers ask most · 5 Oct – 5 Oct 2026

Everyone 05/10/2026 05/10/2026 Show

**1. What's not moving, and since when?**

**18** waiting on us • **2** waiting on the buyer (2+ days;  
19 newer steps not counted)

Brivolt Works — Book demo · us · since 31 days

Quillmere Co — Intro call · us · since 26 days

Kestrolan Partners — Intro call · us · since 24 days

Dunmarrow & Co — Run demo · us · since 12 days

Zentrova Labs — Intro call · us · since 12 days

[Export to Excel](#) [CSV](#)

**2. Promise-kept rate**

**0%** 0 of 9 next actions done by their due time

| Rep         | Kept     |
|-------------|----------|
| Dev Marlowe | 0% (0/1) |
| Isha Brandt | 0% (0/5) |
| Tara Velkin | 0% (0/3) |

▶ By buyer company

[Export to Excel](#) [CSV](#)

- 1 Six answers: what's not moving, promises kept, deals moved, momentum, where new deals came from, and overdue steps by person.
- 2 Monday Digest puts it in a short message you can send on WhatsApp.

## Reports

**NextIsWhat**

THINK

Today

Signals

Watch Out

Not Moving

ACT

Next Action

MANAGE

Leads **4**

Deals

Companies

Contacts

Tracker

GROW

Marketing

Answers

Search name, phone, email...

Free trial: 10 days left. **Pay by UPI**

**WHAT HAPPENED?**

**Reports**

How the business is moving, in your standard numbers · whole company

This Week 30 Days **1** Quarter 12 Months

**2** WHAT CHANGED THIS WEEK

**14** new leads **3** deals moved to a new stage **5** won **2** accounts went cold

**33%** of follow-ups done on time

Active accounts  
**52**  
52 No category

Next steps done on time  
**33%**  
last 90 days

Overdue now  
**11**  
Dunmarrow & Co, Arquenta House, Zentrova Labs

Waiting on others  
**5**  
longest: Customer — Orvanta Group

Won  
**₹11.7L**  
5 deals · last 90 days

Win rate  
**71%**  
2 lost · ₹5.7L

- 1** Pick the period: this week, 30 days, a quarter or 12 months.
- 2** What changed, and every other report below it.

STEP 12

# 12 Save time: Templates, Game Plan, Activity Log

**Why this matters.** Write a message once, use it every day.

**Tip** Game Plan is in Step 6. Moments also tell you what to do if the customer replies, or goes quiet.

Templates → Saved Emails → + New Template

**1** Give it a name, a subject and your words, attach a brochure if you like, and save.

## Templates → Moments

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Search name, phone, email...

1

Isha Brandt

Free trial: 10 days left. Pay by UPI

Watch how this works (2 min)

### Templates

What do you need to say?

Write My Own Suggest for This Deal Settings

Moments Saved Emails

For: **nobody picked yet** — pick a lead or deal, and NIW fills the blanks from it.

Lead, deal or company

e.g. Sharma

Find

Sales Moments Marketing Plays

START

**1** First touch no sends yet

New lead, never spoken

Tried calling, no answer no sends yet

Send right after the call

### First touch

Stage: New lead · New lead, never spoken · starter Moment

No sends yet Deals moved: 0 of 0

Tone Warm Formal Short

Edit Copy and Edit

**2** WHATSAPP

EMAIL 40 words

IF YOU CALL

- 1 Ready messages for each moment in a sale, like a first touch or after a meeting.
- 2 Fill in the blanks and send it on WhatsApp in one tap.

Activity Log

NextIsWhat

THINK

Today

Signals

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Not Moving

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Next Action

MANAGE

Leads 4

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Answers

1

Isha Brandt ▾

Free trial: 10 days left. [Pay by UPI](#)

WHAT HAPPENED, ONE BY ONE?[▶ Watch how this works \(2 min\)](#)

### Activity Log

Every call, message, email and note, in one place · 39 logged in the last 7 days

1  
Calls

0  
WhatsApp

1  
Emails

0  
Meetings

37  
Notes

1 Last 7 days ▾

All types ▾

Everyone ▾

Filter

Note Pellucar Networks — Team plan 13 Isha Brandt · 5 Oct 2026, 9:01 PM

Pipeline stage: Negotiation → Won (follows Baton stage "Won")

