

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 - Quality	2 - Lead Testing	3 - Industrial Testing	4 - Negotiate	5 - Closed Lost	Won
Business activity • Collection and analysis of Customer needs • Analyze context (contacts with decision power, influence, competition) • Involve Team • Compare needs with existing product portfolio • First selection of product (s) • Potential business assessment • Scope assessment					
Who?		How it translates in SFDC?			
Opportunity Owner		Opportunity			
Opportunity Owner		Involved Contacts, Competitive Insight			
Opportunity Owner		Opportunity Team			
Opportunity Owner + Technical Marketing		Opportunity Team + Team Roles			
Opportunity Owner + Technical Marketing		Product			
Opportunity Owner		Potential Volume (Pipeline Forecasting)			
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_Novacare_FERTILIZER PROTECTION_2016-02-05

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+ Back to List - Groups

Cases w Competitive Insights w Cross Bu Leads w Involved Accounts w Involved Contacts w Opportunity Team w Products & Services w Visit Report Links w Quotes w Open Activities w Activity History w Stage History w Opportunity Feed

Opportunity Detail

Edit Delete Starring Add Products & Forecast Create quote Update Forecast Clone Opportunity Get quotes from Initial Ops

Status

Note

1 - Quality 2 - Lab Testing 3 - Industrial testing 4 - Negotiate 5 - Closed Lost

Opportunity Information

Opportunity Owner	P David Larson (Change)	Stage	1 - Quality
Opportunity Name	Yantai Zhongde_Novacare_FERTILIZER PROTECTION_2016-02-05	Stage Reason	
Opportunity Convention Name	YANTAI ZHONGDE FERTILIZER LIMITED_Novacare_FERTILIZER PROTECTION_2017-04-04	Expected Yearly Revenue	\$UR \$70,000.00
Account Name	YANTAI ZHONGDE FERTILIZER LIMITED	Probability (%)	20 %
OSU	Novacare	Close Date	01/11/2016
BUI	AZG	Dummy Product Exits	ⓘ
Visibility	OSU Restricted	Capitalization %	ⓘ

2 He *hoovers* 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

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Groups [View](#) Competitive Insights [View](#) Costs & Leads [View](#) Invoiced Accounts [View](#) Invoiced

The CSR in the account team is automatically added in the opportunity team

Team [View](#) Product Details [View](#) Visit Reports [View](#) Quotes [View](#) Open Activities [View](#) Activity History [View](#) Stage History [View](#)

Add Account Team Display Assets Create All

Opportunity Team

Action	Team Member	Member Role	GSU
Edit Del	David Wang	Account Manager	Novocare
Edit Del	Jian Bourque	Customer Service Representative	Performance Polymides

Note

▼ Opportunity Information

Opportunity Owner	David Wang Contact	Stage	1 - Qualify
Opportunity Name	Yantai Zhongde_Novocare_FERTILIZER PROTECTION_2016-02-05	Stage Reason	
Opportunity Conversion Date	YANTAI ZHONGDE FERTILIZER UNITED_Novocare_FERTILIZER PROTECTION_2017-04-04	Expected Yearly Revenues	EUR 1 670 000.00
Account Name	YANTAI ZHONGDE FERTILIZER UNITED	Probability (%)	20 %
GSU	Novocare	Close Date	01/11/2016
BU	Asia	Dummy Product Exists	☐
Visibility	GSU Restricted	Cartalization	☐

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] My Columns

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

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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



Read / Write

: gives the permission to the team members to edit the opportunity

Read Only

: gives visibility permission only

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

Opportunity Team

Add Add Default Team Add Account Team Display Access Delete All

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

▼ Opportunity Information

Opportunity Owner	David Lajoux [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](#)