

Define the Opportunity Team

Overview

In this section, you will find information about the process to add an Account Manager in the Opportunity Team

Concerned profiles:

ALL opportunity owners

Step By Step

Table of content

- [Step By Step](#)
 - [Opportunity Stages & Process Mapping](#)
 - [Fill in the Opportunity Team](#)
- [Related articles](#)
- [Need help?](#)

Opportunity Stages & Process Mapping

The “Qualify” stage gathers the following business activities

1 - Qualify	2 - Lab Testing	3 - Industrial testing	4 - Negotiate	5 - Closed Lost / Won																								
<table><thead><tr><th>Business activity</th><th>Who?</th><th>How it translates in SFDC?</th></tr></thead><tbody><tr><td>• Collection and analysis of Customer needs</td><td>Opportunity Owner</td><td>Opportunity</td></tr><tr><td>• Analyze context (contacts with decision power, influence, competition)</td><td>Opportunity Owner</td><td>Involved Contacts, Competitive insight</td></tr><tr><td>• Involve Team</td><td>Opportunity Owner</td><td>Opportunity Team</td></tr><tr><td>• Compare needs with existing product portfolio</td><td>Opportunity Owner + Technical Marketing</td><td>Opportunity Team + Team Roles</td></tr><tr><td>• First selection of product (s)</td><td>Opportunity Owner + Technical Marketing</td><td>Product</td></tr><tr><td>• Potential business assessment</td><td>Opportunity Owner</td><td>Potential Volume (Pipeline Forecasting)</td></tr><tr><td>• Scope assessment</td><td>Opportunity Owner</td><td>Market segmentation</td></tr></tbody></table>	Business activity	Who?	How it translates in SFDC?	• Collection and analysis of Customer needs	Opportunity Owner	Opportunity	• Analyze context (contacts with decision power, influence, competition)	Opportunity Owner	Involved Contacts, Competitive insight	• Involve Team	Opportunity Owner	Opportunity Team	• Compare needs with existing product portfolio	Opportunity Owner + Technical Marketing	Opportunity Team + Team Roles	• First selection of product (s)	Opportunity Owner + Technical Marketing	Product	• Potential business assessment	Opportunity Owner	Potential Volume (Pipeline Forecasting)	• Scope assessment	Opportunity Owner	Market segmentation				
Business activity	Who?	How it translates in SFDC?																										
• Collection and analysis of Customer needs	Opportunity Owner	Opportunity																										
• Analyze context (contacts with decision power, influence, competition)	Opportunity Owner	Involved Contacts, Competitive insight																										
• Involve Team	Opportunity Owner	Opportunity Team																										
• Compare needs with existing product portfolio	Opportunity Owner + Technical Marketing	Opportunity Team + Team Roles																										
• First selection of product (s)	Opportunity Owner + Technical Marketing	Product																										
• Potential business assessment	Opportunity Owner	Potential Volume (Pipeline Forecasting)																										
• Scope assessment	Opportunity Owner	Market segmentation																										

Fill in the Opportunity Team

1

David opens his new opportunity for which he wants to add Pedro in the team

Opportunity

Yantai Zhongde_Novocare_FERTILIZER PROTECTION_2016-02-05

Back to List: Groups

CasesCompetitive insightsCross Bu LeadsInvolved AccountsInvolved ContactsOpportunity TeamProducts & ForecastVisit ReportVisitsQuotesOpen ActivitiesActivity HistoryStage HistoryOpportunity Feed

Opportunity Detail

EditDeleteSharingAdd Products & ForecastCreate quoteUpdate ForecastClose OpportunityGet quotes from initial Gap

▼ Status

1 - Qualify2 - Lab Testing3 - Industrial testing4 - Negotiate5 - Closed Lost

Note

▼ Opportunity Information

Opportunity OwnerDavid LarsonChange

Opportunity NameYantai Zhongde_Novocare_FERTILIZER PROTECTION_2016-02-05

Opportunity Convention NameYANTAI ZHONGDE FERTILIZER LIMITED_Novocare_FERTILIZER PROTECTION_2017-04-04

Account NameYANTAI ZHONGDE FERTILIZER LIMITED

GBUNovocare

BUAGG

VisibilityGBU Restricted

Stage1 - Qualify

Stage Reason

Expected Yearly RevenuesEUR 1 670 000.00

Probability (%)20 %

Close Date01/11/2016

Dummy Product Exists

Cartelization ?