Note Pellucar Networks — Team plan 13 Isha Brandt · 5 Oct 2026, 9:01 PM

Done: Pricing call

Note Nimbrel Foods — deal Isha Brandt · 5 Oct 2026, 9:00 PM

1 Every call, WhatsApp, email, meeting and note, one by one. Filter by period, type and person.

Getting Started with NextIsWhat

48

## 13 STEP 13 When your trial ends

**Why this matters.** No surprises: you always see how many days are left.

**Tip** Pay before the trial ends and your team never stops.

### Two days left

The screenshot shows the NextIsWhat dashboard. At the top, a green banner indicates 'Free trial: 2 days left' with a 'Pay by UPI' button. A red circle with the number 1 points to this banner. The sidebar on the left has sections: THINK (Today, Signals, Watch Out, Not Moving), ACT (Next Action), MANAGE (Leads 4, Deals, Companies, Contacts, Tracker), and GROW (Marketing, Answers). The main content area has a search bar, a user profile 'Isha Brandt', and a 'WHAT SHOULD I DO NOW?' section. Below this is a 'Next steps' section showing 'Monday 5 October · good evening, Isha · Follow-ups on time this week: 0% (0 of 5)'. A progress bar shows '2/8 done today'. Below the progress bar are four buttons: '2 Pending', '5 Today', '16 This Week', and '2 Waiting on Others'. A 'NEEDS A PUSH 5' section lists five leads: Corvessa Retail (Stalled), Arquenta House (Stalled), Fenwickly Ventures (Stalled), Orvanta Group (Cooling), and Maravique Studio (Cooling). Each lead entry includes a brief description of the contact status.

1 The bar counts down, with a Pay by UPI button.

## Trial ended

The screenshot shows the NextIsWhat dashboard interface. On the left is a dark green sidebar with navigation links: THINK (Today, Signals, Watch Out, Not Moving), ACT (Next Action), MANAGE (Leads 4, Deals, Companies, Contacts, Tracker), and GROW (Marketing, Answers). The main content area has a top header with a search bar, a notification bell with '1', and the user name 'Isha Brandt'. A yellow banner at the top states: '1 Our free trial has ended, so your account is read-only. You can view and [export your data](#), but not add or change anything. To continue: [Pay by UPI](#).' Below this, a section titled 'WHAT SHOULD I DO NOW?' includes a 'Watch how this works (4 min)' link and a progress indicator '2/8 done today'. The 'Next steps' section shows 'Monday 5 October · good evening, Isha · Follow-ups on time this week: 0% (0 of 5)' and a summary: '2 Pending, 5 Today, 16 This Week, 2 Waiting on Others'. A 'NEEDS A PUSH 5' section lists five leads: Corvessa Retail (Stalled), Arquenta House (Stalled), Fenwickly Ventures (Stalled), Orvanta Group (Cooling), and Maravique Studio (Cooling), each with a description of contact status and next steps.

**NextIsWhat**

Search name, phone, email...

1

Isha Brandt

1 Our free trial has ended, so your account is read-only. You can view and [export your data](#), but not add or change anything. To continue: [Pay by UPI](#).

WHAT SHOULD I DO NOW?

▶ Watch how this works (4 min)

2/8  
done today

**Next steps**

Monday 5 October · good evening, Isha · Follow-ups on time this week: 0% (0 of 5)

2 Pending 5 Today 16 This Week 2 Waiting on Others

**NEEDS A PUSH 5**

- Corvessa Retail** Stalled  
no two-way contact yet in 23 days, in Proposal sent 2.2x longer than usual.
- Arquenta House** Stalled  
no two-way contact yet in 26 days, your next step is 1 day overdue.
- Fenwickly Ventures** Stalled  
no two-way contact yet in 19 days, your next step is 1 day overdue.
- Orvanta Group** Cooling  
no two-way contact yet in 23 days.
- Maravique Studio** Cooling  
no two-way contact yet in 16 days, your next step is 2 days overdue.

1 After 14 days without payment, your account becomes view-only.

Everyone can still log in, see everything and export the data. Buttons that add or change things are hidden until you pay.

## View-only

 **NextIsWhat**

THINK

Today

Signals

Watch Out

Not Moving

ACT

Next Action

MANAGE

**Leads** 4

Deals

Companies

Contacts

Tracker

GROW

Marketing

Answers

 1

Isha Brandt ▾

1

our free trial has ended, so your account is read-only. You can view and [export your data](#), but not add or change anything. To continue: [Pay by UPI](#).

WHO ARE MY PROSPECTS?

