

03. Opportunity Management

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From Prospect to Sales



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Added Value

Managing Opportunities in the CRM will help you by:

- **Recording** all business related **information and make it visible** (if it's not in SFDC it doesn't exist)
- Involving people from your GBU and get **collaboration** (opportunity team) by leveraging expertise, and identifying a lead for others colleagues from other GBUs (**cross-collaboration**)
- **Getting recognized** for your achievements, for the closed deals and the steps you went through, the difficulties, the success factors, the reasons for lost deals, etc. @ track history
- Logging or discovering **information on competitors**
- Enhancing your team's opportunities insights – **focus on the opportunities that matter the most**
- **Optimizing opportunities pipeline workflow** – standardize your sales process and keep your opportunities moving forward and see how time is spent throughout the process
- Supporting **pipeline management**: giving visibility to all opportunities opened in SFDC and how can we move them efficiently to close the deals and how to use these cases to put in place for a similar customer

What you need to know to start...

1. **Definition of an Opportunity:** an Opportunity is any potential business able to generate sales revenues with existing customers or prospects.
2. **There are three types of Opportunities:**
 - a. **Growth - Product Qualified** – to be used whenever the product is known to, approved by and possibly being used by the customer. Typically used for **market penetration**.
 - b. **Growth - Product Requiring Qualification** – to be used whenever product testing (laboratory and/or industrial) and approval is needed before closing the deal. Typically used in **innovation projects**.
3. **Cross-BU Lead:** an opportunity to share with another GBU/BU a business lead learned during an interaction with the market and that can potentially generate additional revenue for the Group.
4. **Competitive Insight:** a process of registering and sharing market intelligence obtained from customers as a result of ongoing negotiations. Such info may be registered in SFDC if the source / circumstances in which the data is obtained are mentioned.



One must never pro-actively ask for or accept detailed information on specific competitors. It is possible to ask/receive general info on competing price levels or terms /conditions if this helps to make a competitive offer. Always report to Solvay's Legal Department if detailed information about a competitor's offer is received or if any organized information exchange via the customer is suspected.

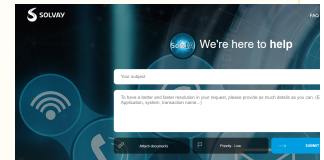
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Need Help?

To request any support or if you have identified a bug or incident, please create a Freshdesk ticket using Solvia platform : <https://solvia.solvay.com/>



you can copy users with email address, default priority is Low, then Submit. We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example