2

He hovers the Opportunity Team and discovers he's already in the team! He now clicks on Add in order to add Pedro in the team

Opportunity

Yantai Zhongde_Novocare_FERTILIZER PROTECTION_2016-02-05

Back to List: Groups

CasesCompetitive insightsCross Bu LeadsInvolved AccountsInvolved ContactsOpportunity TeamProducts & ForecastVisit ReportVisitsQuotesOpen ActivitiesActivity HistoryStage HistoryOpportunity Feed

Opportunity Team

Add Account TeamDisplay AccessDelete All

Action	Team Member	Member Role	GBU
Edit / De	David Larson	Account Manager	Novocare
Edit / De	Jan Bourget	Customer Service Representative	Performance Polyamides

Note

▼ Opportunity Information

Opportunity OwnerDavid LarsonChange

Opportunity NameYantai Zhongde_Novocare_FERTILIZER PROTECTION_2016-02-05

Opportunity Convention NameYANTAI ZHONGDE FERTILIZER LIMITED_Novocare_FERTILIZER PROTECTION_2017-04-04

Account NameYANTAI ZHONGDE FERTILIZER LIMITED

GBUNovocare

BUAGG

VisibilityGBU Restricted

Stage1 - Qualify

Stage Reason

Expected Yearly RevenuesEUR 1 670 000.00

Probability (%)20 %

Close Date01/11/2016

Dummy Product Exists

Cartelization ?

3

David must now *click* on the **look-up** to open the search windows

Add Opportunity Team Members to Yantai Zhongde_Novecare_FERTILIZER PROTECTI

Team members' access level for this opportunity may be greater than your organization's default opportunity access settings. [Learn More](#)

Save Save & More Cancel

User	Team Role	Opportunity Access
User ▼	--None--	Read Only ▼
User ▼	--None--	Read Only ▼
User ▼	--None--	Read Only ▼
User ▼	--None--	Read Only ▼
User ▼	--None--	Read Only ▼

Save Save & More Cancel

4

Once the window open, he *searches* for **Pedro** and *clicks* on Pedro's name

Lookup

pedro Go!

Search Name All Fields

< Clear Search Results

Search Results

Users [1]

Full Name	Title	Phone	Email
Pedro Pinto	Commercial Excellence Process Manager	3222643405	pedro.pinto@solway.com@example.com

Copyright © 2000-2018 salesforce.com, inc. All rights reserved.

5

Before saving, David *defines* Pedro's role and Pedro's opportunity access. When he's finished, he *clicks* on **Save**.

Add Opportunity Team Members to Yantai Zhongde_Novecare_FERTILIZER

Team members' access level for this opportunity may be greater than your organization's default opportunity access settings. [Learn More](#)

Save Save & More Cancel

User	Team Role	Opportunity Access
User ▼ Pedro Pinto	--None--	Read Only ▼
User ▼	--None--	Read Only ▼
User ▼	--None--	Read Only ▼
User ▼	--None--	Read Only ▼
User ▼	--None--	Read Only ▼

Save Save & More Cancel



R
e
a
d
/
W
rite

: give
s
th
e
p
er
m
is
si
o
n
to
th
e
te
a
m
m
e
m
b
er
s
to
e
di
t
th
e
o
p
p
or
tu
ni
ty

R
e
a
d
Q
u
o
o
n
l
y

: give
s
vi
si
bi
li
ty
p
er
m
is
si
o
n
o
n
l

6

Roles are the following:

Account Manager	Technical Marketing
Key Account Manager	Global Key Account Manager
Customer Service Representative	Research & Innovation
Sales Support	Strategic Marketing
Business Development	

7

It's done! David has added Pedro in the team.

8

Pedro can now make the opportunity evolve and update some data

Opportunity
Yantai Zhongde_Novocare_FERTILIZER PROTECTION_2016-02-05

Show Feed Click to add topics: ?

Back to List: Groups

Stages Competitive Insights Cross BU Leads Involved Accounts Involved Contacts Opportunity Team Products Solvia Visit Report Links Quotes Open Activities Activity History Stage History Close

Opportunity Team

Add Add Default Team Add Account Team Display Access Delete All

Action	Team Member	Member Role	GBU
Edit Del	David Latorre	Account Manager	Novocare
Edit Del	Jean Bourquet	Customer Service Representative	Performance Polyamides
Edit Del	Pedro Pinto	Research & Innovation	

▼ Opportunity Information

Opportunity Owner	David Latorre [Change]		
Opportunity Name	Yantai Zhongde_Novocare_FERTILIZER PROTECTION_2016-02-05		
Opportunity Convention Name	YANTAI ZHONGDE FERTILIZER LIMITED_Novocare_FERTILIZER PROTECTION_2017-04-04	Stage	1 - Qualify
Account Name	YANTAI ZHONGDE FERTILIZER LIMITED	Expected Yearly Revenues	EUR 1 670 000.00
GBU	Novocare	Probability (%)	20 %
BU	Agro	Close Date	01/11/2016
Visibility	GBU Restricted	Dummy Product Exists	☐
		Cartelization ?	☐

[Back to the top](#)

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

Related articles

- [Definition, Objectives and Types of Opportunities](#)
- [Create a New Opportunity](#)
- [Clone an Existing Opportunity](#)
- [Follow the Opportunity Stages – Add Contacts in the Involved Contacts](#)
- [Follow the Opportunity Stages – Add Accounts in the Involved Accounts](#)
- [Negotiate to win](#)
- [Close the Opportunity](#)
- [Competitive insights - Create a Competitive Insight](#)
- [Cross BU Leads – Create a Cross BU Lead](#)
- [Introduction to Quote Process Management](#)