[▶ Watch how this works \(4 min\)](#)

**Leads**

13 found

Hot leads

Nurture list

Not called in 24 h

New

Open leads ▾

Everyone ▾

All sources ▾

All campaigns ▾

Any intent ▾

Filter

| Lead                                          | Priority | Phone         | Status | Intent    | Source / campaign | Owner       | Next action       |
|-----------------------------------------------|----------|---------------|--------|-----------|-------------------|-------------|-------------------|
| <b>Kiran Demo</b><br>Demo Buyer<br>Twelve Ltd | —        | +919000071012 | New    | Warm - 40 |                   | Isha Brandt | 7 Oct, 10:00 AM   |
| <b>Anil Demo</b><br>Demo Buyer Two<br>Ltd     | —        | +919000071001 | New    | Warm - 65 | Website           | Tara Velkin | Tomorrow 10:00 AM |

1 The banner explains it, with Pay by UPI. Leads, deals and contacts are still there to read.

# 14

STEP 14

## Pay by UPI and keep going

**Why this matters.** One plan, everything included. You pay by UPI; no card needed.

**Tip** Founding price: ₹999 per user per month, locked for as long as you stay. Standard price: ₹1,250 per user per month.

Settings → Plan and Payment (or Pay by UPI in the bar)

**NextIsWhat**

Search name, phone, email...

Free trial: 2 days left. [Pay by UPI](#)

[Watch how this works \(4 min\)](#)

### Settings

Company **Plan and Payment** Team Members Departments Baton Map Pipeline Stages Catego

**1** **Pay by UPI**

Your free trial ends on **7 Oct 2026**. Pay any time; your paid period starts when we confirm the payment.

**AMOUNT PER MONTH**

**₹4,995**

5 users × ₹999

Founding — locked

| Months | Amount  |
|--------|---------|
| 1      | ₹4,995  |
| 3      | ₹14,985 |
| 6      | ₹29,970 |
| 12     | ₹59,940 |

**2**

Scan with any UPI app (Google Pay, PhonePe, Paytm or your bank's app). Paid to

**Invoices**

Your invoices appear here after your first payment is confirmed.

Invoices use your company name and billing address from **Company** at the time of payment.

**Marketing emails**

0 of 1,000 emails used this month · 0 of 1,000 today (daily cap)

- 1 What you pay each month: the number of users in your plan × the price per user.
- 2 Scan the QR code inside NIW with any UPI app, like Google Pay, PhonePe or Paytm.

Write your company ID (shown under the amount) in the UPI payment note, so we know the payment is yours. The QR code is blurred in this guide: always scan it inside NIW.

## I have paid

 **NextIsWhat**

THINK

Today

Signals

Watch Out

Not Moving

ACT

Next Action

MANAGE

Leads 4

Deals

Companies

Contacts

Tracker

GROW

Marketing

Answers

12 ₹59,940

Paytm or your bank's app). Paid to ; your UPI app shows the account name

WRITE THIS IN THE UPI PAYMENT NOTE

**NIW1103**

Your company ID, so we know the payment is yours.

Paying from a computer? UPI ID

Copy

**I have paid**

Tell us the payment details from your UPI app. We check the bank and confirm by email.

Amount paid (₹)

1 4995

Date paid

05/10/2026

UPI reference number (12 digits, often called UTR)

2 3456789012

Note (optional)

3 Send Payment Details

- 1 The amount is filled in.
- 2 Type the 12-digit UPI reference number (UTR) from your UPI app.
- 3 Click Send Payment Details.

Payment details sent

NextIsWhat

THINK

Today

Signals

Watch Out

Not Moving

ACT

Next Action

MANAGE

Leads 4

Deals

Companies

Contacts

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Marketing

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1

Isha Brandt ▾

Free trial: 2 days left.

Pay by UPI

1 Thank you. We will check the bank and confirm by email, usually the same working day. Your account opens again as soon as the payment is confirmed.

▶ Watch how this works (4 min)

Settings

Company

Plan and Payment

Team Members

Departments

Baton Map

Pipeline Stages

Catego

Pay by UPI

Your free trial ends on 7 Oct 2026. Pay any time; your paid period starts when we confirm the payment.

AMOUNT PER MONTH

₹4,995

5 users × ₹999

Founding — locked

| Months | Amount  |
|--------|---------|
| 1      | ₹4,995  |
| 3      | ₹14,985 |

Invoices

Your invoices appear here after your first payment is confirmed.

Invoices use your company name and billing address from Company at the time of payment.

Marketing emails

0 of 1,000 emails used this month · 0 of 1,000 today (daily cap)

1 We check the bank and confirm by email, usually the same working day.

THINK

Today

Signals

Watch Out

Not Moving

ACT

Next Action

MANAGE

Leads 4

Deals

Companies

Contacts

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GROW

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Search name, phone, email...

1

Isha Brandt ▾

Settings

Company

Plan and Payment

Team Members

Departments

Baton Map

Pipeline Stages

Catego

1

ay by UPI

Paid until **4 Nov 2026**. If you pay early, the new period starts when this one ends, so no days are lost.

AMOUNT PER MONTH

₹4,995

5 users × ₹999

Founding — locked

| Months | Amount  |
|--------|---------|
| 1      | ₹4,995  |
| 3      | ₹14,985 |
| 6      | ₹29,970 |
| 12     | ₹59,940 |

Scan with any UPI app (Google Pay, PhonePe, Paytm or your bank's app). Paid to

; your UPI app shows the account name

WRITE THIS IN THE UPI

Paying from a computer? UPI ID

2

Invoices

| Invoice (PDF)                                                                                                                                                                                               | Amount |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| <div>2</div> <div>NIW/2026-27/0003</div> <div>Paid 5 Oct 2026 · for 5 Oct 2026 – 4 Nov 2026</div> <div>Invoices use your company name and billing address from <b>Company</b> at the time of payment.</div> | ₹4,995 |

Marketing emails

0 of 1,000 emails used this month · 0 of 1,000 today (daily cap)

- 1 Your plan shows the date it is paid until.
- 2 Your invoice appears here.

# What you can do in NextIsWhat

Every tab in the menu, in one line each.

## THINK

|                   |                                                                                               |
|-------------------|-----------------------------------------------------------------------------------------------|
| <b>Today</b>      | Where your sales stand right now: the one account to start with, and every account by health. |
| <b>Signals</b>    | What NIW noticed in your accounts, and what to do about it.                                   |
| <b>Watch Out</b>  | What needs a manager: deals at risk, leads nobody called, your team at a glance.              |
| <b>Not Moving</b> | What is waiting, on your team or on the buyer, and for how long.                              |

## ACT

|                    |                                                                          |
|--------------------|--------------------------------------------------------------------------|
| <b>Next Action</b> | Your list for the day: overdue, today, this week, and waiting on others. |
|--------------------|--------------------------------------------------------------------------|

## MANAGE

|                  |                                                                      |
|------------------|----------------------------------------------------------------------|
| <b>Leads</b>     | People and companies you haven't sold to yet, with a score for each. |
| <b>Deals</b>     | Your opportunities by stage, with values.                            |
| <b>Companies</b> | Every company, with everything about it on one page.                 |
| <b>Contacts</b>  | Your shared address book of people.                                  |
| <b>Tracker</b>   | Your whole pipeline in one table; edit any cell.                     |

## GROW

|                  |                                                                    |
|------------------|--------------------------------------------------------------------|
| <b>Marketing</b> | Audiences, campaigns, web forms, a calendar and marketing reports. |
| <b>Answers</b>   | Six answers managers need every week, and the Monday digest.       |
| <b>Reports</b>   | What happened, by period, by person and by source.                 |

## TOOLS

|                     |                                                                     |
|---------------------|---------------------------------------------------------------------|
| <b>Templates</b>    | Ready messages for every moment, saved emails and marketing plays.  |
| <b>Game Plan</b>    | The steps for each deal stage, for you and your buyer.              |
| <b>Activity Log</b> | Every call, message and note, one by one.                           |
| <b>Settings</b>     | Your company, plan and payment, team, stages and more (owner only). |

Tip: there is also a **Training** page in the menu, with short videos for every part of NextIsWhat.

# Questions

## Do I need a card to start?

No. The 14-day trial is free, with every feature switched on, and needs no payment.

## What happens after 14 days?

If you haven't paid, your account becomes view-only: you can still log in, see and export your data, but not add or change anything. Pay by UPI and it opens again as soon as the payment is confirmed.

## How much does it cost?

One plan with Sales and Marketing together. Founding price ₹999 per user per month, locked for as long as you stay. Standard price ₹1,250 per user per month.

## How do I pay?

By UPI, with the QR code in Settings → Plan and Payment. Then type the UPI reference number (UTR) and click Send Payment Details.

## Does it work on my phone?

Yes, in any browser on a phone, tablet or laptop. Nothing to install. To add it to your home screen: on an iPhone, open nextiswhat.com in Safari, tap Share, then Add to Home Screen. On Android, open it in Chrome and choose Add to Home screen (or Install app) from the ⋮ menu.

## Can I get my data out?

Yes. The owner can download leads, deals, contacts, companies and activities any time in Settings → Export Data, even when the account is view-only.

## Need help?

Watch the short videos on the **Training** page in the menu: one for every part of NextIsWhat.

Or write to us at **hello@nextiswhat.com** (the Contact link at the bottom of nextiswhat.com).